FirstClass®

SoftArc Standards

SoftArc Inc.
Global Area Communications

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Writing is not easy; it is even less easy when you're trying to write like someone else does. In the Documentation and Design department, we've tried to develop a set of standards for writing in the "SoftArc style". The various publications that the department produces should be consistent in their handling of stylistic questions. Style is less a matter of rules than of personal taste—the stylistic conventions we've adopted are not necessarily the most correct or common language standards, but rather the ones that we like best.

In order to generate the SoftArc style, we have consulted a number of other references on the subject, and borrowed heavily from them. A cursory comparison of this manual with of some of our sources will also reveal a certain amount of shameless theft.

Also included are steps to be followed for carrying out a number of commonly encountered procedures. These ways of capturing Windows screen shots and Acrobaticizing documents are not the only ways of doing these things, but they *do* work and are intended as step-by-step instructions for newcomers.

What follows is—currently—a "living document", to which changes and major revisions are constantly being made. Suggestions for improvements will be accepted willingly, if not cheerfully.

Inside this guide

The first five chapters (after this introductory chapter) provide general information on our established standards. The following chapters provide procedures for most of the tasks that need to be done in the Documentation and Design department. The appendices provide additional useful information, usually in the form of a list or table.

SoftArc language ABCs (Chapter 2): contains a useful alphabetical list of tricky words and phrases, along with the spelling or treatment that we at SoftArc have agreed to use consistently.

Language standards (Chapter 3): describes language standards that we have adopted to keep our language use and writing style consistent and includes information on how to use boilerplate text.

Formatting standards (Chapter 4): describes formatting standards that we have adopted to keep the look of SoftArc's documentation consistent and includes information on how to use FrameMaker 5 templates.

Folder and file naming standards (Chapter 5): explains our system for naming folders and files.

FrameMaker book standards (Chapter 6): describes how we structure our FrameMaker book files.

Using our templates (Chapter 7): explains how to apply the standard template to an existing book and how to use the standard template to create a new book.

Inserting symbols (Chapter 8): describes how to insert special symbols into your documents.

Using conditional text (Chapter 9): describes how to use the Conditional text feature of FrameMaker to create one document that can be used for all FirstClass platforms.

Capturing screens (Chapter 10): describes how to add screen shots to the text in our manuals.

Preparing for a review (Chapter 11): describes how to prepare for a review, either a peer edit by another Documentation and Design writer, or a regular review by a member of another SoftArc department.

Finalizing the document (Chapter 12): describes how to handle the review comments and finalize your document.

Creating Acrobat documents (Chapter 13): describes how to translate a FrameMaker document into an Acrobat (PDF) document.

Posting Acrobat documents online (Chapter 14): describes how to create the ReadMe file that accompanies the new manual, and how to create a PDF version of this ReadMe file. It also explains how to create the Stuffit archive that will be attached to the posting message.

Creating online help (Chapter 15): describes how to create online help for our applications. It also describes how to maintain our online server help folder.

Creating ReadMe files (Chapter 16): describes how to create ReadMe files for both Macintosh and Windows applications.

Storing paper documents (Chapter 17): describes the structure of the Customer Documentation folder on the Database volume. It also explains how to store old review drafts, and discusses our Documentation and Design library.

Archiving electronic documents (Chapter 18): describes how to archive printed documents, Adobe Acrobat documents, Help files, and ReadMe files.

Sending a manual for translation (Chapter 19): describes some considerations involved when preparing a manual for translation, and outlines the procedure for sending a manual to be translated.

Backing up D&D computers (Chapter 20): describes the procedure for performing backups and restoring files.

Sharing files (Chapter 21): describes the procedure for accessing other Documentation and Design computers.

Scanning images (Chapter 22): describes the procedure for using the scanner.

Writing e-mail, SoftArc style (Chapter 23): provides tips on how to write e-mail to people outside SoftArc in order to represent the company in as professional a manner as possible.

Maintaining the glossary (Appendix B): lists the styles, cross-reference formats, and other details specified in our FrameMaker 5 templates, and explains how the Acrobat templates differ.

Trademarks (Appendix C): lists the useful information on trademark own-
ership that we've been able to gather, from which you can select the word-
ing required for the copyright page of an individual document.

How to review a SoftArc manual (Appendix D): provides an adaptation of
the Documentation and Design PowerPoint presentation. It describes the
documentation cycle, and provides reviewing procedures for members of
other SoftArc departments.

SoftArc language ABCs

Sometimes there is no hard and fast rule for certain words. We in the Documentation and Design department, always on the cutting edge of linguistic fashion, have rules of our own. Through a long involved process of discussion, negotiation, and foot-stamping, we have agreed on one consistent spelling or treatment. Some of them are arbitrary, but most of them have at least some basis in reasoned thought.

Some of these decisions are fairly recent, so you may find inconsistent examples in existing FirstClass manuals. As we go through the process of updating, we'll weed out all the obsolete usages.

A

abbreviations: Don't use abbreviations such as *e.g.*, *i.e.*, or *etc.*

above: If possible, avoid using above and below—depending on the final pagination of the document, the item to which you are referring may no longer be on the same page. Use *preceding* and *following* instead.

administering: *Administering,* not *administrating*.

administrator: On a FirstClass system, the most important user is the *administrator* (with a lower case a). He or she can appoint any number of *sub-administrators* to help carry out his or her duties.

See also **administering**.

A.M.: The standard format for A.M. and P.M. is small caps. There should be a space after the number and periods after the letters:

8:35 A.M.

ampersands (&): Don't use them, unless you are referring to something that appears in a dialog or SoftArc form, such the name of a field. Use the word *and* instead.

AppleTalk: Upper case A and T.

application: Use *application* rather than *program* (except in the Windows term *program group*).

arrows (→): Describe a menu choice by telling the user which application the menu is to be found in, and giving the menu and command, separated by the arrow from the SoftArc Dingbats font menu (→). In FrameMaker, to create the arrow, press Shift +], and then apply the SoftArc Dingbat 10 format:

From the FirstClass Server menu, choose Server → Polite Shutdown.

Also use arrows to describe nested folders or conferences. For example, to refer to the CLUI Customization conference, which is located within other conferences on SoftArc Online, we say Conferences → Technical Support → Tech Notes → CLUI Customization.

See also **menus**.

auto-register: Hyphenated, lower case a and r.

B   **back up and backup:** The noun is one word; the verb is two words. For example:

Back up your files every day. You never know when you might need to use your backup.

base server: Do not use. Use *basic server*.

batch administration: Lower case b and a, unless it's at the beginning of a sentence. Don't say *admin*.

baud rates: After much research and discussion, we've decided on the following format to describe the speed of a modem:

Correct: a 14400 bps modem

Incorrect: a 14.4 baud modem

Incorrect: a 14.4 K baud modem

Incorrect: a 14.4 K bps modem

Incorrect: a 14,400 baud modem

below: See **above**.

better: When listing hardware requirements for SoftArc products, use the word *better*, rather than *greater* or *later*. Enclose the phrase in parentheses. For example:

> The computer on which you install the FirstClass Server must have an Intel-compatible 80386 DX processor (or better).

> See also **later**.

button: A button is *clicked*, not clicked on or pressed. Don't use the actual term button at all, if you can avoid it:

> When you have finished, click Save.

Reproduce in the text exactly what appears on the button, even if that varies from dialog to dialog (*OK* versus *Ok*, for example).

C

cc:Mail: Lower case c (two of them), upper case M.

CD-ROM: All upper case, and hyphenated.

checkbox: One word, not two.

choose: The user *chooses* an item to carry out an action, such as starting an application, opening a window, or carrying out a command.

> See also **select.**

Client: Capitalize when you are referring to the name of a product; otherwise use a lower case c. For example:

> Install the FirstClass Client for Windows. The client application is easy to use.

> FirstClass Clients and Servers both offer native modem support.

> See also **Server.**

client/server: With a slash, not a hyphen.

CLUI: Avoid wherever possible; use *command line user interface* instead.

See also **command line user interface**.

Command key: Spell *Command* out in full whenever possible (this is sometimes difficult in a table format). Keys are *pressed*, not hit or struck or selected.

command line: Two words, not hyphenated.

command line user interface: Generally preferable to *CLUI*, which is essentially a techie colloquialism. Use full words unless the phrase must appear so frequently that it would be extremely awkward, in which case always use full words for the first appearance.

common problems: Do not use. Use *possible problems* instead. This decision is fairly recent, so you may find many inconsistent examples in existing FirstClass manuals.

Control key: Spell *Control* out in full whenever possible (this is sometimes difficult in a table format). Keys are *pressed*, not hit or struck or selected.

cooperate (and other forms of the word): No hyphen.

coordinate (and other forms of the word): No hyphen.

corrupt: A file is corrupt, or, a file has been corrupted. Consider using *damaged* instead.

cross-platform: Hyphenated.

D   **Delete key**: Spell *Delete* out in full whenever possible (this is sometimes difficult in a table format). Keys are *pressed*, not hit or struck or selected.

department names: Capitalize the first letter of the actual name, but not the word *department,* whether it's actually included or just implied. For example:

Correct: Contact the Technical Support department.

Correct: Contact Technical Support.

Incorrect: Contact technical support.

deprotect: To cancel the protection of a conference or message. For example:

To deprotect and delete a conference, follow these steps.

deselect: To cancel a selection. For example:

For BinHexing preferences, deselect all options.

See also **unselected**.

desktop: One word, lower case letters, unless found at the very beginning of a sentence. Do not use an upper case T, even if that's how it appears in the form or dialog.

Correct: Your desktop appears.

Incorrect: Your Desktop appears.

Incorrect: Your DeskTop appears.

dialing: According to Webster's, either *dialing* or *dialling* is correct, but *dialing* is more common, so that's what we use.

dialog: Not *dialog box*. Something pertaining to the operating system, such as a Save or an Open dialog.

See also **display**, **form, screen**, and **window**.

dialup: One word.

digits: See **numbers**.

dimming: When a menu command is made unavailable by graying it out, this is called *dimming*.

Directory: FirstClass users are listed in the *FirstClass Directory* (upper case D) not the *directory* or *user directory,* or any variation thereof. If you are talking about the organization of files in the Windows environment, use lower case d.

disk drive: The opening into which the user inserts a diskette. It is not a *floppy disk drive* or a *floppy diskette drive*. This decision is fairly recent, so you may find many inconsistent examples in some FirstClass manuals. Also, when you instruct a user to insert a diskette into drive A, do not include the colon after the A.

diskettes: Small devices for storing data magnetically are called *diskettes*, not disks. This decision is fairly recent, so you may find inconsistent examples in some FirstClass manuals.

display: (noun) Usually a box providing status information.

> See also **dialog, form, screen**, and **window**.

double-click. The noun is two words; the verb is hyphenated. For example:

> Double-click the Gateways icon. Small children may have trouble performing a double click.

It is highly unlikely that you will ever use the noun.

E **e.g.:** Don't use. Say *for example,* or rephrase the sentence.

e-mail: This word is hyphenated, with a lower case e, unless it's the first word in a sentence.

Enter key: On a Macintosh, a user generates a line-feed by pressing the *Return* key. On an IBM-compatible computer, a user does so by pressing the

Enter key. Spell *Enter* out in full. Keys are *pressed*, not hit or struck or selected.

etc.: Don't use. Say *and so on*, or rephrase the sentence.

F   **FC:** Avoid where possible; use *FirstClass* instead.

FCP file: FCP all in upper case.

fields: Instructions to fill in a field are presented with each word capitalized (except for conjunctions and short prepositions, if any):

> *Correct:* For Remote Server Serial Number, enter "FaxGate".

> *Incorrect:* For Remote server serial number, enter "FaxGate".

If filling in a field is optional, required, or filled in automatically (called "display only"), you can include this information if you feel it would be useful to the user. The words *Optional, Required,* or *Display only* should appear without parentheses, and should be followed by a period:

> *Zone:* Optional. Enter the name of the . . .

A field name should always appear without punctuation at the end; ellipses and colons should be omitted.

filename: Files are *named* things, not called them:

> Look for a file named TCP-IP.FCP.

Incidentally, *filename* is one word.

file sharing: Two words, no hyphen.

FirstClass: *FirstClass*, not *First Class*. Do not allow FrameMaker to hyphenate. For more information on suppressing hyphenation, refer to .

FirstClass system: A FirstClass system is that part of a FirstClass organization supported by one server. A bunch of systems hooked up together by gateways is a network of servers.

floppy disk drive or **floppy diskette:** Do not use in any variation.

See also **disk drive**.

folders: Folder names are capitalized, but not quoted or italicized.

See also **arrows**.

foreign e-mail systems*:* Do not use this term to describe non-FirstClass mail systems. Use *other e-mail systems*.

form: Something you have to fill out, usually created by SoftArc for our applications, such as a Login form. Note that the name of the form is capitalized, but not the word form itself; for example, Preferences form.

See also **dialog**, **display**, **screen**, and **window**.

G   **gateway:** Lower case g, unless you're referring to the name of a product, in which case you should refer to the entire product name, such as the *FirstClass Gateway for cc:Mail*.

greater: See **later**.

GUI: Avoid wherever possible; use *graphical user interface* instead.

See also **command line user interface.**

H   **hard disk:** Computers contain *hard disks*, not hard drives.

highlight: Avoid; use *select* instead.

high-speed modem cable: Use instead of *serial cable* if you are referring specifically to a high-speed modem cable.

I   **ID:** Not *id*. This decision is fairly recent, so you may find inconsistent usage in some FirstClass manuals.

i.e.: Don't use. Say *for example*, or rephrase the sentence.

import: You import a file *into* another file.

Internet service provider: Upper case I, lower case s and p. *ISP* is fine, as long as it has been spelled out in full once.

it's and its: This is one of the most common, and jarring, errors in writing. The phrase *it's* (with an apostrophe) is a contraction for *it is*. The word *its* (without the apostrophe) is a possessive pronoun. For example:

> It's easy to install. Just move the file to its directory.

If you're not sure about which to use, mentally rewrite the sentence using the phrase *it is*—if it works with *it is*, use *it's* with an apostrophe; otherwise, use *its*. Never use *its'*—that is never correct.

K   **kilobytes**: See **megabytes**.

L   **later:** When listing software prerequisites for the installation procedure, use the word *later*, rather than *greater* or *better*. Enclose the phrase in parentheses. For example:

> . . . a FirstClass system running version 2.5 (or later) of the FirstClass Server application

> See also **better**.

log in: The noun is one word; the verb is two. A user *logs into* an *online* service, but performs the *login* procedure. This rule goes out the window when it comes to other peoples' products; to use Windows NT, for example, you have to go through the logon procedure.

log off: A user *logs off from* an *online* service, or disconnects.

M   **Macintosh:** Apple Computer produces the *Macintosh*, not the Mac; in fact, come to think of it, Apple produces quite a lot of *Macintoshes*.

Mac™ OS: This is the correct way of referring to the Macintosh platform. Use it in copyright pages, but not in running text.

mailbox: Lower case m and b, unless found at the very beginning of a sentence. Do not use an upper case B, even if that's how it appears in the form or dialog.

megabytes: After a numeral, use the abbreviation *MB*. Do not discuss *megs of RAM*. Separate the MB from the number with a space.

> Your server computer should have at least 16 MB of RAM.

Spell it out for the first occurrence.

> Your server computer should have at least 16 megabytes (MB) of RAM.

menus: Menus contain *commands*, not items, none of which contain an ellipsis. A user *chooses* a menu command in both the Macintosh and the Windows platform.

Describe a menu choice by telling the user which application the menu is to be found in, and giving the menu and command, separated by the arrow from the SoftArc Dingbats font($\rightarrow$):

> From the menu bar, choose Server $\rightarrow$ Polite Shutdown.

> See also **arrows**.

MDM file: MDM all in upper case.

Microsoft: *Microsoft*, not *MicroSoft*.

modem cable: Use instead of *serial cable*, if you are referring specifically to a modem cable. *See also* high-speed modem cable.

MUI: Avoid wherever possible; use *Macintosh user interface* instead.

multi-hop: Hyphenate.

multiplatform: One word, no hyphen.

multitasking: One word, no happen.

multivolume: One word, no hyphen. Do not use an upper case V, even if that's how it appears in the form or dialog.

> **Note:** As a rule, words beginning with "multi" are one-word, no hyphen, unless, as in the case of multi-hop, it would be very awkward. For more information on hyphenation, refer to .

N

NDN: See **non-delivery notice**.

network: A user is working *on*, not *in*, a network.

non-delivery notice: Not non-deliverable notice, or nondelivery notification. Spell it out in full for the first instance; after that, use NDN.

note: The word *Note* appears in bold and italics, followed by a colon. The text itself appears in regular style, and is not italicized or bolded.

> See also **warning**.

numbers: In general text, you should spell out the words for numbers from one to twelve, unless you're referring to a page number. Type the actual digits for numbers above twelve. However, if you are writing technical instructions, type the digit, no matter what it is. For example, say:

> You can connect to SoftArc Online in one of two ways.

But:

> In the Conference items expire after box, type "7".

Don't ever start a sentence with a number. Rephrase so that the number appears somewhere in the middle.

See also **percentages**.

O   **online**: One word, no hyphen.

Option key: Spell *Option* out in full whenever possible (this is sometimes difficult in a table format). Keys are *pressed*, not hit or struck or selected.

other e-mail systems: Use this term to describe non-FirstClass mail systems rather than *foreign e-mail systems*.

P   **parameters**: Instructions to a user on how to enter parameters take a format similar to:

<FirstClass user name>

or

<alias>@<gateway name>

This decision is fairly recent, so you may find many examples in some FirstClass manuals using the vertical bar (|) to denote an alternative. We found that users didn't always understand this, so we've changed to the current format.

part numbers: Part numbers appear on the copyright page and on the last page of each manual. The format is as follows: SOF3130-M (for Macintosh) or SOF3130-W (for Windows).

pathname: One word. Do not allow FrameMaker to hyphenate pathnames. For more information on suppressing hyphenation, refer to .

PC: Although this is often considered a generic term, it really is a model of IBM personal computer. If you are talking about the platform, refer to *Windows* instead; if you are talking about the hardware, use the word *computer*.

PDF file: PDF all in upper case.

percentages: Use digits and a % symbol, as in 10% (no space between the number and the symbol).

phone numbers: See **telephone numbers**.

P.M.: See **A.M.**

post office: Lower case p and o.

possible problems: In the Troubleshooting chapter, use *possible problems*, rather than *common problems*.

Power Macintosh: The latest generation of Apple's machines are *Power Macintoshes*, not Power Macs, and definitely not PowerMacintoshes. The trade name of the chip these machines run on is the *PowerPC*.

program: See **application**.

protect: To prevent a conference from being deleted, the administrator can *protect* it. The act of removing that protection is *deprotecting* it. Such a conference is *unprotected.*

R   **RAM:** All upper case.

ReadMe: One word, upper case R and M.

refer to: For all types of cross-references in text, use the phrase *Refer to*. For example:

> For more information, refer to *Administering FirstClass*.

> See also **see.**

remote name: Lower case r and n, unless it's the name of a field.

resize: One word, no hyphen.

Return key: On a Macintosh, a user generates a line-feed by pressing the *Return* key. On an IBM-compatible computer, a user does so by pressing the

Enter key. Spell *Return* out in full. Keys are *pressed*, not hit or struck or selected.

route: Lower case r, unless it's the name of a field.

S   **screen:** Do not use. Use *form*, *dialog, display,* or *window* instead, depending on the situation. (This *SoftArc Standards Guide* refers to *screen* shots, but there should be no reason to use that term in the manuals that describe our products.)

See also **dialog**, **display**, **form**, and **window**.

see: Use *See* and *See also* (in italics) for index entries and glossary entries (similar to this ABC list).

See also **refer to.**

select: A user *selects* text to highlight it. Selecting an item usually means marking it with the cursor; selecting alone does not start an action. Also use the word *select* for placing an X or a check mark in a checkbox, and for selecting an item in a selection list.

See also **choose.**

serial cable: See **modem cable**.

Server: The word *server* can refer to a computer or to a piece of software. If you are referring to the computer itself, use lower case. If you are referring to the software, capitalize when you are referring to the name of a product, and include the article *the*; otherwise use lower case. For example:

The gateway delivers a message to the server.

Install the FirstClass Server for Windows.

FirstClass Servers and Clients both offer native modem support.

The server application is easy to install.

See also **Client.**

settings document: Use lower case s and d. Use the word *document* rather than *file* or *form*. This decision is fairly recent, so you may find many inconsistent examples in some FirstClass manuals.

settings file: See **Settings document**.

setup and set up: The noun is one word; the verb is two words. A computer system, referred to colloquially, is a *setup*, not a set-up (this construction should be avoided where possible). The verb, however, is *to set up*, not *to setup*, and can be used freely.

Shift key: Spell *Shift* out in full. Keys are *pressed*, not hit or struck or selected.

simply: Do not use the word *simply* in an instruction, as in: "Simply open the form and complete the fields." We should assume that our software is easy to use.

SoftArc: *SoftArc*, not *Soft Arc* or *Softarc*. Do not allow FrameMaker to hyphenate. For more information on suppressing hyphenation, refer to <u>"Suppressing hyphenation" on page 41</u>.

space bar: Two words, lower case s and b.

spelling checker: In general, try to avoid referring to the spelling checker by name. Instead, discuss "checking the spelling in your document".

sub-administrator: Hyphenated, lower case s and a.

subconference: One word, no hyphen.

subfolder: One word, no hyphen.

submenu: One word, no hyphen.

system: As a rule, use lower case s: for example, "FirstClass system". However, if the word system is part of a function, it should have an upper case S; for example, "System Monitor".

Tab key: Keys are *pressed*, not hit or struck or selected.

telephone numbers: Use a hyphen, and no space, instead of parentheses to separate an area code from the rest of the phone number; for example:

Call SoftArc at 905-415-7144.

telnet: All lower case.

that: *That* is a defining pronoun, used to help identify a subject:

The files that are used by the server can be found in . . .

You can often (but not always) eliminate the word *that* and simplify the sentence. For example:

The files used by the server can be found in . . .

See also **which.**

the Web: See **World Wide Web**.

third-party: Hyphenated, as in *a third-party product*.

token ring: Lower case t and r, unless it's part of a product name.

trash collection: Lower case t and c, unless it's at the beginning of a sentence.

TrueType: One word, two upper case T's.

twenty-four hour: Use *24-hour.*

U **UNIX**: Not *Unix.*

upgrade: We upgrade software, as opposed to *updating* it.

unselected: Describes something that has not yet been selected. For example:

Leave the other options unselected.

See also **deselect**.

user ID: See **ID**.

V   **versions (of software):** When listing software prerequisites for the installation procedure, you may want to indicate which versions are acceptable. For example:

a FirstClass system running version 2.5 (or later) of the FirstClass Server application

For software versions, use the word *later*, rather than *greater* or *better*. For hardware, use the word *better*.

W   **warnings**: The word *Warning* appears in bold and italics beside the warning icon, and is followed by a colon. The text itself appears in regular style, and is not italicized or bolded.

See also **note**.

whether: Do not add the phrase *or not* when using the word *whether*; it's redundant. For example:

Correct: When a FirstClass Server receives a piece of mail destined for another site, it first determines whether it has a gateway to that site.

Incorrect: When a FirstClass Server receives a piece of mail destined for another site, it first determines whether or not it has a gateway to that site.

which: *Which* is a non-defining pronoun; it is used to give further information about a subject, but not to aid in its identification:

The Get Info command, which serves a number of purposes, is under the File menu.

See also **that**.

window: Usually a box providing status information; the term may be confused with the Windows platform. Use *Display* instead.

See also **dialog**, **display**, **form**, and **screen**.

World Wide Web: Three words, all caps, no hyphens. You may also use *the Web*, or the abbreviation *WWW,* as long as you spell it out for the first instance.

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Language standards

At SoftArc, we follow certain language standards to ensure that the language usage and writing style in all our documentation is consistent. This chapter describes language standards for the following general topics:

- [American and Canadian spelling](#)

- [Boilerplate text](#)

- [Capitalization](#)

- [Cross-references](#)

- [Hyphenation](#)

- [Political correctness](#)

- [Voice, tense, and modes of address](#)

American and Canadian spelling

Although SoftArc is a Canadian company, most of our business is done outside Canada, with much of it in the United States. Therefore, for business reasons, we use American spelling for words such as "color" and "favorite".

Boilerplate text

Many of our manuals contain sections that are the same or very similar. For example:

- Symbols and conventions

- Obtaining technical support

- Obtaining updates

To ensure the consistency of these sections, we have prepared boilerplate text for them. (Although we normally import graphics by reference, graphics in the boilerplate are copied into the file, to ensure that they are transported with the boilerplate text.)

This section explains how to use boilerplate text, and what to do if you receive review comments on boilerplate parts of your document.

Using boilerplate text

To use a boilerplate, follow these steps.

1) On SoftArc Online, open the SoftArc Documentation → Useful Dept Things → Boiler Plates folder.

2) Open the message containing the boilerplate you want to use.

3) Save the boilerplate document to your computer.

4) Open the boilerplate document.

5) Select its contents and copy them to the clipboard.

6) Paste the boilerplate text into the desired location in your document.

7) Scroll through the boilerplate text, looking for red text. Replace any red text you find with text customized to your document.

Changing boilerplate text

If you receive review comments on boilerplate text, do not apply them immediately. Changes to boilerplate text must be approved by all members of the department.

Once a change is approved, provide the new text to the keeper of the boilerplates, so that the Boiler Plates folder can be updated.

Capitalization

This has been the subject of some debate. In general, when in doubt, avoid capitalization. There are, however, many situations that do require capitalization.

- Always capitalize the first word of a sentence, even if the word is a proper noun that is not normally capitalized.

- Capitalize all full product names, but leave uncapitalized any descriptions of what they do. FirstClass Gateway for Microsoft Mail, for example, creates a gateway to another mail system (one exception to the general rule: references to cc:Mail).

- Capitalize the words Server and Client if they are preceded by the name FirstClass.

- Capitalize the names of SoftArc departments, but not the word *department*. For example: *the Technical Support department*, or just *Technical Support*.

- Names such as variable names and screen names should stand out in the text. You should capitalize every word, as you would for a proper name or the title of a book, even if the entire name is not capitalized in its context. For example:

    Correct: For Connect Via, select AppleTalk.FCP.

    Incorrect: For Connect via, select AppleTalk.FCP.

- Capitalize all letters in common abbreviations for file types, such as FCP, MDM, or PDF files.

Note: To check on the SoftArc standard capitalization of a particular word, refer to the alphabetical listing in "SoftArc language ABCs" on page 17. For information on formatting certain words or acronyms using small caps, refer to "Small caps" on page 57.

Cross-references

FrameMaker provides a very powerful cross-reference feature that you can use to generate cross-references in several different formats, depending on the situation.

For all types of cross-references, use the phrase *Refer to* rather than *See*. Use a complete sentence, starting with *For more information,* and do not use parentheses.

Correct: The administrator can delegate some or all of these powers to sub-administrators. For more information, refer to "Sub-administrators" on page 111.

Incorrect: The administrator can delegate some or all of these powers to sub-administrators. (For more information, refer to "Sub-administrators" on page 111.)

Incorrect: The administrator can delegate some or all of these powers to sub-administrators (for more information, refer to "Sub-administrators" on page 111).

Incorrect: The administrator can delegate some or all of these powers to sub-administrators (refer to "Sub-administrators" on page 111).

Incorrect: The administrator can delegate some or all of these powers to sub-administrators. Refer to "Sub-administrators" on page 111 for more information.

Cross-references to other manuals

If you want the reader to refer to another manual for further information, make the cross-reference to the name of the book, in italics, without the word *manual*. For example:

Correct: For more information, refer to *Administering FirstClass*.

Incorrect: For more information, refer to the *Administering FirstClass* manual.

Do not include page numbers or chapter names or numbers in your cross-reference, because these could quickly become incorrect.

Cross-references to an entire chapter

If you want the reader to see a whole chapter in the current manual for further information, make the cross-reference to the chapter number and name. FrameMaker will automatically format the cross-reference properly. For example:

For more information, refer to .

Note: If the cross-reference is to a chapter in another manual, do not include chapter names or numbers in your cross-reference, because these could quickly become incorrect.

Cross-references to another section, page, or step number

If you want the reader to read a section of the current manual for further information, make the cross-reference to the appropriate cross-reference type. FrameMaker will automatically format the cross-reference properly. For example:

For more information, refer to .

Cross-references that fall on the same page

If you create a cross-reference to the preceding or following section, the page reference might be the same as the page it appears on. Because this looks awkward, it's tempting to use the word *preceding* or *following* instead. However, this may cause problems if you rearrange the sections, or if the pagination changes.

Therefore, even though it looks a bit awkward, stick to the standard page reference.

Hyphenation

The topic of hyphenation consists of three very different subtopics:

- end-of-line hyphenation (done automatically by FrameMaker)

- the composition of individual words (whether they should be hyphenated, all one word, or two separate words)

- suppressing hyphenation

End-of-line hyphenation

SoftArc uses ragged right justification in page layout because it is easy to read. In order to avoid the awkwardly short lines that can result in ragged

right, our documents are set to hyphenate, according to FrameMaker's internal rules and previously-defined paragraph styles.

Our documents are set to hyphenate automatically only if the prefix or suffix is three letters or longer. However, previously our styles allowed for prefixes and suffixes of only two, which is sometimes jarring to the eye. You may come across older documents, or passages within new documents that were copied from older documents, whose styles have not been changed. If so, change them yourself (in the Advanced Properties dialog of the Paragraph Designer).

Hyphenation of individual words

Like the issue of capitalization, this too has been the subject of some debate. Here are two sets of rules:

From *The Associated Press Stylebook and Libel Manual, Revised Edition*:

Compound modifiers

When a compound modifier—two or more words that express a single concept—precedes a noun, use hyphens to link all the words in the compound except the adverb *very* and all adverbs that end in *ly*.

Prefixes

Generally, do not hyphenate when using a prefix with a word starting with a consonant: for example, *multiplatform*.

Three rules are constant, although they yield some exceptions to first-listed spellings in Webster's New World Dictionary.

- Except for cooperate and coordinate, use a hyphen if the prefix ends in a vowel and the word that follows begins with the same vowel.

- Use a hyphen if the word that follows is capitalized.

- Use a hyphen to join doubled prefixes: sub-subconference.

From Strunk and White's *Elements of Style, Third Edition*:

- "When two or more words are combined to form a compound adjective, a hyphen is usually required. 'He belonged to the leisure class and enjoyed leisure-class pursuits.' 'He entered his boat in the round-the-island race.'

- "Do not use a hyphen between words that can better be written as one word: water-fowl, waterfowl. Your common sense will aid you in the decision, but a dictionary is more reliable. The steady evolution of the language seems to favor union: two words eventually become one, usually after a period of hyphenation."

Suppressing hyphenation

Do not allow hyphenation for some words and phrases. For example, FirstClass, SoftArc, and any pathnames (C:\FCWIN\DOWNLOAD) should not be hyphenated. There are two ways to prevent hyphenation. You can use your FrameMaker dictionary to suppress hyphenation of all instances of the word (use this for words you use often, such as FirstClass and SoftArc), or you can use a keystroke to instruct FrameMaker not to hyphenate an individual word.

Using the dictionary

To suppress hyphenation of all instances of a word, follow these steps.

1) Open the Spelling Checker.

2) Type the word and click Show Hyphenation.

3) Remove the hyphens that FrameMaker inserts.

4) Type a hyphen at the beginning of the word.
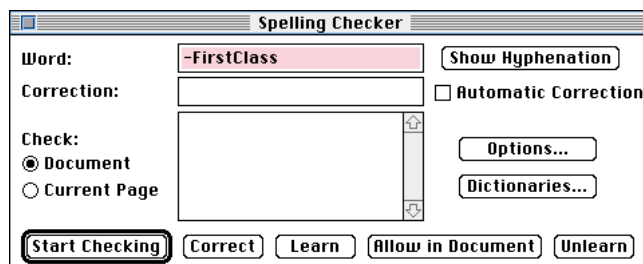
5) Click Learn. (This step records the change in Framemaker, but not in the open document.)

6) To rehyphenate your document so you can see your changes, click Dictionaries.

```
╔════════ Dictionary Functions ════════╗
  ○ Personal Dictionary:  │ Write to File      ▼│
      Beth:...:FrameMaker1:Personal Dictionary
  ○ Site Dictionary:      │ Change Dictionary  ▼│
      Beth:...:Dictionaries:Site Dictionary
  ○ Document Dictionary:  │ Write to File      ▼│
  ○ Write All Unknown Words to File...
  ● Clear Automatic Corrections
  ○ Mark All Paragraphs for Rechecking
  ○ Rehyphenate Document
  ─────────────────────────────────────
  (   OK   )      ( Cancel )      (  Help  )
```
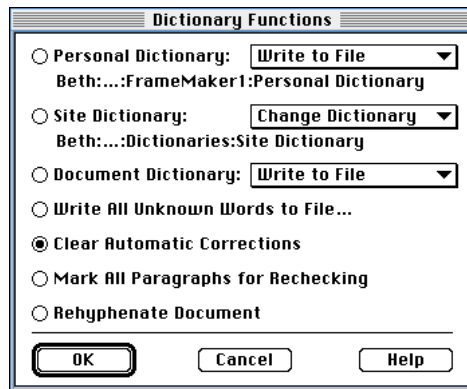
7) Select Rehyphenate Document.

8) Click OK.

Suppressing hyphenation for one word
You can use a keystroke to suppress hyphenation for a word or pathname that you don't use often enough to put in your dictionary. To do so, follow these steps.

1) Place the cursor at the beginning of the word.

2) Press Command + Option + Hyphen.

If the word falls at the end of a line, FrameMaker moves it to the beginning of the next line.

Note: To check on the SoftArc standard hyphenation of a particular word, refer to the alphabetical listing in "SoftArc language ABCs" on page 17.

Political correctness

This is tricky. Although you should usually address the reader in the second person (*you*), you may sometimes want to use the third person (*he* or *she*). For example, when you write instructions for an administrator to apply to a user, you might write the following sentence.

> Change the user's Information form so that he has a longer time limit.

However, in this example, the use of the word *he* can be construed as sexist language. In order to avoid this, you can use *he or she*, but this can become awkward very quickly. You can also use the plural *they*, but this is not always appropriate. Use your own common sense.

Whatever you do, don't use *(s)he*—it's awkward and artificial. If you do use the plural, be sure to be consistent—don't mix singular and plural. For example, don't say:

> *Incorrect:* After the user has auto-registered, they can start to use FirstClass.

Voice, tense, and modes of address

Voice

In your writing, use the *active voice* because it is simpler, shorter, more direct, and easier to understand. Use the passive voice only:

- if you want to stress the object of the sentence

- if the actor is unimportant or unknown

- if the sentence is less clumsy and significantly clearer than it would be in the active voice

Tense

Use the present tense when making ordinary, objective statements. Using the future tense, especially when describing features or functions, can be confusing. It might even lead the reader to believe that whatever you're describing isn't possible now, but will be only in future releases.

Correct: Double-click the settings document for your FirstClass system. The Login form appears.

Incorrect: Double-click the settings document for your FirstClass system. The Login form will appear.

Mode of address

When writing an instructive or procedural document, always refer to the reader as "you", rather than as "the reader" or "the user", and use the imperative to describe actions he or she should take. Addressing the reader directly is widely considered to be the most readable and effective way of communicating with a customer. It's often much shorter, too.

Correct: Double-click the settings document for your FirstClass system.

Incorrect: The user should double-click the settings document for the FirstClass system to which he or she wants to connect.

Formatting standards

Just as we follow certain language standards to ensure that the language and writing style in all our documentation is consistent, we also follow formatting standards to ensure that the look is consistent from document to document. This chapter describes formatting standards for the following general topics:

- Conferences in FirstClass

- Error messages

- Field names

- Headings

- Lists

- Notes and warnings

- Punctuation

- Small caps

- Special formatting

- Tables

- Text alignment

- Widows and orphans

Many of these items are set up automatically in our templates. To ensure that your FrameMaker documentation follows the correct formatting, you should use the correct templates. Refer to Chapter 7, "Using our templates".

Conferences in FirstClass

When you refer to the location of a conference buried several levels deep within another conference, it has been SoftArc practice to use colons to separate the names of each conference. For example:

You can download the latest version of the client application from SoftArc Online (Conferences:Software Libraries:FirstClass Software).

This can sometimes be difficult to read. To make it easier to read, and also to represent the actions the user must take, use an arrow instead, as we do for menu choices:

You can download the latest version of the client application from SoftArc Online (Conferences → Software Libraries → FirstClass Software).

Error messages

In many of our Troubleshooting chapters, we include a list of error messages. To format an error message correctly, follow these steps.

1) Use the Error message style.

2) After each part within the error message, press Shift + Return instead of just Return. This keeps everything together within the one error message, and lined up properly. For example:

1001　　　　*Message:* Your version of FirstClass software is incompatible with the server. Please obtain an updated version.
Meaning: This error occurs if you are running an old version of the FirstClass Client software. Get a current version.

3) For some manuals, you may have to show two different versions of error message wording (in an *Administering FirstClass* manual, for example). If so, use the following format:

1001　　　　*Client message:* Your version of the FirstClass software is incompatible with the server. Please obtain an updated version.
Server message: Server/Client version mismatch
Meaning: This error occurs if the client is running an old version of the FirstClass Client software. Give the user the current version.

4) After the last part of the error message, press Return to move on to the next error message.

Field names

The way we describe fields in our manuals depends on the number of fields to be described in a particular procedure.

For one or two fields

When a procedure requires the user to complete only one or two fields, use numbered steps to document the fields. For example:

1) For TCP/IP Port, select the TCP/IP port on the server.

For three or more fields

When a procedure requires the user to complete three or more fields, use an introductory sentence, followed by a colon. Our usual introductory sentence is "Enter information into the following fields:" or, for optional changes, "Modify the following fields as needed:".

Then format the fields as list entry (no bullet), with the field name in Field name format (italics). For example:

1) Enter information into the following fields:

   Route Via Gateway: The name of the gateway that is the next hop on the path to the server on which the user is registered.

   Site Name: The serial number of the server on which the user is registered.

Providing additional field instructions

In addition to the usual description of a field, as mentioned in the previous section, we sometimes provide additional information, such as whether the field is required, optional, display only, and so on. To do so, we include the appropriate wording immediately after the field name and colon, with a capital and period, followed by the description. For example:

   First Name: Optional. The user's first or given name.

   Last Name: Required. The user's last name or surname.

Sometimes the field instructions must indicate that the user should complete the field only under certain conditions (for example, only if he or she completed another related field). In this situation, start the field description sentence with the condition (rather than leaving it to the end). For example:

> *Reply Automatically:* Whether you want FirstClass to send a reply automatically to every message received in your mailbox.

> *Reply Text:* If you selected the Reply Automatically checkbox, type the body of the message you want to send.

For the sake of brevity, we allow the description of each field to be a sentence fragment, rather than a full sentence. Try to make all the field descriptions follow a similar sentence structure, although this is not always possible.

If you need to add additional information to a fragment item, include it in a complete sentence in a subsequent paragraph. For example:

> *User ID:* A unique ID representing the user.

> Softarc recommends that you choose user ID's that are not related to user names . . .

General rules for field lists

Follow these rules for field lists.

- When a procedure requires the user to complete only one or two fields, use numbered steps to document the fields.

- When a procedure requires the user to complete three or more fields, use a non-bulleted list, and format the fields as list entry (no bullet).

- When a procedure requires the user to complete three or more fields, include an introductory sentence or fragment, ending in a colon.

- Try to make the format of non-bulleted list items consistent, if possible.

Headings

There are four kinds of headings used in SoftArc documents. Heading 1's are used only at the beginnings of chapters. Heading 2's are for major subsections of chapters. Heading 3's and 4's are used for subsections of the next level. Try to avoid heading 4's if possible.

In order to preserve some kind of consistent flow in the documents, there is always some text between headings; there should never be an instance where a Heading 1 is immediately followed by a Heading 2 or a Heading 2 by a Heading 3. Also, avoid "widowed" headings wherever possible—there should never be only one heading of a particular type in a group. If you have written something that contains only one Heading 2 or Heading 3, the odds are that the heading isn't required. Find another one, or find a way to remove the widowed heading.

All headings should be in what's called "upstyle". The first letter of a heading should be capitalized in all instances; from then on, capitalize *only* proper nouns—things like product names, for example.

Lists

There are two basic types of lists in SoftArc documents—numbered lists and non-numbered lists.

Numbered lists

Numbered lists are easy. Use numbered lists for procedures to describe a series of steps the reader must work through in a certain order.

Always include an introductory sentence. The text introducing the list is always a complete sentence and ends with a period. Our usual introductory sentence is "To . . . , follow these steps."

Use the Numbered List First format for the first item in a procedure, and Numbered List Entry for all subsequent items in the procedure. For example:

To delete a privilege group, follow these steps.

1) On the administrator's desktop, double-click the Privilege Groups icon.

2) Double-click the icon for the privilege group you want to delete.

3) Choose File $\rightarrow$ Delete.

Occasionally, we may have numbered subentries, although we try to avoid them. In this situation, use the Numbered List Subentry First format for the first subitem within an item, and Numbered List Subentry for all subsequent subitems within the item. The items will be numbered (lettered?) a, b, c, and so on.

General rules for numbered lists

Follow these rules for numbered lists.

• Don't use a numbered list for a general list of items, such as a list of hardware requirements. Use a bulleted list instead.

• Never use sentence fragments. Your instructions in a procedure should always be complete sentences (except for field descriptions within a numbered step).

• Include an introductory sentence, ending in a period.

Non-numbered lists

There are two types of list items in the non-numbered category—bulleted and non-bulleted.

Bulleted lists

In a bulleted list, each item is preceded by a bullet (a dot, dash, or some other graphic element).

Always include an introductory sentence or sentence fragment, followed by a colon. You can use a complete sentence, or a sentence fragment such as "For example:".

This is an example of a bulleted list:

The following standard privilege groups are temporary groups:

- Command Line Users

- Macintosh Users

- Windows Users

If you need to add additional information to a fragment item, include it in a complete sentence in a subsequent paragraph. For example:

- when upgrading hardware or software

  If you are changing software to a newer release, you should do a complete backup first, in case there are any problems during the upgrade.

Bulleted lists of chapter sub-headings
On the first page of most chapters, we use a bulleted list to introduce the sub-headings within that chapter. The list appears after an introductory sentence such as "This chapter provides procedures on the following topics:". The cross-reference appears as a sentence fragment, in Paragraph text cross-reference format. HAVEN'T DECIDED YET HOW TO GET RID OF CAPS IN THE CROSS-REF: EITHER APPLY A LOWERCASE FORMAT? OR HYPERTEXT LINK? For an example, refer to the first page of "Formatting standards" on page 45.

Non-bulleted lists
In a non-bulleted list, each item is indented, but is not preceded by a bullet. For example, we display the fields that must be completed on a form as a non-bulleted list in our manuals. For more information, refer to "Field names" on page 47.

Non-bulleted lists of chapter headings
In the Introduction chapter of our manuals, we use a non-bulleted list to provide a small introduction to each chapter and appendix in the manual.

The cross-reference to the chapter name appears in the Title (Chapter) cross-reference style, and is followed by one or two sentences describing the contents of the chapter. For example:

SoftArc language ABCs (Chapter 2): contains a useful alphabetical list of tricky words and phrases, along with the spelling or treatment that we at SoftArc have agreed to use consistently.

General rules for non-numbered lists

Follow these rules for non-numbered lists. (For more information on non-numbered lists as they are used to describe fields, refer to "Field names" on page 47.)

- Don't use a non-numbered list for steps in a procedure. Use a numbered list instead.

- Include an introductory sentence or fragment, ending in a colon.

- Make sure the format of the list items is consistent.

    — If the first item is a complete sentence, all items must be complete sentences.

    — If the first item is a sentence fragment, all items must be fragments, starting with a lower case letter and ending with no punctuation.

- If you need to add additional information to a fragment item, include it in a complete sentence in a subsequent paragraph.

Notes and warnings

Throughout our documents, we use the designation *Warning* to draw attention to urgent information, and also the designation *Note* to distinguish additional helpful information. In the past, we have also used the designation *Important*, but have recently decided that this is not necessary.

Warning: Our new version of a warning looks like this. It presents information that helps the user prevent interruptions in service or loss of data. Use a warning to tell users that they must watch out for these warnings and make sure they understand them. To create a warning, copy

one from the Boilerplate conference or from elsewhere in the document (but make sure you don't copy an older version, in which the icon appears in the margin). Apply the Note character style to the word Warning.

Note: A Note looks like this. To create a note, apply the Paragraph style to the paragraph, and apply the Note character style to the word Note. Try to minimize your use of Notes; in general, if the information is useful, you can just include it in the previous paragraph, or in a paragraph of its own, without the Note designation.

Punctuation

Backslashes

Use a backslash (\ ), not a forward slash (/) in describing DOS directories and subdirectories. For example:

> The gateway log file is located in C:\FCMMGATE\LOGS.

Before screen shots

Use periods, not colons. Also, it is not usually necessary to insert a reference to the screen shot itself. For example:

> *Correct:* Click Save.

> *Incorrect:* Click Save. The Login form appears.

Brackets

Refer to .

Commas

Use commas to separate items in a prose list, even before the final *and*. (If one or more of the listed items contains commas of its own, you should use semicolons—this is fairly rare.) The comma before the final *and* is called a serial comma. For example:

> You can contact us via SoftArc Online, by fax, by Internet mail, by phone, and by mail.

Don't use a comma to connect two separate clauses that should be separated by a period or a semicolon. This error is called a comma splice. For example:

Correct: It's raining this morning. However, it should stop by noon.

Incorrect: It's raining this morning, however, it should stop by noon.

Dashes and hyphens

Never use two hyphens instead of a dash. Use hyphens, en dashes, and em dashes appropriately.

- A *hyphen* (-) is strictly for hyphenating words or line breaks. For more information, refer to .

- An *en dash* (–) is used between words indicating a duration, such as hourly time or months or years. Use it where you might otherwise use the word *to*. For example:

    The FirstClass course will be held on April 16–17, 1996.

    The en dash can be used with a thin space on either side of it, if you want a little room, but don't use a full space. In FrameMaker, to produce an en dash, press Option + hyphen.

- An *em dash* (—) is often used in a manner similar to a colon or parentheses, or it indicates an abrupt change in thought, or it's used in a spot where a period is too strong and a comma is too weak. For example:

    Whatever department you're in, you do some writing—e-mail, error messages, marketing material, training exercises, and so on.

    Don't add a space on either side of an em dash. In FrameMaker, to produce an em dash, press Shift + Option + hyphen.

For telephone numbers, use a hyphen, and no space, instead of parentheses to separate an area code from the rest of the phone number; for example, 905-415-7000.

Ellipses

Type three periods with one space before the first, after the last, and between each . . . like this. If the words that precede an ellipsis constitute a grammatically complete sentence, add a fourth period, with no space preceding the first.

Don't use the ellipsis character (for example, Option + semicolon in Microsoft Word) because it throws off the letter spacing of the previous word.

If you are referring to a menu command that contains an ellipsis, omit the ellipsis. For example, in FirstClass we should refer to the menu command New Message, not New Message...

Em dashes and en dashes

Refer to "Dashes and hyphens" on page 54.

Exclamation marks

In a SoftArc document, there are very few legitimate uses for exclamation or question marks, and multiples of these are *never* appropriate.

Hyphens

Refer to "Dashes and hyphens" on page 54.

In field names or menu commands

When referring to a field name or command that appears with punctuation, do not include the punctuation. For example:

Correct: Choose File → New.

Incorrect: Choose File → New...

Correct: Type the user name in the To field.

Incorrect: Type the user name in the To: field.

Parentheses

Don't add *(s)* to the end of a singular word to indicate that it might also be plural. Your readers will usually understand that they must repeat a procedure if necessary; if you're not sure, write it out in full. For example:

> *Correct:* Make the user a member of the appropriate group or groups as required.

> *Incorrect:* Make the user a member of the appropriate group(s) as required.

For telephone numbers, use a hyphen, and no space, instead of parentheses to separate an area code from the rest of the phone number; for example, 905-415-7000.

Periods

After a period, there should only be one space, not two. The Macintosh is not a typewriter, and will space words appropriately without your help. You may be surprised by this rule, and protest that you were taught to *always* type two spaces after a period. However, some professional writers consider this formatting as the easiest way to identify the writing of an amateur!

Quotation marks

These are used to indicate text that should be entered in a field; to avoid confusion, punctuation is placed outside quotes. Other instances are treated the same way for the sake of consistency. Use curly (or "smart") quotes in almost all text.

The only time you should use straight quotation marks or apostrophes is when giving an example of command line or similar text, or as symbols to indicate inches and feet. You can create these symbols using the Key Caps utility (on the Mac), or the Character Map (in Windows). For more information, refer to "Using Key Caps to insert symbols (on the Mac)" on page 104 and "Using Character Map to insert symbols (in Windows)" on page 104.

Slashes

Don't use a slash to replace *and* or *or*—use the full word. For example:

Correct: the hardware and software you are using

Incorrect: the hardware/software you are using

Similarly, don't use a slash to refer to a user who might be male or female—it's awkward and artificial. Use *he or she*, or rewrite the sentence to use the plural. For example:

Correct: Change the user's Information form so that he or she has a longer time limit.

Correct: Change users' Information forms so that they have a longer time limit.

Incorrect: Change the user's Information form so that he/she has a longer time limit.

Small caps

One thrust of the evolving SoftArc Style is that our literature should be more typographically sophisticated, our manuals more book-like—all of our text should look more like it was typeset and less like it was desktop published.

One aspect of this is the use of small capitals. Consider this quotation from *Forgotten Characters—an Adventure In Typographic Navigation*:

"Normally we use capital letters to begin sentences and proper names, and occasionally we set titles or words in all capitals. However, when a word is set entirely in capitals with a body of upper and lowercase letters, it is so large that it jumps out of the text. From the earliest printing with roman characters, a special version of capitals (small capitals), which are optically about the same size as the x-height of the lowercase letters, was used for this purpose. The weight of these small capitals is designed to harmonize with the weight of the lowercase."

In the SoftArc style, we also use initial capital letters as emphasis in such things as field names, form names, and product names; and more capital letters could only distract from this.

However, there are certain situations in which small caps are not ideal. For instance, some small-capped acronyms (such as SCC) look as if they've been set in lower case, because there is little to distinguish a lower case s and a lower case c form the small-capped counterparts. Another problem is when the eye encounters familiar mixtures of words and acronyms such as Mac OS or Windows NT.

We will have to research the standard for such exceptional cases. In the meantime, however, we have made the OS in Mac OS full caps.

Special formatting

Italics

When selecting a word to italicize, make sure to select the space before the word, as well as the word itself; don't select the space after the word. Italics take up less space than non-italic characters, and this can create a distracting bit of space before the italic word unless that space is italicized as well.

Underlining

Don't. Italicize for emphasis.

Tables

As described in , there are only two table formats used in our FrameMaker templates—icon tables, used to display an icon and its meaning, and generic tables, used for everything else. We usually introduce a table with a sentence such as "The following table lists . . .". In general, if the meaning is obvious, we omit table headers.

Use the same format in icon tables as for field descriptions (the icon name in field name character style, followed by a colon, and then fragments with initial caps and periods).

For tables with just two or three words of description or explanation, and for sentence fragments in tables, do not capitalize the first word, and do not use periods.

For examples of how we use tables, refer to . For an example of a table that needs headers to be understandable, refer to .

Text alignment

To align text, use tabs whenever possible, rather than spaces.

Widows and orphans

In the world of page formatting, widows and orphans are awkward short lines of text that have been separated from the main block of text by a line break or page break. A widow is sometimes defined as a first line of a paragraph that is split from the rest of the paragraph by a page break; an orphan is the last line of a paragraph split from the rest of the paragraph by a page break. A widow can also occur when a paragraph ends and leaves fewer than seven characters on the last line.

Although our FrameMaker templates are designed to avoid both widows and orphans, watch for them just in case they slip by. To fix a widow or orphan, you may need to add or delete a word or two, or take spacing out of the letters or words, depending on the situation.

You can also change the Widow/Orphan Lines field in the Pagination section of the Paragraph Designer. Don't forget to notify the keeper of the templates, so that the standard templates can also be updated.

If you do spot widows or orphans in a SoftArc document, don't ignore them—they're tacky.

Folder and file naming standards

To help us keep track of the many folders and files we create in the Documentation and Design department, we have established several conventions on how to name folders and files. This chapter provides information on the following topics:

- General tips

- Naming folders

- Naming files

General tips

Names of document files, graphics and illustrations in SoftArc documents should follow a defined pattern. This makes it much easier when converting a document into Acrobat format or when trying to update an old manual.

According to the FrameMaker manual, the pathname that FrameMaker stores for a file reference or imported file is usually relative. That is, it shows the location relative to the folder or directory of the document containing the reference. However, if FrameMaker has to traverse the root of the file system when building the pathname, it uses an absolute pathname.

Because FrameMaker stores relative pathnames wherever possible, it will continue to find a references file if you move the document and its associated files to a different folder—as long as you keep the files in the same relative locations. And if you save the document in a different folder or directory, FrameMaker adjusts the pathnames accordingly.

When editing, revising, or even just looking at an old manual, it is often important to be able to find an old set of illustrations, imported by reference into the document. It is also useful to be able to get some idea of what a Photoshop file is a shot *of* just by looking at the filename. Accordingly, there are some standards for naming and locating illustrations.

- The illustrations for a particular manual should be included in one or more folders at the same level as the chapters for that manual.

- These folders should contain all the illustrations that appear in the manual, including—if necessary—copies of generic illustrations and

illustrations in other manuals. Under no circumstances should a manual contain an illustration from a folder someplace else on the disk. The extra hard disk space required to store two copies of an illustration used in two manuals is small; the problems caused by duplicating or moving a manual without all of its illustrations can be quite large. The need to update such an illustration in two places will likely be infrequent.

Naming folders

The folders should be named to indicate which platform they're particular to:

- " Illustrations-Mac"

- " Illustrations-Windows"

- " Illustrations-UNIX"

- " Illustrations-DOS"

- " Illustrations-Generic"

Generic illustrations must be identical in all platform versions of a manual, including any text that might appear.

Note: Type a leader space in the folder names to ensure that they appear at the top of file lists, and aren't lost among the chapter titles.

Naming files

Each individual illustration file should contain a prefix indicating which platform it is particular to:

- "M-" for Macintosh

- "W-" for Windows

- "U-" for UNIX

- "D-" for DOS

- "G-" for generic

If possible, illustration files should have the same name that appears in the title bar that appears in the illustration. If there is no title bar in the illustration, name the file after the first significant text that appears in the illustration. If either of these approaches yield duplicate filenames, append additional text from the illustration or an incredibly short description of what makes the illustration unique.

FrameMaker book standards

Writing is a tricky thing. Particularly when it comes to technical writing, and *especially* when we're dealing with software, where it's extremely important that the reader understand exactly what he or she has to do in order to make the damn thing work.

When writing a SoftArc document, it is important to remember who the audience for the manual or leaflet is. In many cases, readers will be people with very little knowledge of computers, and—initially—almost no understanding of FirstClass and how it works. Calls to Tech Support seem to indicate that as many as one-third of FirstClass administrators are not familiar with the computers on which their systems are running. Those are the people for whom we are writing, not the high-tech power users who may not even crack the manuals at all.

This chapter describes the standards we use for our FrameMaker files.

The book file

All SoftArc manuals should have certain characteristics in common. A customer who has spent good money on a few SoftArc products should have some idea, when opening the manual for a new purchase, where he or she is likely to find what. Most of this is fairly basic.

At SoftArc we use FrameMaker as our desktop publishing software. For each there is a FrameMaker book file, consisting of five separate files:

- The Front Matter file

- The table of contents file

- The body text file

- The glossary file

- The index file

The Front Matter file

All SoftArc manuals begin in essentially the same way. The first page, on opening the cover, should be a title page with the name of the product and the version information, including the platform on which the product runs.

On the back of the title page is the copyright page, including the date and version number, and a listing of all trademarks and registered trademarks included in the document. For information on the phrasing of trademarks, refer to Appendix C, "Trademarks".

(Incidentally, some of our manuals include a catch-all sentence such as: "All product names or brand names are trademarks or registered trademarks of their respective holders." We should provide a proper trademark list for these manuals whenever they are due for revision.)

The table of contents file

The table of contents is generated automatically, using FrameMaker, and can be several pages long.

The body text file

Now that we are using FrameMaker 5, we have established a standard format for the main part of the book, the body text file. The body text file contains all the information and procedures for the manual, other than the Front Matter, the table of contents, the glossary, and the index.

(Some of our older books were divided into more than five files. If you are working on a revision of one of these older FrameMaker books, you will have to combine some of the files to create one body text file. For information on how to do this, refer to "Combining the chapter files" on page 71.)

Introduction

Immediately following the table of contents, there is a chapter called "Introduction". It includes the following information and headings:

- several paragraphs that outline the purpose and uses of the product

- *Other documentation* (optional)
  A listing of other related books in the FirstClass suite.

- *Who should read this guide*
  One or two paragraphs describing who should read this guide (the pur-
  pose of which is to ensure that readers don't waste any time if it's not
  what they want).

- *What's new in this guide* (optional)
  A listing of new features, enhancements, and changes (include only if
  this manual is a revision of an earlier manual).

- *Inside this guide*
  A listing of the name of each chapter and appendix, and a brief descrip-
  tion of what it contains.

- *Symbols and conventions*
  A description of the Warning symbol and the Note, Folder and confer-
  ence names, *Entering data* (the way in which variables are described),
  Choosing menu commands (the arrow method for describing menu
  choices), *Choosing alternatives* (the way in which the manual handles
  several different ways of performing the same action), and *Samples and
  illustrations* (the way in which the manual uses Veritec examples).

- See the following four optional chapters. If you have a small amount of
  Information that fits any of those headings, but not enough to justify
  creating a whole chapter, consider including it as a level two heading
  in this introductory chapter.

A typical scenario (optional)

This is an optional chapter used to introduce the reader to the workings of
the product through an example. So far we've used it primarily in gateway
documents.

Basic concepts (optional)

This is another optional chapter to introduce the reader to the basic con-
cepts they need to know before proceeding. It differs from the Getting
Started chapter in that it contains concepts and not procedures.

Installation (optional)

This chapter is only required for products that do not have separate installation manuals (such as *FirstClass Gateway for cc:Mail*).

The following two headings, that used to appear earlier in the manuals, have now been moved to the end of the Installation chapter:

- Registering your software

- Obtaining software upgrades

If the manual does not include installation instructions, these two sections should not appear in the manual either.

Getting started (optional)

Another optional chapter that contains the first things you can do, after installing the software, as opposed to the basic concepts you should know. Simpler applications such as gateways require very little to get started and that information can be easily accommodated elsewhere.

Procedure chapters

These are the chapters that describe how you use the software after it has been installed. For example:

- configuring

- using

- managing

and so on.

Troubleshooting

After the procedure chapters of the manual, the last chapter gives information on troubleshooting. It lists possible problems and troubleshooting tools and techniques. The order should be:

- troubleshooting tools and techniques, if applicable (differs from manual to manual, but includes such topics as Troubleshooting using trace

information, Troubleshooting modem problems, possible problems, and so on.)

- error messages (if applicable; in some manuals, we would just refer the reader to the *Using* or *Administering* manuals)

- Obtaining technical support. The methods (in the order in which they should be included) are:

  — via SoftArc Online

  — by fax

  — by Internet mail

  — by phone

  — by mail

You can find the text for "Obtaining technical support" in our boilerplate conference but double-check the information to make sure it is still current.

Appendices

After the Troubleshooting chapter, there may be one or more appendices. There might be appendices on keyboard shortcuts, advanced information and procedures that don't belong in the main part of the book, and so on.

The glossary file

Although we haven't done this consistently in the past, we want to start including a glossary appendix in most manuals.

We've created a main glossary including all the definitions we can think of, from which each individual manual would draw its own applicable glossary items. This main glossary document is called Glossarus Maximus, and is kept Glossarus Maximus is conditionalized for each manual that we produce.

Unlike the other appendices, the glossary is in a file of its own, rather than in the body text file, because of the conditionalization issue.

The index file

In general, FrameMaker does a good job of generating the index for a manual. There are, however, a number of details that you should always check.

- Ensure that there is an index entry for every procedure, and for every menu command.

- There should be no more than two levels of entry.

- The first word of every main entry must be capitalized. The first word of every sub-entry should be lower case.

- Just as in text, field names should be capitalized in an index as if they are titles—capitalize everything except prepositions. All field names should end in *field*.

- Similarly, all entries on menu commands should end in *command*, all applications should end in *application*, and so on.

- Where appropriate, make sure that the index includes ranges of pages, rather than just the page on which the reference begins.

- In an index, all nouns should be pluralized, unless doing so makes them nonsensical.

- Verbs should end in *ing*.

- *See* and *See also* entries should be italicized, and should appear at the end of the list of subentries, with the marker <$nopage>.

- At the end of the index, there should be a last page. This is blank, with the part number in the lower left corner.

Using our templates

We have created a standard template to be used for our printed documentation. The template is stored in D - and - D → Customer Documentation → Templates → Template5 on the Database volume.

If you find any errors in the template, feel free to update your copy of the template. But be sure to notify the keeper of the templates, so that the standard templates can also be updated.

For information on the individual paragraph and character styles, as well as cross-reference formats and other details, refer to Appendix B, "Maintaining the glossary". For information on Acrobat templates, refer to "How Acrobat templates differ from regular ones" on page 257.

This chapter provides procedures on the following topics:

- Applying the template to an existing book

- Creating a new book

- Generating and formatting a book

Applying the template to an existing book

If the chapters of the book you are updating are not all in the same file, you must first combine them into one file.

This section provides procedures on the following topics:

- Combining the chapter files

- Applying new formats to the body file

- Applying the formats to the Front Matter

- Applying the formats to the table of contents

- Applying the formats to the index

Combining the chapter files

To simplify the creation and maintenance of documents, Documentation and Design has standardized the document structure. Each book should

consist of a Front Matter file, a table of contents file, a body file containing all of the chapters, a glossary file, and an Index file.

If the chapters of the book you are working with are in separate files, follow the steps in this section to combine them. Otherwise, skip to .

1) First, create a copy of the folder containing the document you are working with, by selecting the folder and choosing File → Duplicate.

2) In the copy folder, open the first file in the document, usually called Introduction or About this guide.
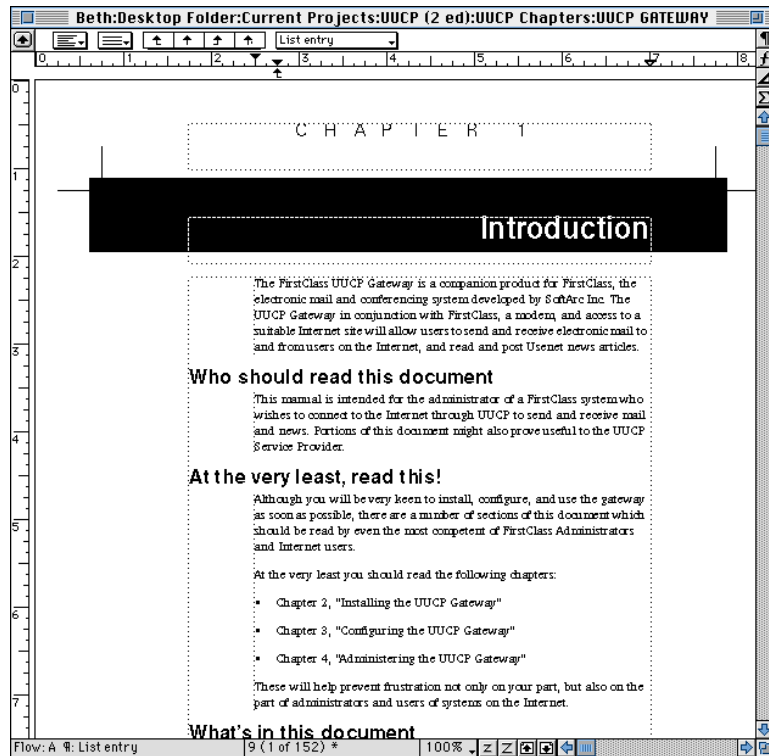
3) This file will form the basis for your new single-file FrameMaker docu-
ment. Choose File → Save As, and give the new file an appropriate
name. Here, we've used the name "Fax Gateway."
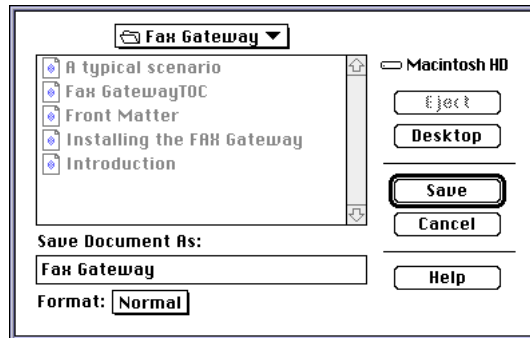
Be sure to save this file in the same folder as the file you opened in
.

4) Move to the very end of this file and place the cursor there.

5) Choose File → Import → File.
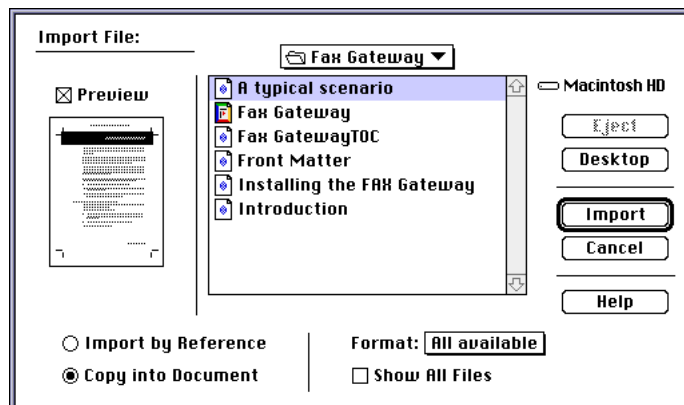
6) Select Copy Into Document.

7) Select the next file in the FrameMaker document and click Import.

```
┌─────────────────────────────────────────────┐
│ ≡≡≡≡≡     Import Text Flow by Copy    ≡≡≡≡≡   │
│                                               │
│  Source:  ...:Fax Gateway:Fax GatewayTOC      │
│  Flow to Import:                              │
│  ◉ Body Page Flow:       [ A (Main Flow)  ▼ ] │
│  ○ Reference Page Flow:  [ A             ▼ ]  │
│                                               │
│  Formatting of Imported Flow:                 │
│ ┌───────────────────────────────────────────┐│
│ │ ◉ Reformat Using Current Document's Formats││
│ │    While Importing, Remove:                ││
│ │     ☐ Manual Page Breaks                   ││
│ │     ☐ Other Format Overrides               ││
│ │ ○ Reformat as Plain Text                   ││
│ │ ○ Retain Source's Formatting               ││
│ └───────────────────────────────────────────┘│
│  ─────────────────────────────────────────    │
│  ( Import )      ( Cancel )        ( Help )    │
└─────────────────────────────────────────────┘
```
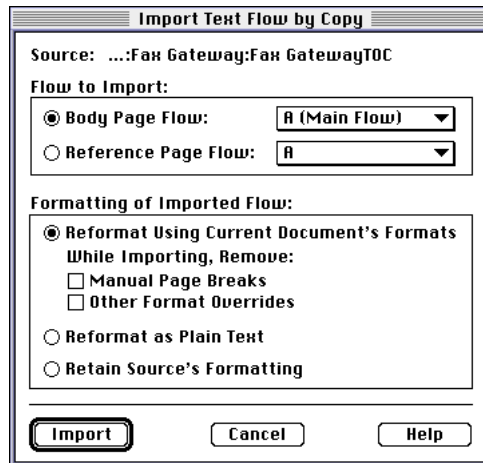
8) Ensure that Body Page Flow A (Main Flow) is selected.

9) Select Retain Source's Formatting.

10) Click Import.

    The chapter is inserted after the end of the first chapter.
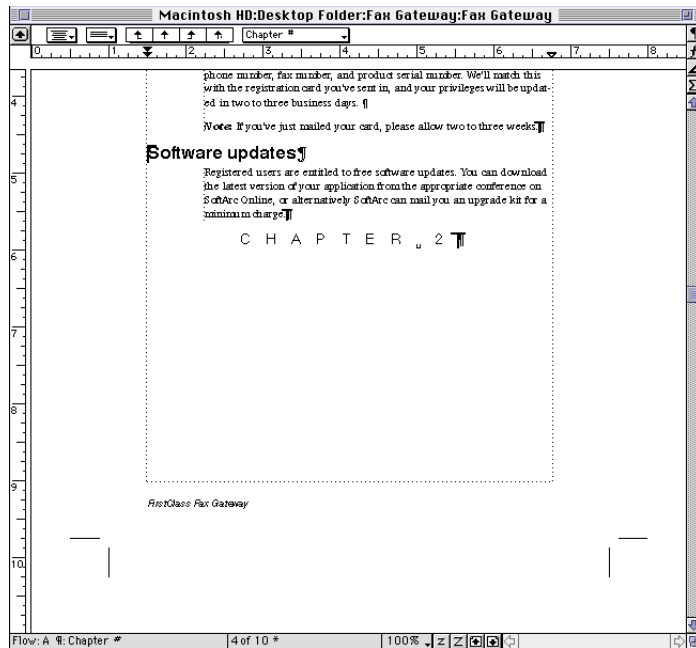
11) Place the cursor in front of the chapter heading and choose Special →
Page Break.
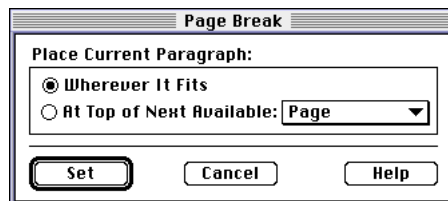
Note: The Chapter # may contain a cross-reference tag. Take care
when placing the page break that you do not end up with the tag and
the paragraph on two separate pages.

12) For At Top of Next Available, select Page. Then, click Set.

13) To apply the appropriate master page to this, choose Format → Page
Layout → Master Page Usage.

```
┌─────────────────────── Master Page Usage ───────────────────────┐
│                                                                  │
│  Use Master Page:                                                │
│  ● Right/Left                                                    │
│  ○ Custom: [ None              ▼ ]                               │
│                                                                  │
│  Apply To:                                                       │
│  ● Current Page (iii)                                            │
│  ○ Pages: [ i    ]  To: [ iu ]    First Page: i                 │
│                                   Last  Page: iu                 │
│     ⊠ Even (Left)   ⊠ Odd (Right)                               │
│     □ That Currently Use Master Page: [ None         ▼ ]        │
│                                                                  │
│   ╔════════╗      ┌────────────┐        ┌────────────┐          │
│   ║ Apply  ║      │   Cancel   │        │    Help    │          │
│   ╚════════╝      └────────────┘        └────────────┘          │
│   (No Undo)                                                      │
└──────────────────────────────────────────────────────────────────┘
```
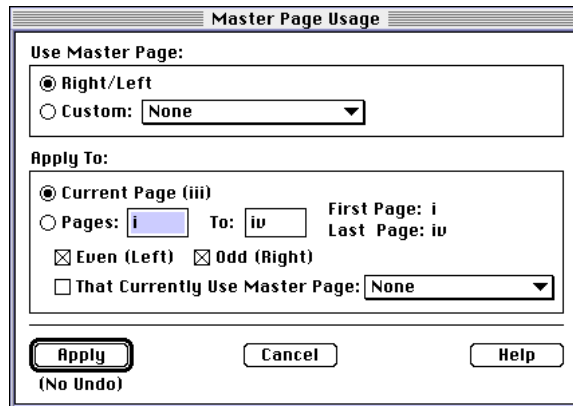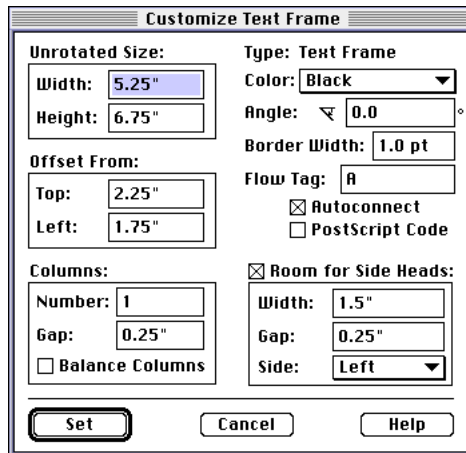
14) For Custom, select First.
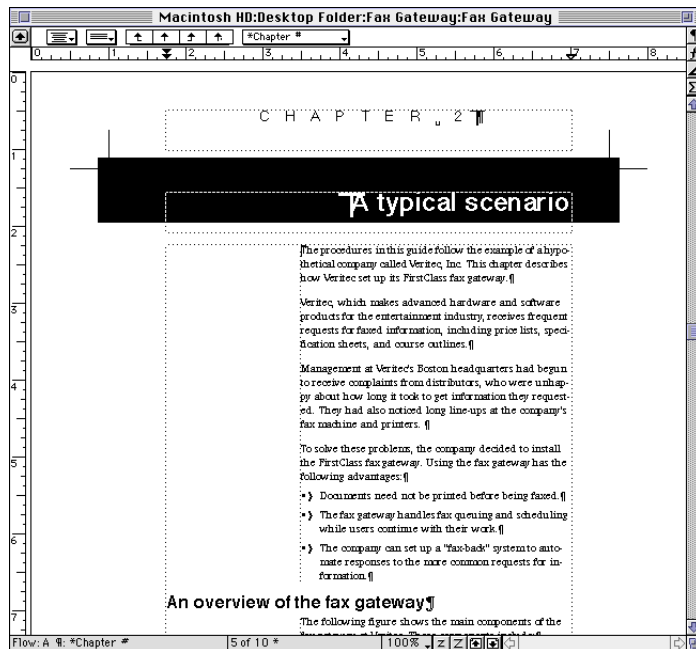
15) If the text column is too narrow, follow these steps to correct it.

    a.   Choose View → Master Pages.

b.   Select the text column on the master page by pressing the Option
     key while clicking on the text column.

c.   Choose Format → Customize Layout → Customize Text Frame.

Customize Text Frame
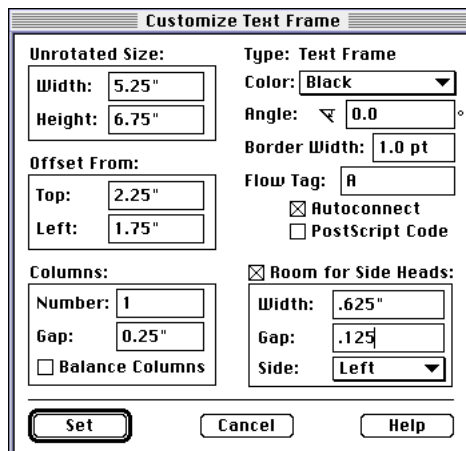
Unrotated Size:

Width: 5.25"

Height: 6.75"

Offset From:

Top: 2.25"

Left: 1.75"

Columns:

Number: 1

Gap: 0.25"

☐ Balance Columns

Type: Text Frame

Color: Black ▼

Angle: ⊽ 0.0 °

Border Width: 1.0 pt

Flow Tag: A

☒ Autoconnect

☐ PostScript Code

☒ Room for Side Heads:

Width: 1.5"

Gap: 0.25"

Side: Left ▼

(Set)   (Cancel)   (Help)

d.   In the Width for Side Heads box, for Width enter .625 and for Gap
     enter .125.

Customize Text Frame

Unrotated Size:

Width: 5.25"

Height: 6.75"

Offset From:

Top: 2.25"

Left: 1.75"

Columns:

Number: 1

Gap: 0.25"

☐ Balance Columns

Type: Text Frame

Color: Black ▼

Angle: ⊽ 0.0 °

Border Width: 1.0 pt

Flow Tag: A

☒ Autoconnect

☐ PostScript Code

☒ Room for Side Heads:

Width: .625"

Gap: .125

Side: Left ▼

(Set)   (Cancel)   (Help)

e.   Click Set.

f.   Repeat these steps for each master page.

16) Repeat step 4 to step 14 for each chapter of the FrameMaker document.

Creating the internal links

At this stage in the procedure, the existing links in the single-file
FrameMaker document are still pointing to the individual chapter files.
Now you need to sever those links and re-establish them internally. Follow
these steps.

1)   Remove the individual chapters from the folder containing the single-
     file document. You can, if you wish, delete them at this point. Do not,
     however, remove or delete the folder containing the illustrations.

2)   Open the single-file FrameMaker document.

3)   Choose Edit → Update References.
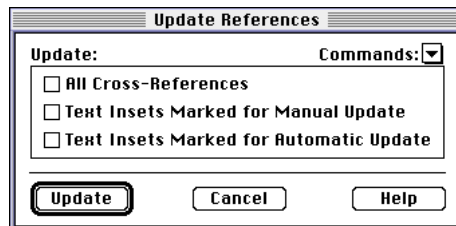
4)   Select All Cross-References and click Update.

Update Unresolved Cross-References

Total of 7 Unresolved   For Cross-References to Selected File,
Cross-References to   Look **In:**
Files Named: 🗁 **Fax Gateway** ▼

| Current | | 📄 Fax Gateway | | ⬜ Macintosh HD |

Current
A typical scenario
Installing the FA...
Administering th...
Using the FAX Ga...
Troubleshooting
Error codes

📄 Fax Gateway

⬜ Macintosh HD

Eject

Desktop

Update

Done

Help

0 Unresolved Cross-References
to File: Macintosh HD:...:Fax Gateway:Fax Gateway

The list on the left contains the documents currently pointed to by the document's links. These are the documents you've removed from the folder so they could not be found. Instead of pointing to these documents, you want FrameMaker to search for the appropriate cross-reference tags in the single-file document you've created. The tags are all there, it's just a matter of telling FrameMaker where to look for them.

5) For each document in the leftmost list (except, of course, current) select the document, select the single-file document from the list on the right, and click Update.

Once the cross-references to a particular document are resolved, that document is removed from the rightmost list.

6) Once Current is the only file remaining on the rightmost list, click Done.

```
Update Unresolved Cross-References

Total of 0 Unresolved        For Cross-References to Selected File,
Cross-References to          Look In:
Files Named:                   🗁 Fax Gateway ▼

┌─────────────────┐  ┌─────────────────────────┐   ▭ Macintosh HD
│ Current       ⇧ │  │ 📄 Fax Gateway       ⇧ │
│                 │  │                         │     ┌──────────┐
│                 │  │                         │     │  Eject   │
│                 │  │                         │     └──────────┘
│                 │  │                         │     ┌──────────┐
│                 │  │                         │     │ Desktop  │
│                 │  │                         │     └──────────┘
│                 │  │                         │     ┌──────────┐
│                 │  │                         │     │  Update  │
│               ⇩ │  │                      ⇩ │     └──────────┘
└─────────────────┘  └─────────────────────────┘     ┌──────────┐
                                                      │   Done   │
0 Unresolved Cross-References                         └──────────┘
to File: Macintosh HD:...:Fax Gateway:A typical scenario  ┌──────────┐
                                                      │   Help   │
                                                      └──────────┘
```
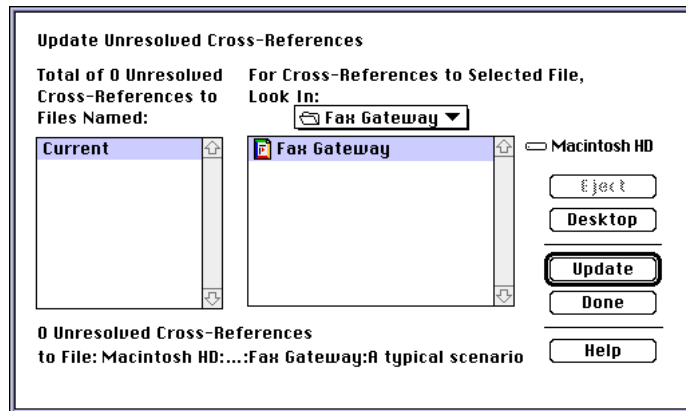
You are returned to the Cross-Reference dialog.

7) Click Done.

Applying new formats to the body file

Before you apply new formats to the body file, choose Conditional Text
from the Special menu, choose Show/Hide and then Show All. This will
show all of your conditional text and ensure that everything will be
updated. To apply new formats to the body file, follow these steps.

1) Open Template.doc.

2) Switch to the body text file.

3) In the body text file (not the template file!) delete all paragraph for-
   mats from the catalog.

4) Delete all character formats from the catalog.

5) View the reference pages, and delete all reference pages except the Ref
   page.

6) Delete all conditional text formats except Macintosh, Windows, and
   UNIX.

7) Delete all table formats except Generic table and Icon table. (Delete table formats from the Table Designer. To display it, choose Table → Table Designer.)

8) Choose File → Import → Formats.

```
┌─────────────────────────────────────────────────────────┐
│═══════════════════ Import Formats ═══════════════════════│
│                                                           │
│  Import from Document: │Current              ▼│           │
│  Import and Update:                                       │
│  ┌─────────────────────────────────────────────────────┐ │
│  │ ⊠ Paragraph Formats   ⊠ Reference Pages             │ │
│  │ ⊠ Character Formats    ⊠ Variable Definitions        │ │
│  │ ⊠ Page Layouts        ⊠ Cross-Reference Formats      │ │
│  │ ⊠ Table Formats        ⊠ Conditional Text Settings    │ │
│  │ ⊠ Color Definitions    ⊠ Math Definitions             │ │
│  └─────────────────────────────────────────────────────┘ │
│                                                           │
│  While Updating, Remove:                                  │
│  ┌─────────────────────────────────────────────────────┐ │
│  │ ☐ Manual Page Breaks  ☐ Other Format/Layout Overrides│ │
│  └─────────────────────────────────────────────────────┘ │
│                                                           │
│         ( Import )   ( Cancel )   ( Help )                │
│           (No Undo)                                       │
└─────────────────────────────────────────────────────────┘
```
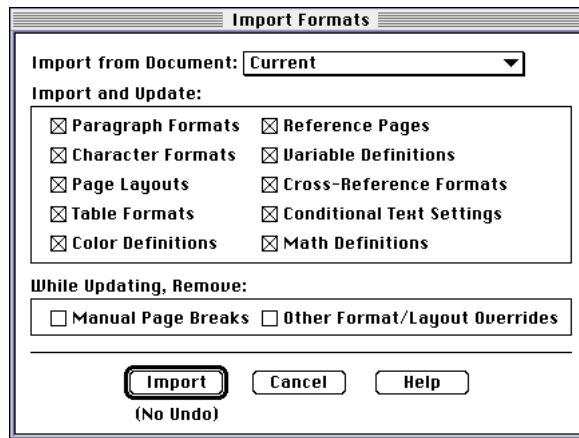
9) For Import From Document, select Template.doc.

10) Ensure that all Import and Update options are selected.

11) Click Import.

12) View the Master pages and delete all Master pages except First, Left, and Right. If you can't delete a Master page because it is being used by a body page, display that body page and assign it one of the standard Master pages. Then delete the Master page.

13) If a dialog appears asking if you want to keep or delete overrides to master pages, delete the overrides.

14) Search for all cross-references and change them to one of the standard formats:

— Chapter n, "Title"

— page n

— Paragraph text

— step n

— step n on page m

— Title (Chapter)

— "Heading" on page n

15) Then, delete all non-standard cross-reference formats.

16) Display the variables, and delete all user variables except Edition, Part Number, Platform, Title, and Version.

   Note: The system variables are listed first, and you cannot delete them. To display the list of user variables, select the last variable in the list, and click Edit Definition.

17) Customize the variables for your document. You can find the part number in the Documentation & Design filing cabinet, or in the Database volume.

18) Convert old paragraph formats to the new format.

   The following table lists the obsolete formats and the format to which they should be converted.

Obsolete format	New format
Heading—Fields, etc.	Heading 4
List end	List entry
List end (no bullet)	List entry (no bullet)
List sub end	List sub entry
List sub end (no bullet)	List sub entry (no bullet)
Note—in para	Paragraph. Insert the *Note:* text manually.

Note—in list	List entry (no bullet). Insert the ***Note:*** text manually.
Paragraph before list	Paragraph
Picture—in list	List entry (no bullet)
Picture—in list end	List entry (no bullet)
Picture—in paragraph	Paragraph
Important—in margin	Format as a Warning or Note, as appropriate.

The easiest way to change paragraph formats follows.

a.   Find a paragraph with the format you want to change.

b.   Display the Paragraph Designer.
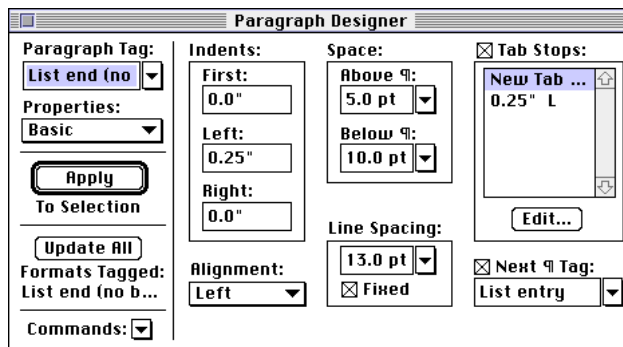
c.   For Paragraph Tag, enter the name of the new tag, such as List entry (no bullet).

d.   For Commands, select Global Update Options.

```
┌─────────────────────────────────────────┐
│ ═══════ Global Update Options ═══════    │
│                                          │
│ Use Properties in the Paragraph Designer:│
│    ○ All Properties                      │
│    ◉ Basic Properties Only               │
│ Update Paragraph Formats:                │
│    ○ All Paragraphs and Catalog Entries  │
│    ○ All Matching Tags in Selection      │
│    ◉ All Tagged:  List end         ▼    │
│                                          │
│    ┌─────────┐  ┌────────┐  ┌────────┐  │
│    │ Update  │  │ Cancel │  │  Help  │  │
│    └─────────┘  └────────┘  └────────┘  │
└─────────────────────────────────────────┘
```
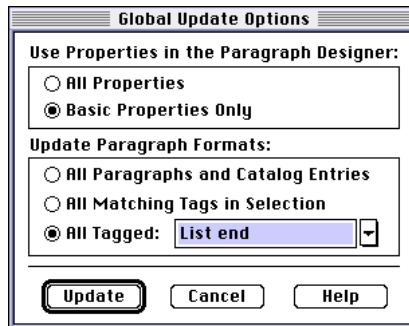
    e.   Select All Properties.

    f.   For All Tagged, type the obsolete paragraph format you are chang-
ing.

    g.   Click Update.

    h.   Click Update All.

    i.   Repeat these steps for each obsolete format you find.

19) Search for all occurrences of a.m. or A.M. and change them to the new
format: A.M.

20) Close the file and save the changes.

Applying the formats to the Front Matter

To apply the new formats to the Front Matter, follow these steps.

1) Open Front template.

2) Open the Front Matter file.

3) In the Front Matter file (not the template file!) delete all paragraph for-
mats from the catalog.

4) Delete all character formats from the catalog.

5) View the reference pages, and delete all reference pages except the Ref page.

6) Delete all conditional text formats except Macintosh, Windows, and UNIX.

7) Delete all table formats except Generic table and Icon table. (Delete table formats from the Table Designer. To display it, choose Table → Table Designer.)

8) Choose File → Import → Formats.

9) For Import From Document, select Front template.

10) Ensure that all Import and Update options are selected.

11) Click Import.

12) View the Master pages and delete all Master pages except First, Left, and Right. If you can't delete a Master page because it is being used by a body page, display that body page and assign it one of the standard Master pages. Then delete the Master page.

13) Delete all non-standard cross-reference formats.

14) Display the variables, and delete all user variables except Edition, Part Number, Platform, Title, and Version.

   Note: The system variables are listed first, and you cannot delete them. To display the list of user variables, select the last variable in the list, and click Edit Definition.

15) Customize the variables for your document.

16) Apply the new paragraph formats to the appropriate paragraphs in the document.

17) Close the file and save the changes.

Applying the formats to the table of contents

To apply the new formats to the table of contents, follow these steps.

1) Open the table of contents file.

2) In the TOC text file (not the template file!) delete all paragraph formats from the catalog.

3) Delete all character formats from the catalog.

4) View the reference pages, and delete all reference pages except the Ref page.

5) Delete all conditional text formats except Macintosh, Windows, and UNIX.

6) Delete all table formats except Generic table and Icon table. (Delete table formats from the Table Designer. To display it, choose Table → Table Designer.)

7) Open TOC template.

8) Switch to the TOC document.

9) Choose File → Import → Formats.

10) For Import From Document, select TOC template.

11) Ensure that all Import and Update options are selected.

12) Click Import.

13) View the Master pages and delete all Master pages except First, Left, and Right. If you can't delete a Master page because it is being used by a body page, display that body page and assign it one of the standard Master pages. Then delete the Master page.

14) Delete all non-standard cross-reference formats.

15) Display the variables, and delete all user variables except Edition, Part Number, Platform, Title, and Version.

16) Customize the variables for your document.

17) Close the file and save the changes.

Applying the formats to the index

To apply the new formats to the index, follow these steps.

1) Open the index file.

2) In the index file (not the template file!) delete all paragraph formats from the catalog.

3) Delete all character formats from the catalog.

4) View the reference pages, and delete all reference pages except the Ref page.

5) Delete all conditional text formats except Macintosh, Windows, and UNIX.

6) Delete all table formats except Generic table and Icon table. (Delete table formats from the Table Designer. To display it, choose Table → Table Designer.)

7) Open IX template.

8) Choose File → Import → Formats.

9) For Import From Document, select IX template.

10) Ensure that all Import and Update options are selected.

11) Click Import.

12) View the Master pages and delete all Master pages except First, Left, Right, and Last Page. If you can't delete a Master page because it is

being used by a body page, display that body page and assign it one of the standard Master pages. Then delete the Master page.

13) Delete all non-standard cross-reference formats.

14) Display the variables, and delete all user variables except Edition, Part Number, Platform, Title, and Version.

15) Customize the variables for your document.

16) Close the file and save the changes.

Creating a new book

To create a new book with the standard template, you must perform the following procedures:

- Creating a new Front Matter file

- Creating a new body file

- Creating a glossary file

- Creating a book file

- Adding a table of contents

- Adding an index

- Adding the Front Matter and glossary

Creating a new Front Matter file

To create a new Front Matter file, follow these steps.

1) In the Finder, create a folder for the new book.

2) From the FrameMaker menu, choose File → New.

   FrameMaker prompts you to select a template.
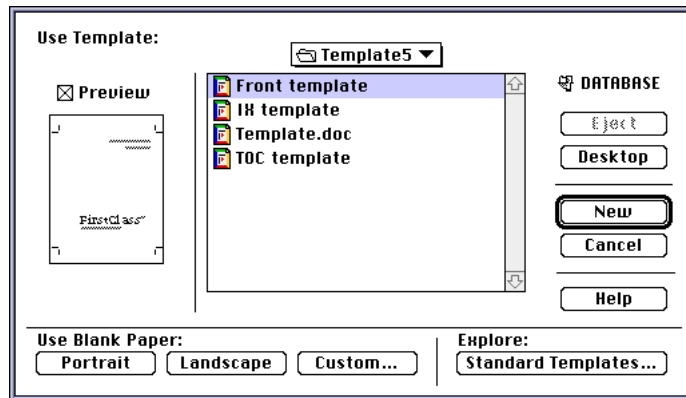
3) Select Front template.

A file named Untitled Front template opens.

4) Choose File → Save As.
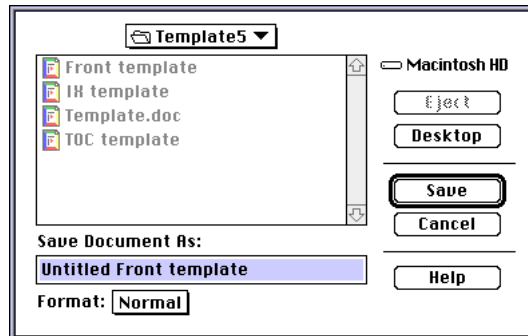
5) Select the folder you created in step 1, and enter the filename Front Matter.

6) Customize the variables for your document.

Creating a new body file

To create a new body file, follow these steps.

1) From the FrameMaker menu, choose File → New.

   FrameMaker prompts you to select a template.
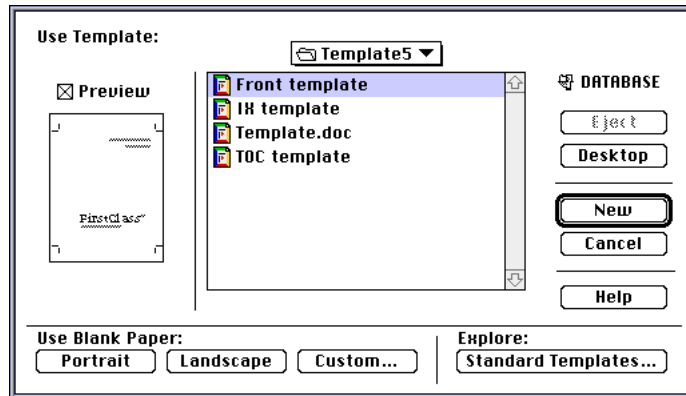
2) Select Template.doc.

   A file named Untitled Template.doc opens.

3) Delete all text from this file.

4) Customize the variables for your document.

5) Choose File → Save As.
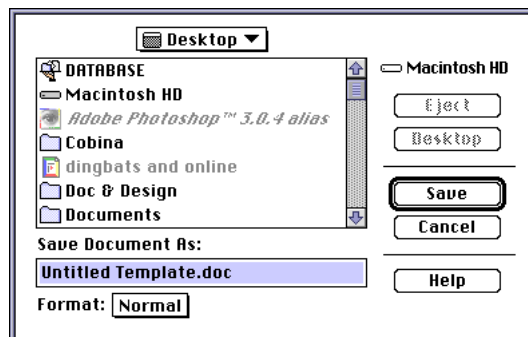
6) Select the folder in which you want to store the new book, and enter the name of the new body file.

Creating a glossary file

To create a new glossary file, follow these steps.

1) From DATABASE, make a copy of Glossarus Maximus on your desktop.

2) Rename this file "Glossary File".

3) Drag the glossary file to your book folder.

4) Open the file.

5) Choose Special → Conditional Text.
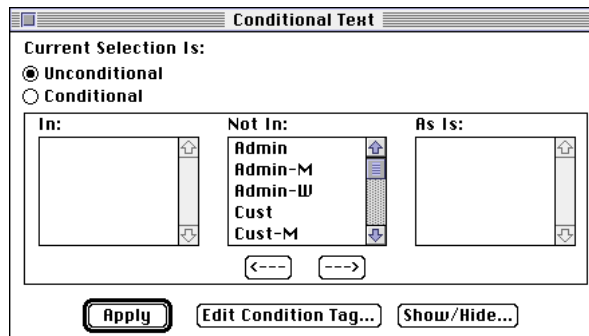
6) Click Show/Hide.
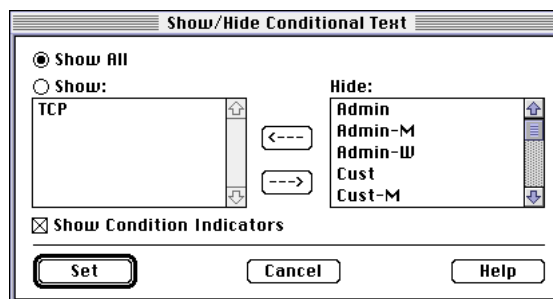
7) Click Show.

8) Double-click on any setting in the Show column to move it to the Hide column.

9) Double-click on the appropriate conditions in the Hide column to move them to the Show column. For example, if you are writing the manual for *Installing FirstClass*, double-click on Inst, Inst-M, and Inst-W. (The Inst condition identifies all non-platform specific definitions related to installation. The Inst-M and Inst-W conditions identify definitions that apply only to Macintosh or only to Windows; when you are ready to print the document, you would hide one or the other.)
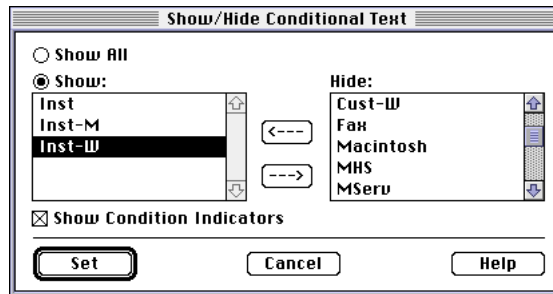
10) Click Set.

Applying the template to the glossary file

1) Open the body file document (not template).

2) Click on the glossary to make it active.

3) Repeat step 3 to step 6 on page 98, selecting the Body file document instead of the TOC template.

4) Close the files and save the changes.

Creating a book file

To create a new book file, follow these steps.

1) Choose File → Generate/Book.

```
╔═══════════════════════════════════════╗
║  ≡≡≡≡≡≡≡≡≡≡  Generate/Book  ≡≡≡≡≡≡≡≡≡  ║
║                                         ║
║  ⦿ List:    │ Table of Contents    ▼ │ ║
║                                         ║
║  ○ Index:  │ Standard Index        ▼ │ ║
║                                         ║
║  ○ New Multifile Book, Including:       ║
║      Installing FC.doc                  ║
║  ─────────────────────────────────────  ║
║  ╔═══════════╗  ┌──────────┐  ┌───────┐ ║
║  ║ Generate… ║  │  Cancel  │  │ Help  │ ║
║  ╚═══════════╝  └──────────┘  └───────┘ ║
╚═══════════════════════════════════════╝
```
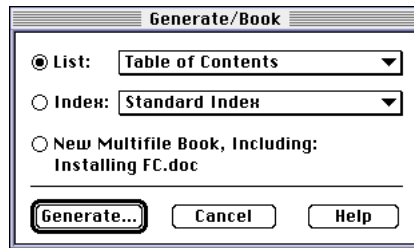
2) Select New Multifile Book Including, and click Generate.

    A new book file opens.

3) Choose File → Save As and save the book.

Adding a table of contents

To add a table of contents to the book file, follow these steps.

1) Choose File → Add File.

```
╔═══════════════════════════════════════════════════════════════╗
║  Add File to Book        ○ Generated List:   │ Table of Contents ▼│ ║
║  ┌──────────────────┐    ○ Generated Index:  │ Standard Index  ▼│   ║
║  │ Add File After: ▼│    ⦿ Document File:                          ║
║  ┌──────────────────┐                                              ║
║  │ Installing FC.doc│⇧        │ 🗀 Installing FC ▼│                 ║
║  │                  │   ┌──────────────────────┐                   ║
║  │                  │   │ 📄 Installing FC.doc  │⇧  ⊏⊐ Macintosh HD ║
║  │                  │   │                       │    ┌──────────┐   ║
║  │                  │   │                       │    │  Eject   │   ║
║  │                  │   │                       │    └──────────┘   ║
║  │                  │   │                       │    ┌──────────┐   ║
║  │                  │   │                       │    │ Desktop  │   ║
║  │                  │   │                       │    ╔══════════╗   ║
║  │                  │   │                       │    ║   Add    ║   ║
║  │                  │   │                       │⇩   ╚══════════╝   ║
║  │                  │⇩  └──────────────────────┘    ┌──────────┐   ║
║  │                  │    ☐ Add All Listed Files to Book│ Cancel │   ║
║                                                    └──────────┘    ║
║                                                    ┌──────────┐    ║
║                                                    │  Help    │    ║
║                                                    └──────────┘    ║
╚═══════════════════════════════════════════════════════════════╝
```
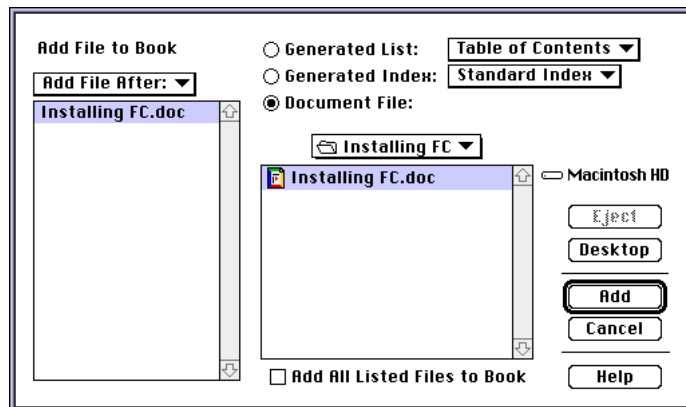
2) Select Add File Before.

3) Select Generated List, and ensure that Table of Contents is selected.

4) Click Add.

```
╔═════════════ Set Up Table of Contents ═════════════╗
║ Filename Suffix: TOC                                 ║
║                                                      ║
║ Include Paragraphs Tagged:      Don't Include:       ║
║ ┌──────────────────────┐       ┌──────────────────┐ ║
║ │                    ⬆ │       │ Appendix #     ⬆ │ ║
║ │                      │ (<---)│ Chapter #        │ ║
║ │                      │       │ Error message    │ ║
║ │                      │ (--->)│ Heading 1        │ ║
║ │                      │       │ Heading 1A       │ ║
║ │                    ⬇ │       │ Heading 1—exclude⬇ │ ║
║ └──────────────────────┘       └──────────────────┘ ║
║ ⊠ Create Hypertext Links                             ║
║                                                      ║
║ Page # in All Generated Files: Prefix:      Suffix:  ║
║                                                      ║
║ Starting Page Side:  Page Numbering:  Paragraph Numbering: ║
║ [Read from File ▼]   [Continue    ▼]  [Continue      ▼]    ║
║                                                      ║
║         ( Set )      ( Cancel )      ( Help )        ║
╚══════════════════════════════════════════════════════╝
```
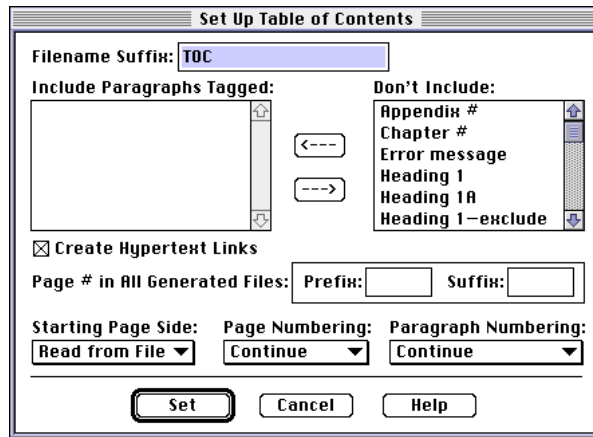
5) Ensure that the box Include Paragraphs Tagged includes the following paragraph tags:

— Heading 1

— Heading 1A

— Heading1—no chapter number

— Heading 2

— Heading 3

6) Select Create Hypertext Links, if it is not already selected.

7) Click Set.

Adding an index

To add an index to a book file, follow these steps.

1) Select Add File After and select the body text file.

2) Select Generated Index, and ensure that Standard Index is selected.

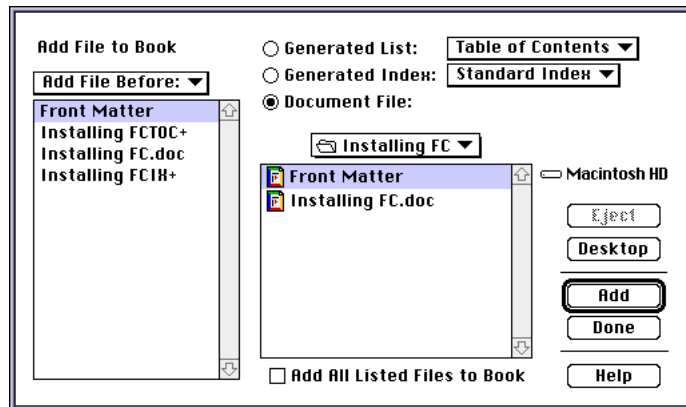3) Click Add.
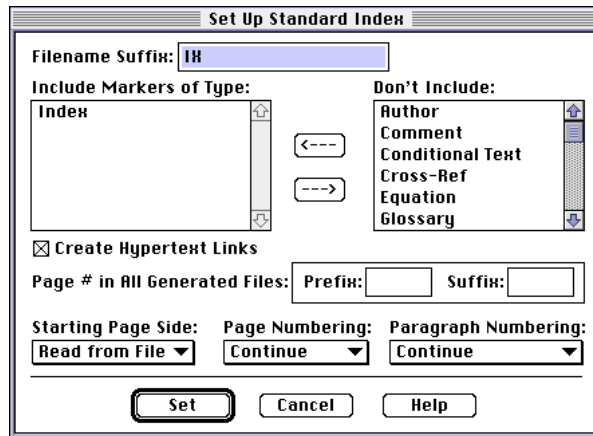
4) Select Create Hypertext Links, if it is not already selected.

5) Click Set.

Adding the Front Matter and glossary

To add the Front Matter and Glossary to a book file, follow these steps.

1) Select Add File Before and select the table of contents file.

2) Click Document File, and select Front Matter.

3) Select Glossary.

4) Click Add. ?FIX SCREEN SHOT TO INCLUDE GLOSSARY

5) Click Done.

Generating and formatting a book

When the book file contains all the necessary files, you are ready to generate, and then format, the book. This section provides procedures on the following topics:

- Generating the book

- Formatting the generated Table of Contents

- Removing extraneous lines from the Table of Contents

- Formatting the generated index

Generating the book

To generate the book, follow these steps.

1) Choose File → Generate/Update.
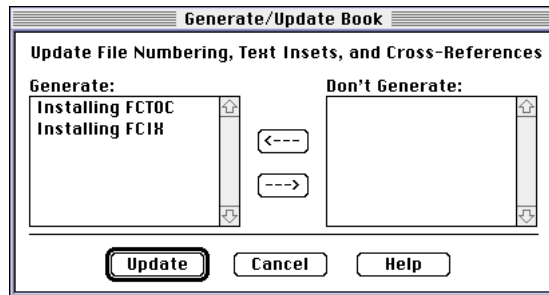
2) Ensure that both the TOC and IX files are listed in the Generate box.

3) Click Update.

   FrameMaker creates and opens the table of contents and index files.

Formatting the generated Table of Contents

To format the generated Table of Contents, follow these steps.

1) Open TOC template.

2) Click on the table of contents file to make it active.

3) Choose File → Import Formats.

4) For Import From Document, select TOC template.

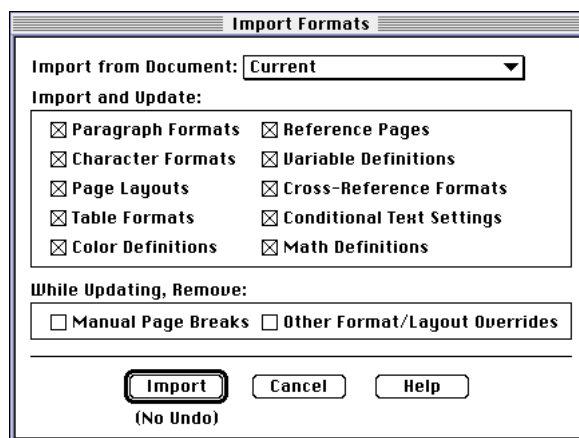5) Ensure that all Import and Update options are selected.

6) Click Import.

7) Add the title Table of contents (Heading 1 - exclude).

8) Apply First master page.

Removing extraneous lines from the Table of Contents

Every Heading 1 entry in the table of contents should have a line above it, except those at the top of a page.

In the following example the line above the heading "Formatting and language tips" is correct. The line above "Introduction" is extraneous since it's at the top of the page. On the first page, this line conflicts with the main heading, on all other pages it conflicts with the lines already at the top of these pages.
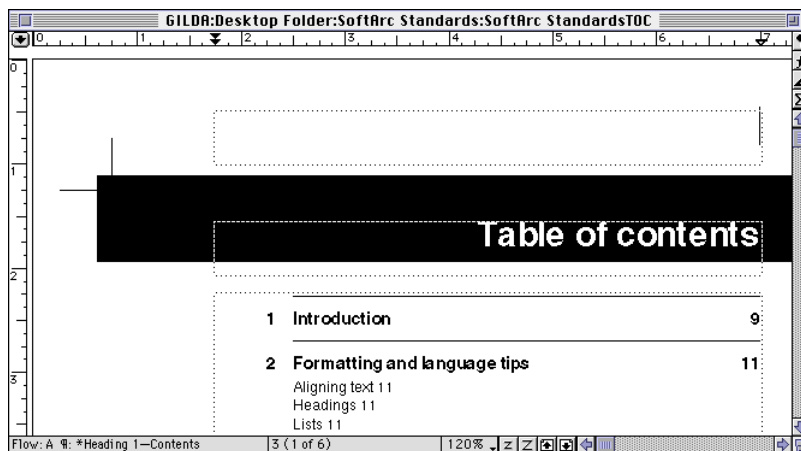
To remove these lines, follow these steps.

1) Place the cursor in the paragraph.

2) Choose Format → Paragraphs → Designer.
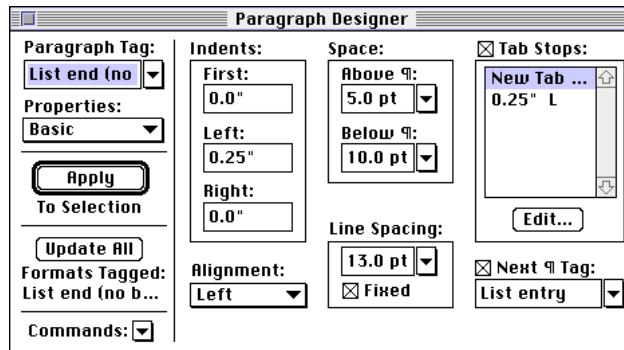
3) For Properties, select Advanced.
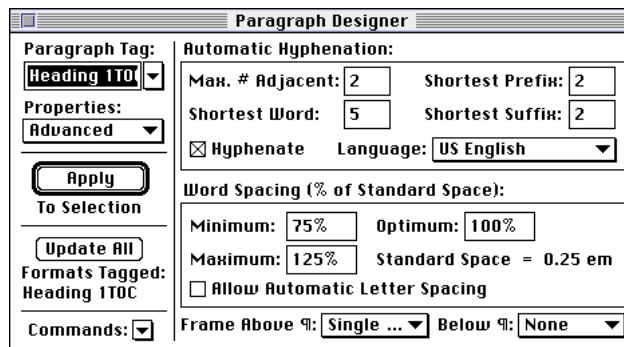
Notice that Frame Above ¶ (at the bottom of the dialog) determines the presence of the line.

4) For Frame Above ¶, select None.

5) Click Apply to Selection. (Do not click Update All, or the lines for all the Heading 1 entries will be removed.)

6) If you are prompted to create a new format, ensure that Store in Catalog is not selected, select Apply to Selection, and click Create.

7) Save the single-file FrameMaker document. You don't have to save the generated table of contents document.

8) Heading 1 entries at the top of a page don't need a line above them. For a complete procedure

Formatting the generated index

To format the generated index, follow these steps.

1) Open IX template.

2) Click on the index to make it active.

3) Repeat to , selecting the IX template instead of the TOC template.

4) Add the title Index (Heading 1 - no chapter).

5) Apply First master page.

6) For subsequent pages, choose Pages → Page Layout → Master Page Usage.

7) For Pages, type the page number of the second page of the index to the end.

8) Select Right/Left.

9) Click Apply.

10) Close the files and save the changes.

You can insert special symbols into your documents in several ways.

This chapter provides procedures for the following tasks:

- Using keyboard shortcuts

- Creating accented characters

- Using Key Caps to insert symbols (on the Mac)

- Using Character Map to insert symbols (in Windows)

- Inserting FrameMaker symbols

- Inserting symbols in Macintosh ReadMe files

- Inserting symbols in Windows ReadMe files

- Using SoftArc Dingbats

Using keyboard shortcuts

The following table lists the key combinations for a few commonly used symbols: .

non-breaking space	Option +space
non-breaking hyphen	Command + `
em dash	Shift + Option + -
•	Option + 8
®	Option + r
©	Option + g
™	Option + 2

Creating accented characters

To type accented characters, use a three-key combination. First, press the two keys that produce the accent symbol. Then, press the key for the letter to be accented. For example, to type à, you would press Option + '. Then, press A.

The following table lists the key combinations for each of the accent symbols.

`	Option + '
´	Option + e
^	Option + i
~	Option + n
¨	Option + u

Using Key Caps to insert symbols (on the Mac)

When you are using FrameMaker, our templates are set up to create "curly" quotation marks automatically. However, you may need to type straight quotation marks or apostrophes (for command line text, for example), or other symbols. To do so, choose Apple menu → Key Caps.

This utility displays all the characters and symbols available on your Macintosh. When you press Shift, Control, and Option, the symbols change accordingly. To insert a symbol into your document, press Shift, Control, or Option, along with the appropriate key on the Key Caps keyboard, copy it to the clipboard, and paste it into your document.

Using Character Map to insert symbols (in Windows)

Although you will be using the Macintosh for most of your writing at SoftArc, you will also use Windows programs from time to time (for example, when you are using Write to create Windows ReadMe files). You may

need to type straight quotation marks or apostrophes (for command line text, for example), or other symbols. To do so, double-click the Character Map icon in the Windows Accessories program group.
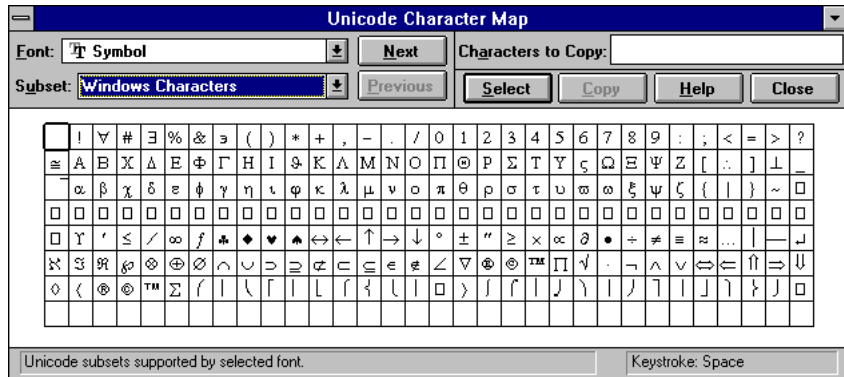
This utility displays all the characters and symbols available on your Windows computer. To view the available symbols, make selections from the Font and Symbol fields. To insert a symbol into your document, press the appropriate key on the Character Map keyboard, click Copy, and paste it into your document.

Inserting FrameMaker symbols

You can also use some of the symbols available through FrameMaker. For more information, refer to the FrameMaker *Quick Reference* booklet.

Inserting symbols in Macintosh ReadMe files

If you are using SimpleText to create a Macintosh ReadMe file, use the following keyboard combinations to create symbols:

Quotation marks   Use proper single and double quotes. To get
                                them, press the following key combinations.

"   Option + [

"   Shift + Option + [

'   Option +]

	’	Shift + Option +]
Other special characters	→	Use "->".
	®	Option + 8
	™	Option + 2
	—	Shift + Option + -

Inserting symbols in Windows ReadMe files

If you are using Write to create a Windows ReadMe file, use the following keyboard combinations to create symbols:

Quotation marks | Use proper single and double quotes. To get them, enter the following codes, using the numeric keypad.

Note: You can also copy these characters from the Character Map in the Accessories program group.

"	Alt + 0147
"	Alt + 0148
'	Alt + 0145
'	Alt + 0146

Other special characters	→	Use Alt + 0174 in the Symbol font.
	®	Alt + 0174
	™	Alt + 0153
	—	Alt + 0151

Using SoftArc Dingbats

SoftArc Dingbats is a special character set that contains many of the icons we need for our documentation. Roy creates and maintains the dingbats in Fontographer. For a complete list of all the available icons and symbols, refer to .

To include a SoftArc dingbat in your document, follow these steps.

SoftArc Standards

1) Type the character corresponding to the dingbat.

2) Select the character.

3) Apply one of the following character formats to the character:

   — SoftArc Dingbat10

   — SoftArc Dingbat24

   The format you choose will depend on how large you want the Dingbat to be. If neither of these sizes is appropriate, modify the font size with the Character Designer.

The Dingbat character set

The following table lists the icons in the SoftArc Dingbat character set.

w		V		A		OPT V	
e		m		S		OPT P	
r		–		F		OPT H	
t		W		G		?	
u		E		H		OPT ?	
p		R		L		OPT ≠	
s		T		C		+	
d		U		V		á	
f		I		B		à	
h		O		N		/	
l		P		M		â	
c		}		>		ä	
OPT t		OPT a		OPT f		"	
OPT i		OPT s		OPT h		OPT M	
OPT p		OPT d		OPT c		OPT N	

OPT v	👓🔑	OPT m	✉	OPT n	👤	
OPT I	🚻	OPT A	🗒	OPT S	✉▶	
OPT D	🗑	OPT F	⚑	OPT C	🗗	

SoftArc Standards

Using conditional text

Because our FirstClass software is available for both Macintosh and Windows platforms, we must be able to produce manuals for both platforms. Rather than keeping two separate documents with the correct information for each platform, we use the Conditional text feature of FrameMaker to create one "conditionalized" document that we can use for both.

Most of the text in our documents is common to both platforms, but some is different. For example, while Macintosh files are stored in "folders", Windows files are stored in "subdirectories". Whenever text is specific to one platform, it is marked as Macintosh or Windows only (eventually we will have UNIX as well). When we are ready to print the document, we can choose the appropriate condition, and print only the appropriate text.

This chapter provides procedures for the following tasks:

- Using conditional settings

- Avoiding condition inconsistencies in books

- Using full sentences

- Conditionalizing Mac and Windows text

Using conditional settings

Our FrameMaker templates are set up to allow for the following types of conditional text:

- common text—black

- Macintosh—green

- Windows—blue

- UNIX—dark magenta

The UNIX conditional setting is not currently used, but may be at some time in the future. Some older documents may also have conditional text for Comment or Hidden. If you come across these, you should delete them.

To check the color settings, complete the following steps.

1) Choose Special → Conditional Text.
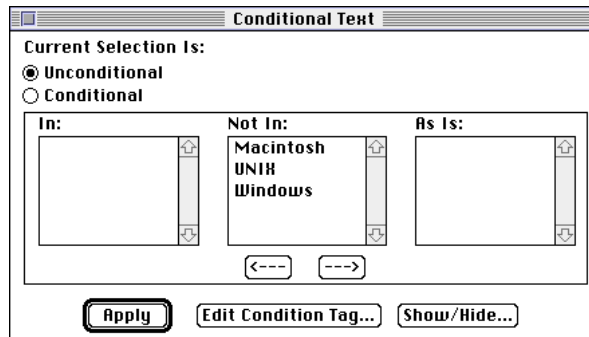
2) Click once on the setting you want to check.

3) Click Edit Condition Tag.

4) If the color is not correct, change it and click Set.

5) Close the Conditional Text dialog.

Avoiding condition inconsistencies in books

Most of our FrameMaker books consist of four files (Front Matter, TOC, body text, and Index). You must make sure that the conditional settings for each book are identical. If you don't, a message such as the following appears when you try to generate the book.
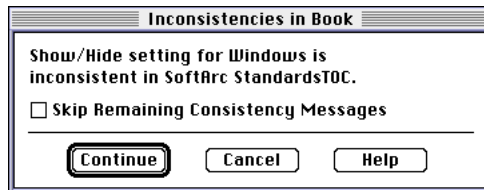
Although you can still proceed to generate the book by selecting Skip
Remaining Consistency Messages and clicking Continue, this message is a
nuisance. To avoid it, ensure that all books have the identical conditional
setting colors for each platform. Also, while you are working on the book,
and want the conditional colors to show up, the Show/Hide Settings dialog
should look like this for a Macintosh document.
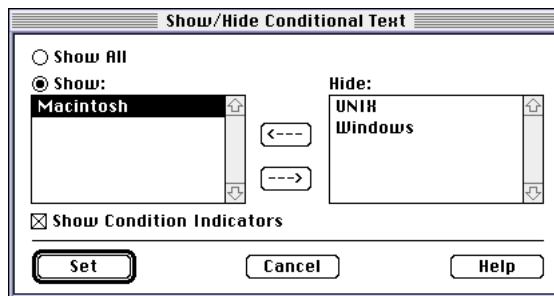
When the book is ready to be printed, don't forget to turn off the colors. The
Show/Hide Settings dialog should look like this.
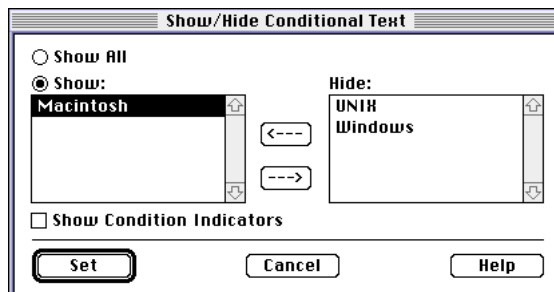
Using full sentences

When you find a sentence that needs to be conditionalized, make two complete sentences, even if there are only one or two words that are different. This makes it easier for our translators.

Conditionalizing Mac and Windows text

In addition to any conditionalized procedures and screen captures for the different platforms, we should also watch for other differences between Macintosh and Windows. For example:

- the wording of some menu commands (for example, the Stack command in the View menu in Mac, as opposed to the Cascade command in the Windows menu in Windows)

- the wording on some buttons (for example, OK or Save)

- references to AppleTalk or IPX

- folder vs. directory

- quit vs. exit from

- serial port vs. COM port

- Option key vs. Control key

- Return key vs. Enter key

- close box vs. control-menu box

- mouse button (one only on a Macintosh mouse) vs. left or right mouse button on a PC mouse

Capturing screens

In addition to writing the text for our manuals, Documentation and Design writers must also know how to add screen shots to illustrate the procedures.

In general, we usually insert a screen shot at the beginning of a procedure, to show what the form or dialog looks like when you start, and a screen shot at the end of the procedure, to show what it looks like when you're finished. Depending on the complexity of the procedure, additional screen shots might also be required.

This chapter provides information and procedures for the following topics:

Screen shot standards

When you insert screen shots into your text, keep these tips in mind.

- When a screen shot is used in a procedure, it and the step it demonstrates should be presented in a defined order—first the action to be carried out (ending in a period, not a colon or semi-colon), then the screen shot showing the result. If it's not obvious, we include an explanation of what has just happened.

SoftArc Standards

- Where possible, windows in screen shots should not be bunched together. Particularly when a series of folders are shown opened, spread them out so that readers can see the progression from one window to the next.

Creating messages that don't expire

Many of the screen shots that we use for our manuals contain sample messages from Veritec users. To save time, and ensure consistency between manuals, set your messages to never expire. To do this, follow these steps.

1) Highlight or open the message.

2) Choose File → Get Info.

3) In the Expire In field, select Never.

4) Close the form and save your changes.

Using Veritec names and positions consistently

Use the user names that have already been established for each of the Veritec servers. The following charts list the users for each Veritec server, and show the Veritec network layout.

Be consistent when describing the positions of Veritec employees. For example, don't describe Robert Ng as a graphic designer in your manual if he's been referred to as a sales manager in another manual. For the next edition of this guide, we hope to have all the titles of Veritec employees listed on our chart.

Users on the Veritec Network

**Holographics Division
(cc:Mail)**

Chris Vandenberg
Pat Wong

Instant Inc.

Robert Ng

Fax

Wilma Baker (555-1234)
Diane Duncan (905-555-7822)
David Maclean (415-7151)

**Veritec London
(FirstClass)**

Wally R. Tompkins

**VeritecBoston
(FirstClass)**

Roy W. Allen	(Cust. Support Ass't. Mgr.)
Deborah Braun	(Administrator)
Susan Chee	(Sales)
Brian L. Davies	(Marketing)
Norman Dealey	(Tech. Support Manager)
Roy Green	(Marketing)
Roy Hill	(Sales)
Tanya Koch	(Tech. Support)
Harold Lass	(Accounts Receivable)
Donna Leslie	(Sales)
Ian MacLean	(MIS)
Mary Morganstern	(Development-Mac)
Otto Ree	(Develoment -Mac)
Wendy Reed	(Tech. Support)
Pardeep Reehal	(Development-Windows)
Jean-Pierre Roy	(International Sales Liaison)
Gillian Royce	(Sales)
Joan Smith	(Tech. Support)
Dennis Topson	(Sales)
Brian Welch	(Sales)
Cathy Westlock	(Development-Windows)
Jane Witherspoon	(Sales Manager)

**Accounting
(MHS)**

Colin Bailey

**Veritec Online
(FirstClass)**

Max Switzer
Atsuko Konno
George Lee
Sabina Joshi
Doug O'Hare
Minnie Sharma
Frank Pagliaro
Isobel Ehl
Simon Archer
Fran Murphy
Daniel Anderson
Lianne Auberjeunois
Peter Cardozo
Renée Romero
Fraser Murdock

**Veritec Toronto
(FirstClass)**

Amanda Ho
Raymond Jamal
Sara Jones
Bill O'Toole
Wally R. Tompkins
Sara Vandenberg

**Veritec San Francisco
(FirstClass)**

Justin Case
Frederick E. Leitch
Howard Lufthansa
Tammy Mc Eachern
Suzanne Van Horne

**Veritec Los Angeles
(FirstClass)**

Tony Marconi
Allen Smith
Peter O. Smith

**DEV
(MS Mail)**

Thomas Brown
Chris Kurtz
Lucy Lovelace
Manoj Sahota
Howard Wong

**UNIX
(UUCP and SMTP)**

rgerber   Gareth Jones
kwoo   Bryan Klein
fkwan   Allison Smyth-Wesson
sradhak   Susan Duncan
amaggio
saulnier
ftse

The Veritec Network

Key
Gateway
S-S   server-to-server
MS   MS Mail
CC   cc:Mail

Graphics Unlimited
(cc:Mail)

CC

Instant Inc.

Veritec London
(FirstClass)

Fax

Veritec Toronto
(FirstClass)

S-S   S-S   Fax

S-S

Accounting
(MHS)

MHS

Veritec Boston
(FirstClass)

Veritec
San Francisco
(FirstClass)

S-S

S-S

Veritec Online
(FirstClass)

MS   SMTP   S-S

Media Solutions
(MS Mail)

UNIX

Veritec
Los Angeles
(FirstClass)

UUCP

The Internet

Print Division

Graphics Unlimited ⟶ Holographics Division

Veritec London   Veritec Toronto   Veritec San Francisco   Veritec Los Angeles

Branch Offices

Media Solutions Inc. ⟵ **Veritec Inc.** ⟶ Veritec Online
(joint development)   **Head Office: Veritec Boston**

Departments

Operations & Support	Sales & Marketing	Research & Development
Customer Support Roy W. Allen (Ass't. Mgr.)	**Sales** Jane Witherspoon (Mgr.) Jean-Pierre Roy (Int'l. Sales) Susan Chee Roy Hill Donna Leslie Gillian Royce Dennis Topson Brian Welch	**Windows** Pardeep Reehal Cathy Westlock
Technical Support Norman Dealey (Mgr.) Tanya Koch Wendy Reed Joan Smith		**Macintosh** Mary Morganstern Otto Ree
MIS Deborah Braun (Admin.) Ian MacLean	**Marketing** Brian L. Davies Roy Green	
Accounts Receivable Harold Lass		

Sources:
Administering FirstClass, Appendix A.
Fax Gateway, Ch. 2, Ch. 5.
Gateway for cc:Mail, Ch. 2.
Gateway for Microsoft Mail, Ch. 3.
FirstClass Client for Mac OS: User Reference Card
SMTP Gateway, Ch. 2.
Using FirstClass, Ch. 7, Ch. 8, Ch. 10, Ch. 11.

Capturing screens on the Macintosh

To capture Macintosh screens, you must have the Capture Control Panel installed on your Macintosh. You can configure the capture hot key (the default is Shift + Command + 4), as well as the format and location to which the captured screen will be stored.

If you do not have Capture Control Panel installed on your Macintosh, follow these steps.

1)   On the Apps file server, open the Mac folder.

2)   Choose Temp → Capture 4.0.2.

3)   Copy Capture 4.0.2 to your Control Panels folder.

4)   Restart your computer.

Configuring the Capture Control Panel

To configure the Capture Control Panel, follow these steps.

1)   From the Apple menu, choose Control Panels → Capture 4.0.2.
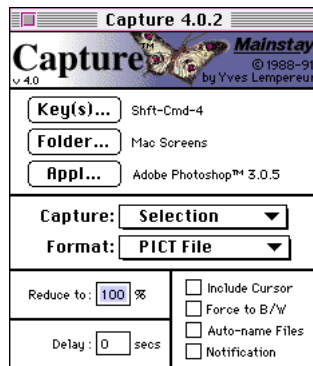
2)   You can change the following options:

Hot Key: The key combination you press to capture a screen. Click Key(s). When prompted, press the hot key combination you want to use.

Folder: The folder into which the capture files are saved. Click Folder. When prompted, select a new folder.

Appl: Adobe Photoshop.

Capture: Selection.

Format: Determines whether to save the captured image to a PICT file or to the clipboard. If you save the image to the clipboard, you can go

into Photoshop immediately after capturing it, and paste it into a new Photoshop document. This procedure assumes that you are saving images to a file.

3) Close the form and save your changes.

Capturing screens

This procedure assumes that you are using the default hot key, and that you are saving the screen to a PICT file. To capture a screen, follow these steps.

1) Make sure that the window you want to capture is the active window. Unless you want to include the cursor in the screen snap, move it away from the window.

2) Press Shift + Command + 4.

3) When the cursor turns to a cross-hair, drag a box around the screen.

4) Enter the name of the file in which you want to store the screen shot. (For information about file naming conventions, refer to Chapter 5, "Folder and file naming standards".)

5) Open the file in Adobe Photoshop.
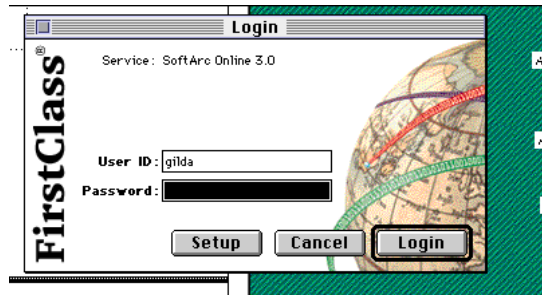
6) Choose Image → Image Size.
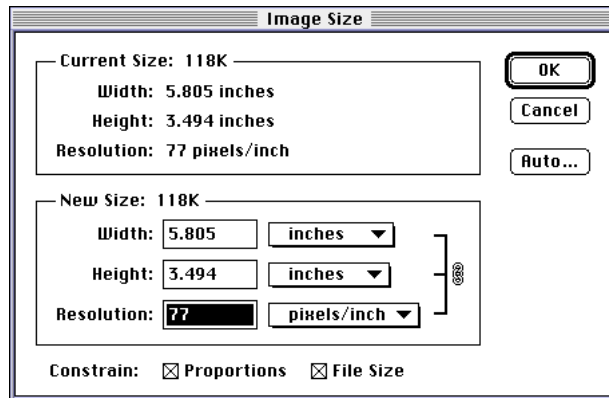
7) Select Constrain Proportions and File Size.

8) For Resolution, enter 72 pixels/inch.

9) Click OK.

10) If an additional dialog appears, for Resolution, select 16 bits/pixel.

   The image's resolution affects only how the image is printed. If the image changes on the screen—in particular, if it is enlarged or reduced—you've set the Image Size parameters incorrectly. Choose Edit → Undo, and try again.

11) Edit or crop the image as required.
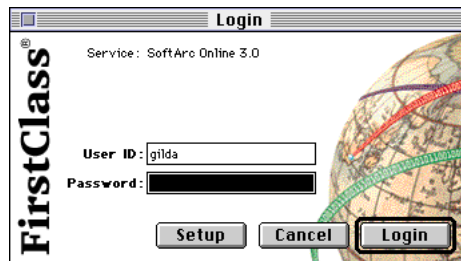
12) Choose File → Save.

The picture is saved and ready to be imported into a FrameMaker document.

Capturing screens in Windows

Capturing a screen in Windows is a simple process once you understand all the problems you might encounter. We'll deal with the problems later.

Application and document windows

In Windows, Application Window and Document Window are rather arbitrary names for the two kinds of windows you'll find in most applications. The quickest way to tell them apart is by looking at the little bar in the top-left hand corner.

Application window
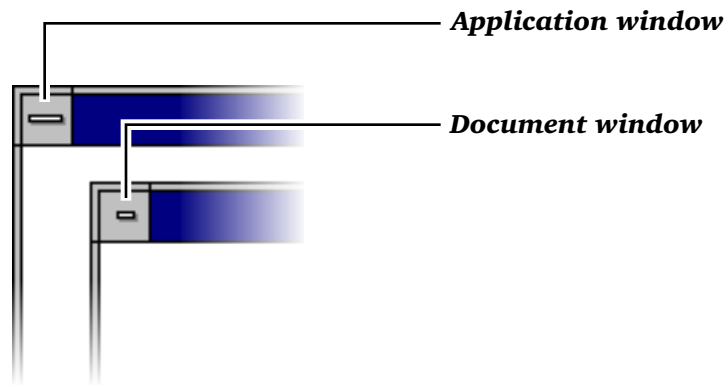
Document window

In FirstClass most of the windows you'll want to capture are document windows. Some windows, however, will be application windows—the palette, for example.

The only reason you should understand this distinction is that screen captures capture the topmost *application* window, including all the document windows it contains. If you want one of these document windows, you'll probably end up getting more screen than you need. If you have any other windows floating about, you'd better make sure that the window you want is the active window—clicking on it should do the job.

What you see is what you get

When capturing a screen, what you see is what you get. If part of the window is not visible, then it won't appear in the captured image. To solve this problem, resize or move the window, or reset the resolution of your monitor.

The exception to "what you see is what you get" are the Windows cursors—they never appear on the final captured image. For that reason we've gathered together a series of standard cursors that you can edit in later in Photoshop.

Capturing screens

1) Find the screen you wish to capture.
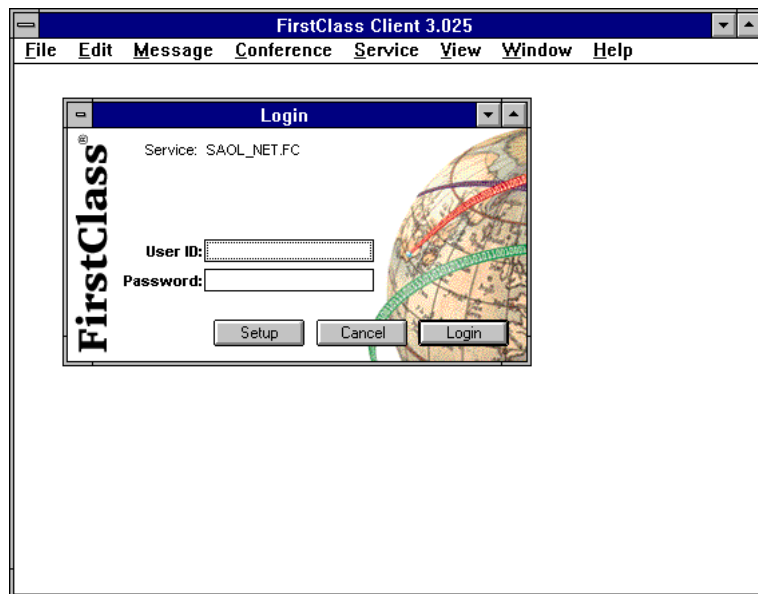
2) Press Alt + Print Screen. (The Print Screen key sits to the right of the F12 key.)

    This captures the frontmost application window and any document windows within this window.

3) Launch Paint Shop Pro.
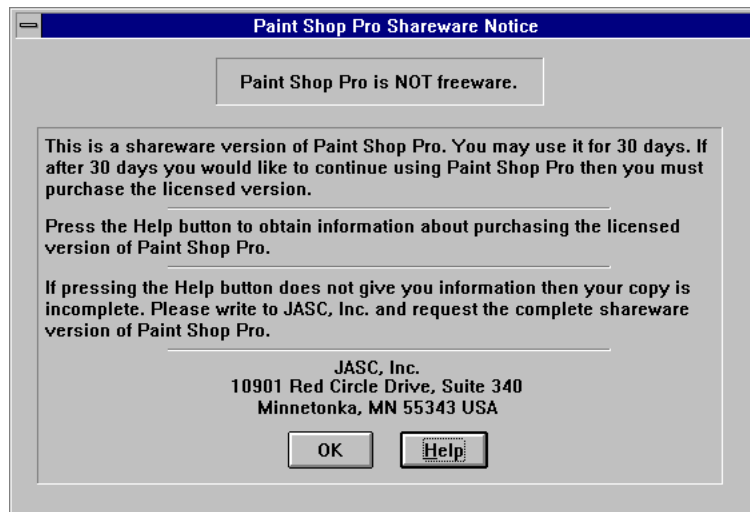
4) Click OK to dismiss the Shareware Notice.

    An empty application window appears.

5) Choose Edit → Paste.
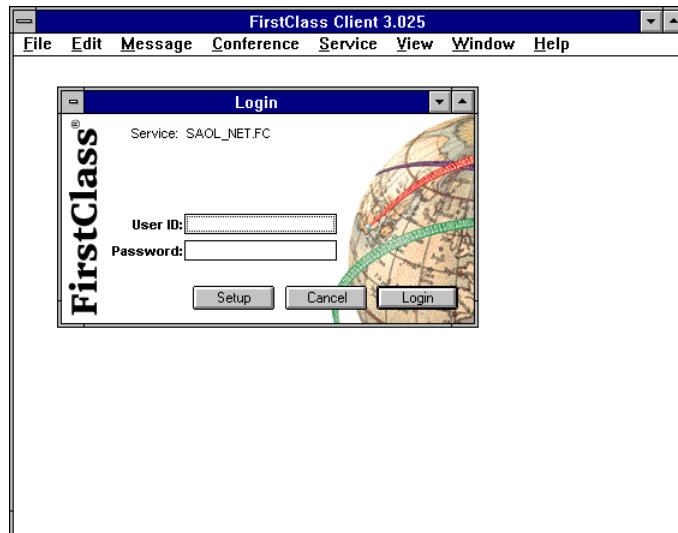
6)   Choose File → Save As.
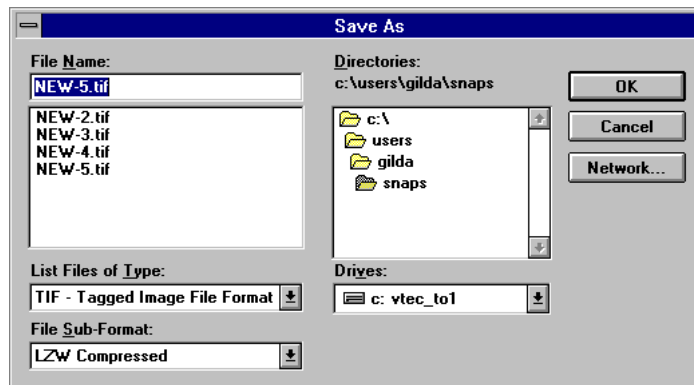
7)   For List Files of Type, select TIF.

8)   For File Sub-Format, select LZW Compressed.

9)   For the directory and drive, locate a directory accessible by your Macintosh. Here we've chosen Gilda's inbox on the server called Wanda.
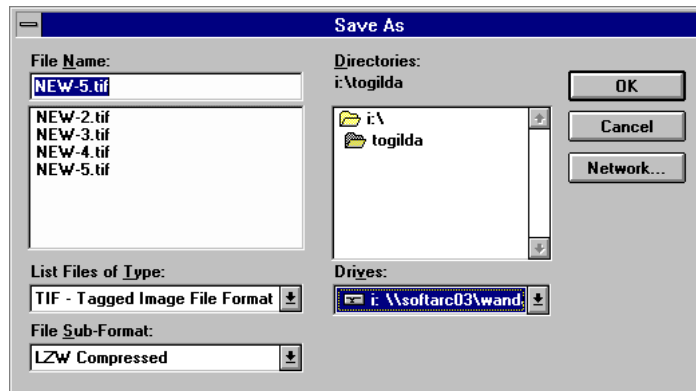
10) Click OK.

11) Moving over to your Macintosh, open the folder equivalent to the direc-
    tory you chose in step 9.

12) In Adobe Photoshop, choose File → Open, select the graphic file, and
    click Open.
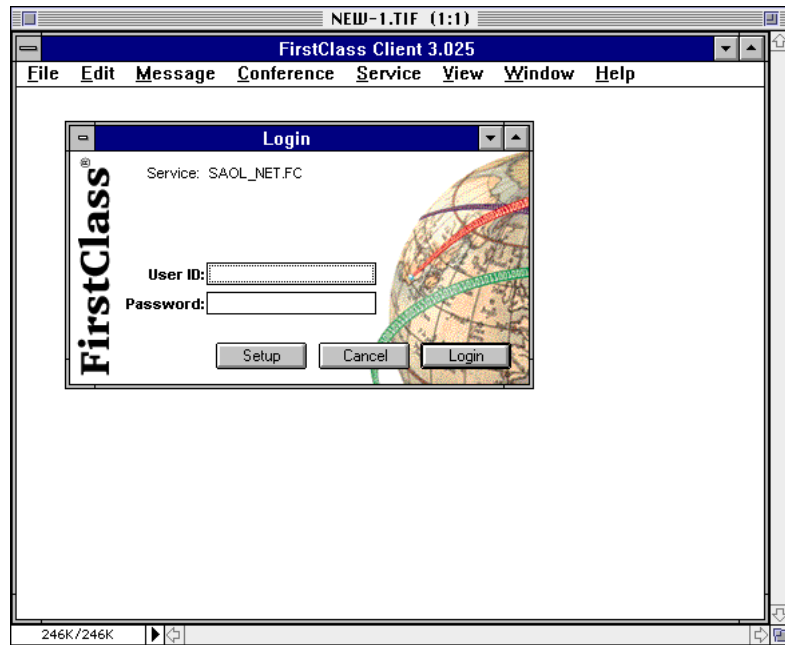
13) Choose Image → Image Size.
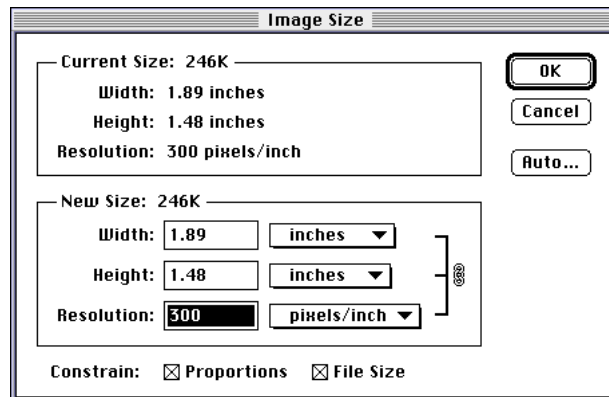
14) For Height and Width, select Pixels.

15) Select Constrain Proportions and File Size.

16) For Resolution, enter 72 pixels/inch.
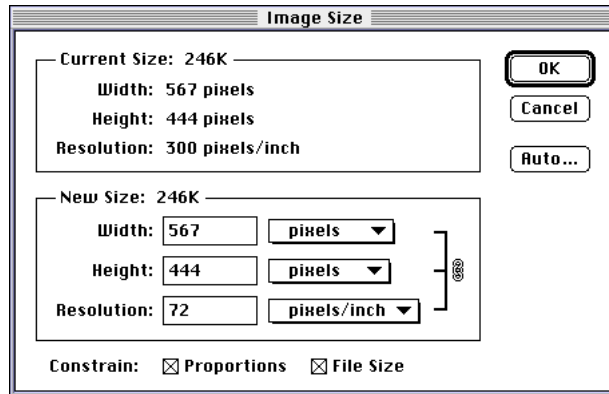
17) Click OK.

The image's resolution affects only how the image is printed. If the image changes on the screen—in particular, if it is enlarged or reduced—you've set the Image Size parameters incorrectly. Choose Edit → Undo, and try again.

18) Edit or crop the image as required.
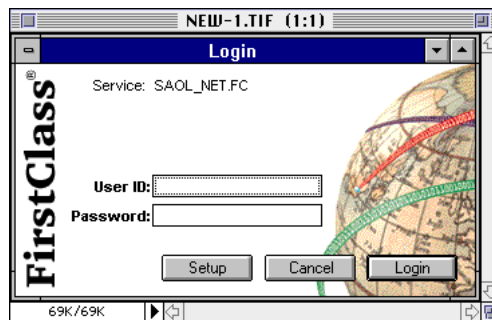
19) Choose File → Save As.
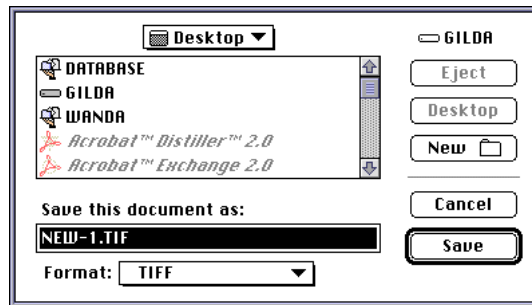
20) For Format, select PICT file.

21) If an additional dialog appears, for Resolution, select 16 bits/pixel.

22) Specify the destination for this file (the Illustrations–Windows folder in the appropriate project folder).

23) Give the picture a more descriptive name, following the guidelines in "Naming files" on page 62.

24) Click Save.
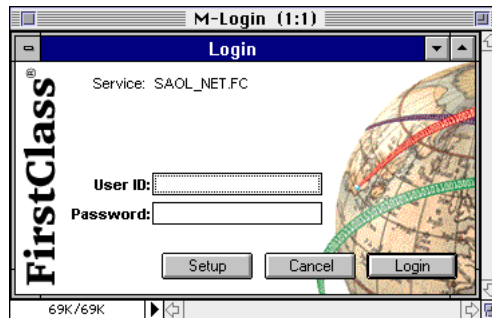
25) Click OK.

The picture is saved and ready to be imported into a FrameMaker document.

Inserting the picture into a FrameMaker document

To insert the PICT file into your FrameMaker document, follow these steps.

1) Use the Paragraph or List entry (non bullet) style.

2) Choose File → Import → File.

3) Select the appropriate filename.

4) Ensure that Import by Reference is selected.

5) Click Import.

6) Click on the graphic (not the frame) and choose Graphics → Scale.

7) Type "50" in the Factor box and click Scale.

8) Press Option + * (asterisk) to resize the frame. Use the asterisk on the number pad.

Note: If num lock is on when you press Option + *, nothing will happen.

Capturing screens in DOS

This isn't pretty.

1) Open a DOS window in Windows.

2) Follow the procedure in .

3) In Photoshop, invert the colors of the image (choose Image → Map → Invert), and make anything close to white—most importantly the background—pure white. (Select a sample, choose Select → Similar, and press Delete).

4) In FrameMaker, change the display units to points by choosing Options from the View menu, and import the picture as normal. Scale it in two steps. This is necessary because DOS screens are squashed vertically in the Windows window.

5) Scale in by entering the dimensions in points. Leave the width the same, but multiply the height by 1.6.

6) Scale the entire picture by 50%.

This lends a certain verisimilitude to the screens.

```
──────── Send Message: Editing Screen ────────
 To   :  roy@veritec
 Subj :  Missing data for budget

I'm missing the June budget report for the Customer Support
Department. Could you please send me a copy or tell me who might have
it?

Colin




                                                         I    5:6
  F1-Help  F2-Local user lists  F3-Address books  F6-Distribution lists
    F7-File attachments  F9-More options  Ctrl-Enter-Send the message
```
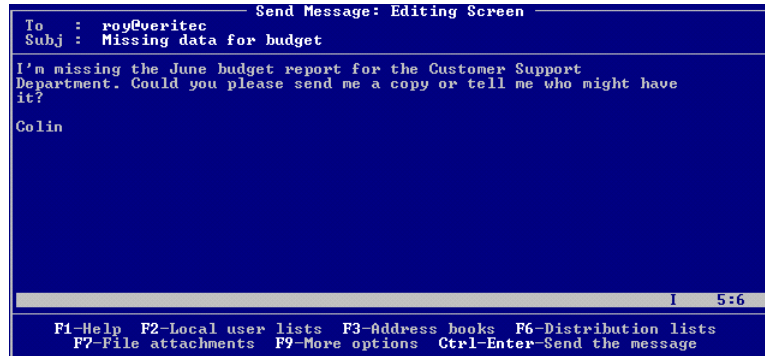
7) If the screen appears with white text on a dark background, as above, we want to reverse this to make it easier to read. Get help on this from Roy or Peter.

Adding fading to screen shots

Sometimes when a screen shot is large, you may not want to display the entire screen. In order to draw attention to a certain area of the screen, you can fade out the bottom or the top of the screen. Follow these steps.

1) Open the graphic in Photoshop.

2) Ensure that Mode is set to RGB.

3) Click a selection tool such as the Lasso tool.

4) Select some blank space on the graphic, to orient yourself when you are working in Quick Mask mode.

5) Click the Quick Mask tool.

The graphic turns pink, except for the part you selected.

6) Click the Marquee tool.

7) Draw a marquee around the part of the graphic that you want to fade.

8) Click the Gradient tool.

9) Change the background and foreground to the standard color by click-
    ing on the small icon in the bottom left corner of the colors tool.
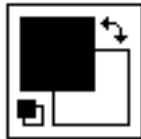
10) Pressing the Shift key, draw a straight line from the least to the most
    faded part of the faded area. Make sure that the line begins and ends
    within the marquee.

11) Click the Standard Mode tool.

12) Press Delete.

13) Close the file and save the changes.

SoftArc Standards

Fixing graphic problems in screen shots

Sometimes a screen shot needs a bit of fixing to look right. For example:

- Some screen shots contain folder icons whose colors do not appear correctly. The half -tone creates distracting patterns. Refer to <u>"Fixing half-tones in folder icons" on page 134</u>.

- Sometimes a screen that looks fine in color does not appear as clear in gray tones. You may, for example, have to increase the contrast between certain items. Get help on this from Roy or Peter.

- Sometimes a screen from another application appears with white text on a dark background. We want to reverse this to make it easier to read. Again, get help on this from Roy or Peter.

Fixing half-tones in folder icons

When you take a screen shot that includes a folder icon, Photoshop cannot recreate the color exactly, and so it creates a half-tone to approximate it. To correct a half-tone in a folder icon, follow these steps.

1) In Photoshop, open the graphic file.
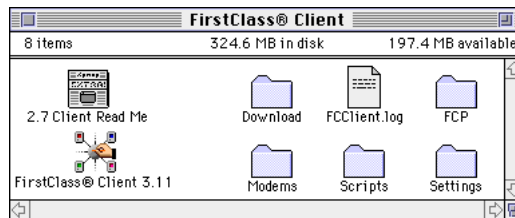
2) Using the zoom (magnifying glass) tool, enlarge the folder icon area. Notice the half-tone (also called moiré or checkerboard) pattern in the lower portion of the file icon.
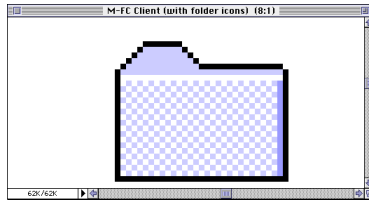
3) Click the eyedropper tool and choose Window → Palettes → Show Options.
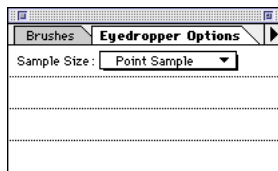
4) For Sample Size, ensure that Point Sample is selected.

5) Click in a purple area of the folder.

6) Using the marquee tool, draw a marquee around the half-tone area, excluding the white line across the top of the folder and the purple line down the side.
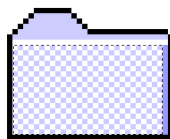
7) Choose Edit → Fill.
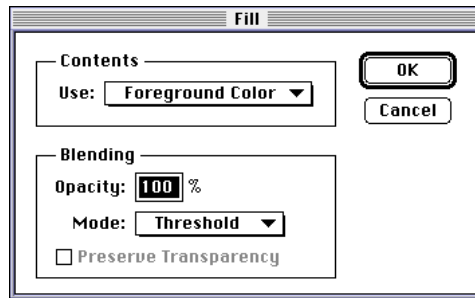
8)   Click OK.
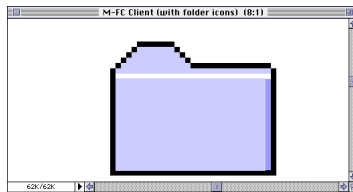
9)   Save the changes to the graphic file.

10) If there are other folders in the graphic, don't forget to fix them also by copying and pasting.
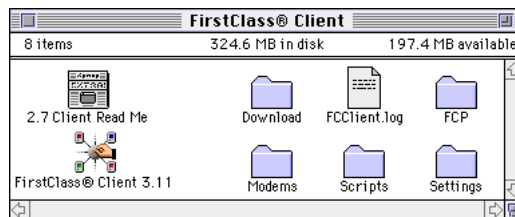
11) Save again.

Preparing for a review

Because of the similarities in all the documentation produced by SoftArc's Documentation department, we have developed a consistent approach to editing manuals and other material. The steps we've come up with are relatively simple, and will lead—we hope—to a tidier series of error-free documents.

The accuracy of your documentation can be divided into two categories—content (technical information and procedures) and formatting (spelling, grammar, language use, style, consistency, page layout, and so on).This chapter describes how to ensure that the content is accurate, and also provides many hints on how to catch and correct formatting errors. The way you do this is by asking for peer edits from other writers in the Documentation and Design department, and then regular reviews from members of other SoftArc departments.

This chapter provides procedures for the following tasks:

- Performing a general edit

- Looking for formatting errors

- Looking for other errors

- Fixing the table of contents

- Spell-checking

- Submitting your document for review

Performing a general edit

Print the document. It's much, much easier to edit and flag formatting errors on paper than on a screen.

The first pass

Read the document from beginning to end for content, sense, and style. Look for sentence fragments and incomplete thoughts, which may frequently appear as a result of out-of-context editing, and check to make sure that any pictures or snaps match the text that refers to them. Any really obvious problems should become apparent at this point.

The second pass

Go through the document *backwards*, looking for mistakes in individual sentences. Look for typos, missing words, and grammatical errors. Reading backwards isolates each sentence and keeps you from mentally filling in and fixing these kinds of problems.

Looking for formatting errors

After checking the document for errors in a general way, go back and check for the specific items listed in the rest of this section.

Character and paragraph styles

Skim through the document from the beginning, checking to make sure that all the text *looks* right. Here, you're looking for misplaced italics, tables that are misaligned or otherwise messed up, headings and titles in the wrong format, and pictures that aren't placed correctly on the page.

Other relatively common errors include the following problems:

- *Headings of the wrong type.* Only chapter titles should be Heading 1's.

- *Utterly incorrect formats.* This can often be the result of a simple misplaced click on the format list.

- *Old paragraph and character styles.* Fairly recently, we modified and simplified our paragraph and character styles, eliminating or changing the names of previously used styles. If you are revising an older document, you will have to apply the most up-to-date template and eliminate obsolete styles. For more information, refer to "Applying new formats to the body file" on page 80.

Most of these are relatively straightforward.

Page formatting

Skim the document again, this time looking at the headers, footers, and crop markings. The chapter title should be at the top left on odd-numbered pages, and the chapter number should be at the top right on even-numbered pages. The footers should have the document name on the outside.

Looking for other errors

Consistency issues

Check the document for language and formatting consistency. This is particularly important for two reasons:

- because we have recently made decisions on issues of spelling, hyphenation, capitalization, list format, and so on

- because most of our documents include contributions from more than one writer, each of whom may do things slightly differently

To check the document for all the consistency issues, refer to <u>Chapter 3, "Language standards"</u> and <u>Chapter 4, "Formatting standards"</u>.

Graphics

Check to make sure that all graphics and screen shots look the way they should; check that half-tones in folders and other icons have been re-colored to remove moiré patterns and that dark screens have been altered to improve contrast and readability.

Cross-references

Skim through the document looking for cross-references, and make sure that they send the user to the correct page. If they don't, there's been an error in the electronic version of the document. Any punctuation in a cross-reference should be *outside* the quotation marks.

In the electronic version of the document, make sure that all cross-references are formatted appropriately and that they link to the proper page and section. Use the Find command to look for unresolved cross-references and, if any exist, resolve them.

Trademarks

Skim the document looking for references to somebody else's products, and make sure that they are formatted properly and are noted on the copyright page. For the proper wording, refer to <u>Appendix C, "Trademarks"</u>.

The copyright page

Speaking of which, examine the copyright page and make sure that the date is correct, that the version, part number, edition, and product name are correct.

Addresses and phone numbers

Check SoftArc addresses and phone numbers wherever they appear in the document—in the chapters providing registration and troubleshooting information, for example. Ensure that the SoftArc address and other information is accurate—there are still some files floating around listing the Middlefield office. Copy the most up-to-date text from the boilerplate conference.

The index

The index should not have a chapter or appendix number. Check for this both in the index itself, and in the Index listing in the table of contents.

Skim the index. Make sure that all the entries are formatted correctly. Check for entries that should be combined or can be altered only slightly to make combining them possible—singular and plural entries, for example, or different verb forms.

For the most part, nouns should be plural, except where only one of a particular thing exists; there are multiple Message forms, for instance, but only one Monitor display. Verbs should be in the progressive form, ending in "ing". Check about ten entries per page of the index, and make sure they're accurate. Look for any punctuation that shouldn't be there, such as question and exclamation marks. Make sure that entries mention what kind of thing they are referring to—dialogs, fields, forms, and so on.

Fixing the table of contents

Look over the table of contents to make sure that all the headings are formatted correctly, and that all of them are in "upstyle", beginning with a capital and everything else (except proper nouns) in lower case: "Administering your FirstClass system", rather than "Administering Your FirstClass System".

Check one or two particularly complex chapters to make sure that all headings of all three types are included. Make sure that the pagination is correct, and that there is no line above the first entry. Also, look to see that where subheadings are used, there is more than one. That is, make sure that there are no Heading 1's with only one Heading 2 beneath them, and no Heading 2's with only one Heading 3. This is not always avoidable, especially under time constraints—it may require significant reorganization of the document—but widowed headings should be removed wherever possible.

Removing extraneous lines

Every Heading 1 entry in the table of contents should have a line above it, except those at the top of a page. For more information, refer to .

Spell-checking

Run the document through a spell-checker, making sure to add any appropriate words to the custom dictionary. (Before you click Add, make absolutely sure that the spelling is correct.) This will be tedious at first—especially for the first few documents that are electronically checked—but will become less of a problem as more and more manuals have their odd terminology added to the database.

However, keep in mind that the spell-checker is not infallible. If you've spelled a word incorrectly, but your error is also a word (for example, if you used *too* instead of *two*), the spell-checker won't find it. So you must check the document for spelling the old-fashioned way (by reading!) as well.

Submitting your document for review

Once you've checked your document for all the mistakes you can think of, you're ready to submit it for a peer edit. Be prepared for more mistakes—you can never find them all yourself!

Choosing peer reviewers

Choosing a reviewer for a peer edit is easy. Choose two other Documentation and Design people (usually a senior writer and a junior writer).

Choosing "real" reviewers

Your "real" reviewers should be the people who are very familiar with the technical content of the material, and who are likely to catch any errors. You may also want the input from a reviewer who is responsible for the overall vision of the project—a manager, for example.

Very early on in the project cycle, send an e-mail to the manager of each department from which you want a review, asking for suggestions as to the most suitable reviewer from that department. Keep in mind that other departments have schedules too, and it will be easier for them, and for you, if they build time for reviews into their schedule early on. Don't forget to include Marketing.

Keep track of your list of reviewers. (To make things easy, create a personal mail list on your FirstClass desktop including each of their names—that way, you can address reminders easily.) Give your reviewers a due date, and try not to proceed until you have all the comments back. Mark the reviewer's name on the front of the document itself, not just the signoff sheet (or you may not remember whose scribbles were whose), along with the date you received it.

Using signoff sheets

With each draft we circulate for a peer edit or a regular review, we include a signoff sheet. We usually submit our manuals for review at four different stages:

- outline

- first draft

- second draft

- final draft

(There is also a signoff sheet for help and ReadMe files.) However, depending on scheduling and other circumstances, we might skip one or more of these reviews. (For example, a small document might only need two drafts instead of three; or if the document must closely follow the format and content of another similar document, we might skip the outline.)

Although each signoff sheet is slightly different, each contains the following items:

- a list of things the reviewer should look for in his or her review

- the date that the document is due back from review

   All documentation scheduling is based on the assumption that the document will be returned by this date. If it is not, we might not be able to finish the document on time.

- the name of the writer to whom the document must be returned

- a place for the reviewer to sign, to indicate that he or she has reviewed the document, and approved it subject to the corrections suggested in the review comments

The wording on the signoff sheet is designed to strongly encourage reviewers to return their comments on time. If they don't, we must then decide whether we can proceed without that particular review, or whether we must hold up our schedule to allow additional time.

You can download the most up-to-date versions of the signoff sheets from SoftArc Online → SoftArc Documentation → Useful Department Things.

Finalizing the document

After your document has been reviewed and returned to you, you need to work with the review comments and finalize your document.

This chapter provides information and procedures for the following topics:

- Incorporating review comments

- Using change bars

- Getting rid of unreferenced graphic files in Frame documents

- Printing the manual

- Checking the blues

- Once you have the printed manual . . .

Incorporating review comments

Go through each comment, page by page, and make changes to your document accordingly. Set up and use change bars for important changes, as described in "Using change bars" on page 146. On each reviewer's copy, write one of the three following markings to indicate your response.

- If you agree with the comment, and you copy the wording into the document exactly, put a check mark beside the comment.

- If you agree with the comment, but need to use slightly different wording in the document, put a check mark and a squiggle beside the comment.

- If you do not agree with the comment, don't change the document, and write a short explanation beside the comment. (If you don't, your reviewer may complain afterwards, and you may not remember your reasoning at the time.) You should also probably discuss your decision with the reviewer, just to make sure that you didn't misunderstand the comment.

Be especially wary of conflicting comments from two different reviewers. If two reviewers provide conflicting information on an important issue,

arrange for a review meeting, in order to discuss the conflicting information and make a decision on which information is correct. It's not up to you to make that call.

When you're finished incorporating comments, mark the date on the front, along with the receipt date. Keep all review comments for several months after the document has been printed, just in case you need to refer to them again. This may produce a large stack of paper, but if you ever have a discussion with a disgruntled reviewer, you'll be glad you did.

Using change bars

A change bar is a vertical line in the margin that identifies new or revised text. This is useful for review purposes, because it helps you and your reviewers identify the changed text without having to reread the entire document.

You could set FrameMaker to make change bars appear automatically whenever you insert, change, or delete text. This will create a change bar at every single instance of change, no matter how minor—spelling, punctuation, and so on. You're probably better off avoiding the Automatic Change Bars feature, and marking important changes manually.

Setting up change bar format

To set up change bar format, follow these steps.

1)   Choose Format → Document → Change Bars.
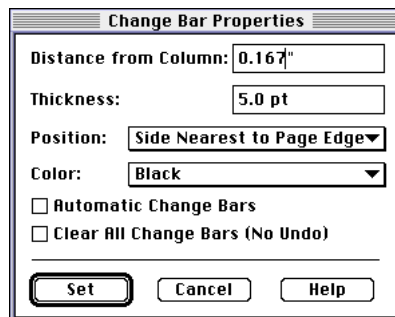
2) For Distance from Column, type .167 if your measurements are set to inches, or 12 if your measurements are set to points. You can change the measurement setting, if you wish, by choosing View → Options and then selecting a display unit.

3) For Thickness, type 5.

4) For Position, select Side Nearest to Page Edge. If you are working on a document formatted in columns, select Right of Column.

5) For Color, select Black.

6) Ensure that the Automatic Change Bars checkbox is unselected.

7) Click Set.

Marking specific text with a change bar

To mark specific text with a change bar, follow these steps.

1) Select the text you want to mark.

2) Choose Format → Characters → Designer.

3) Click Change Bar.

4) Click Apply to Selection.

Removing an individual change bar

To remove a change bar from specific text, follow these steps.

1) Select the text from which you want to remove the change bar.

2) Choose Format → Characters → Designer.

3) Click Change Bar to turn it off.

4) Click Apply to Selection.

Removing all change bars from a document

To remove all change bars from a document, follow these steps.

1) Choose Format → Change Bars.

2) Select Clear All Change Bars.

3) Click Set.

Getting rid of unreferenced graphic files in Frame documents

As you work on a manual, you create examples and the graphic files to go with them. You place those files in the appropriate Illustrations folder in the book folder. Sometimes, however, you may make changes to the manual, and some of those graphic files are no longer required. There's no need to keep them in the Illustrations folder any longer.

To get rid of graphic files that are not referenced in the document, follow these steps.

1) Choose File → Generate/Book.
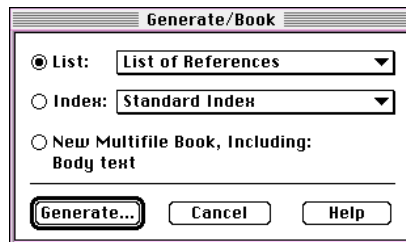
2) For List, select List of References.

3) Click Generate.
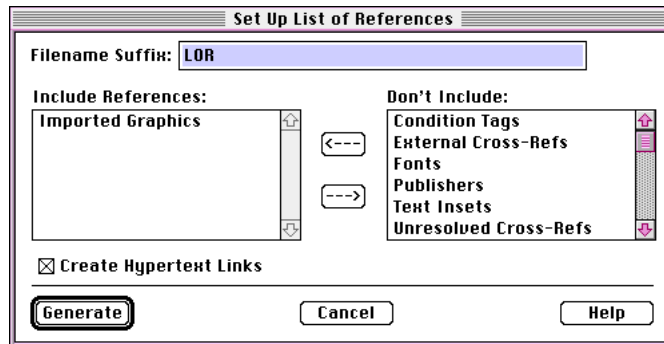
4) Move Imported Graphics from the Don't Include to the Include References box by double-clicking it.

5) Click Generate.

   FrameMaker generates a list of all the graphics in the document.

6) Open your Illustrations folder. (If you have Illustrations folders for different platforms, choose one now.)
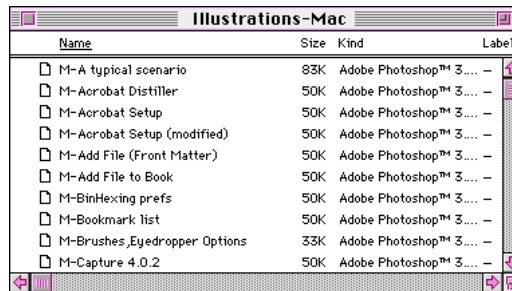
7) Check each file in this folder to see if it is in the list generated in step 5. If the file does not appear in the list, move it to the trash.

8) If you have Illustrations folders for different platforms, open each other folder and repeat step 7.

9) Before emptying the trash, open the document to make sure you haven't removed any files that you need.

10) Create the Stuffit archive, as described in . Move the archived file to the appropriate location on the Database folder.

Printing the manual

Once everything has been double- and triple-checked, you're ready to send your manual to the printer.

- Make sure that a conditionalized document is showing the correct condition, and that the condition indicators (green for Macintosh, blue for Windows, and so on) are turned off.

- If this is the first edition of the document, remove all change bars before finalizing the document. For more information, refer to .

- If this is a subsequent edition of the document, you need to keep the change bars for the Acrobat document, but remove them for the printed document. To do this, make a copy of the folder containing the FrameMaker files and illustrations. Use one folder for the Acrobat document (keeping the change bars), and use the other for the printed document (removing the change bars).

Currently, Roy makes all printing decisions, such as choosing the method and the quantities, as well as dealing with the printing house.

Checking the blues

The blues are sample pages created by the printer. Before proceeding to print the manuals, the printer sends us the blues for approval.

When the blues come in, look them over for any obvious printing mistakes, such as misalignments and miscroppings, then look at them upside-down to catch any blemishes and other errors in the actual printing process. Make sure that all chapters begin on right pages, and check to make sure that all of the pages were included. (A quick—but not foolproof—way of doing this is to look at a page at the end and make sure that it is located properly; even-numbered pages should be on the left, odd-numbered pages on the right.)

Once you have the printed manual . . .

Be prepared for a lot of your co-workers telling you about four dozen more mistakes, now that it's too late. Write them down for the next version, and file them in the Unresolved Issues folder for the particular document.

Be sure that all other related documents are completed as well (either by you or by someone else in Documentation and Design):

• the Acrobat (PDF) version of the document (refer to Chapter 13, "Creating Acrobat documents")

• online help, if applicable (Windows for sure, maybe Macintosh also)

• the ReadMe file or files (refer to Chapter 16, "Creating ReadMe files")

Creating Acrobat documents

Adobe Acrobat works well together with FrameMaker 5. From FrameMaker, you can set up the Acrobat bookmark hierarchy, and print a postscript file containing Acrobat bookmarks. FrameMaker documents are translated faithfully to Acrobat Portable Document Format (PDF), and all internal cross-references and hyperlinks embedded in the table of contents and the index are translated into Acrobat links. The result is a document that is not only true to the printed version, but also adds a series of useful tools for using the document online.

The process of translating a FrameMaker document into an Acrobat document consists of the following basic steps:

- Preparing your files

- Applying the Acrobat styles

- Applying finishing touches to FrameMaker files

- Printing the PostScript file

- Distilling the PostScript file

- Creating the cover

- Applying finishing touches to the PDF file

- Testing the PDF document

- Assigning PDF information and preferences

- Changing a PDF document whose security has been set

For information on the individual paragraph and character styles, as well as cross-reference formats and other details, refer to Appendix B, "Maintaining the glossary".

Preparing your files

Before beginning the conversion, generate both the table of contents and the index, to make sure that they are up-to-date.

Note: Make sure that you have turned off all condition indicators, and that you are only showing one condition before you generate the table of contents and the index. Don't try to print to PDF format with condition indicators showing, or the end result will be a colorful PDF file.

As always it is best if you work with a copy of the FrameMaker document and graphic files. Ideally, these should be contained in a single folder in order for FrameMaker to resolve the references to other files.

According to the FrameMaker manual, the pathname that FrameMaker stores for a file reference or imported file is usually relative. That is, it shows the location relative to the folder or directory of the document containing the reference. However, if FrameMaker has to traverse the root of the file system when building the pathname, it uses an absolute pathname.

Because FrameMaker stores relative pathnames wherever possible, it will continue to find a referenced file if you move the document and its associated files to a different folder—as long as you keep the files in the same relative locations. And if you save the document in a different folder or directory, FrameMaker adjusts the pathnames accordingly.

The following folder is typical of one of our documents. ?ADD GLOSSARY TO SCREEN SHOT
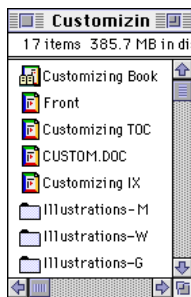
Make a copy of the folder containing the document and the associated illustrations by choosing File → Duplicate.

If you are releasing a beta PDF for testing, add "Beta—1st draft" (or 2nd draft, etc), to the Title variable and to the cover page.

Applying the Acrobat styles

Online documents allow us to employ certain effects that we cannot or would not use in a printed document. These effects include:

- colored headings at the front of each chapter

- headers and footers all justified to the right of the page

- internal cross-references colored red and underlined

Applying styles to the body text file

To apply these styles to the body of the document, follow these steps.

1) Start FrameMaker 5.

2) In FrameMaker, open the Acrobat.doc template file.

3) Open the file containing the body of your FrameMaker document.

4) Choose File → Import → Formats.

```
╔══════════════ Import Formats ══════════════╗
║                                            ║
║  Import from Document: [Current        ▼]  ║
║  Import and Update:                        ║
║                                            ║
║    ⊠ Paragraph Formats   ⊠ Reference Pages      ║
║    ⊠ Character Formats    ⊠ Variable Definitions ║
║    ⊠ Page Layouts         ⊠ Cross-Reference Formats ║
║    ⊠ Table Formats        ⊠ Conditional Text Settings ║
║    ⊠ Color Definitions    ⊠ Math Definitions   ║
║                                            ║
║  While Updating, Remove:                   ║
║                                            ║
║    ☐ Manual Page Breaks  ☐ Other Format/Layout Overrides ║
║                                            ║
║       ( Import )  ( Cancel )  ( Help )     ║
║          (No Undo)                         ║
╚════════════════════════════════════════════╝
```
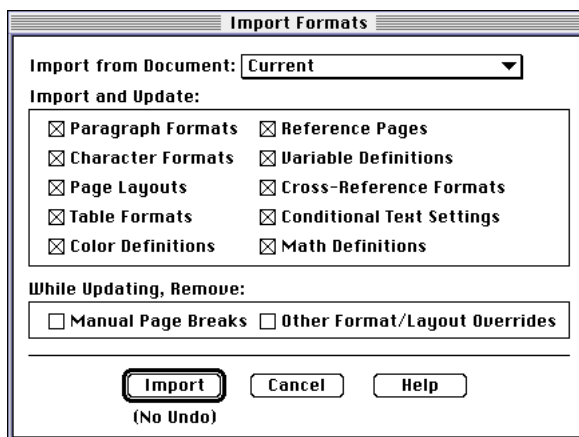
5) For Import from Document, select the document containing the Acrobat styles.

6) Select the following attributes:

— Character Formats

— Page Layouts

— Cross-Reference Formats

7) Ensure that the remaining attributes are unselected.

8) Click Import.

9) Verify that the page footers contain the correct title. (They always seem to be messing up.) If necessary, edit the variables Title, Version, and Platform, by double-clicking on them on one of the master pages.

10) In the Acrobat template, cross-references are formatted in red, underlined type, to make them stand out from the rest of the text. In documents using non-standard cross-reference formats, cross-references might be formatted incorrectly. To check them, follow these steps.

a. Choose Edit → Find/Change.
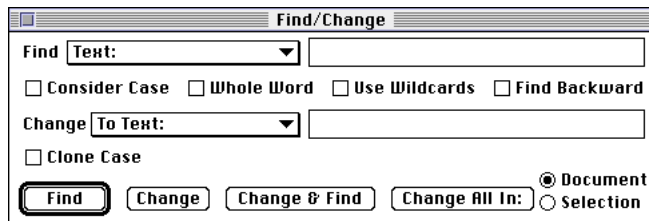
b. For Find, select Any Cross-Reference.

c. Click Find.

d. For each cross-reference you find, if it is not already formatted correctly, apply one of the standard cross-reference formats.

Note: Conditional paragraphs deactivate the color in the Cross Reference character format. You'll have to remove the conditions from these paragraphs.

11) Save the document file.

12) Close the template file.

Applying styles to the glossary

To apply the styles to the glossary, follow these steps.

1)   With the body text file still open, open the glossary for your
     FrameMaker document.

2)   Repeat step 4 on page 155 through step 11 on page 157 to import the
     Acrobat formats for the glossary. (For Import from Document, select the
     body text document.)

3)   Close and save the glossary file.

4)   Close the body text file.

Applying styles to the table of contents

To apply the styles to the table of contents, follow these steps.

1)   Open the Acrobat TOC template file.

2)   Open the table of contents for your FrameMaker document.

3)   Repeat step 4 on page 155 through step 9 on page 156 to import the
     Acrobat formats for the TOC.

4)   Close and save the TOC file.

5)   Close the template file.

Applying styles to the index

To apply the styles to the index, follow these steps.

1)   Open the Acrobat IX template file.

2)   Open the index for your FrameMaker document.

3) Repeat through to import the Acrobat formats for the index.

4) The last page of the Index should be a blank page containing only the part number. To create a correct last page, follow these steps.

     a. Go to the last page of the Index and press Return.

     b. Place the cursor in front of the paragraph mark and choose Format → Page Break.

     c. Select Top of Next Available Left Page.

     d. Choose Format → Pages → Master Page Usage.

     e. Select the master page filename Last Page and click Apply.

5) Close and save the index file.

6) Close the template file.

Applying finishing touches to FrameMaker files

There remain a few little things that you have to do by hand. For example, you must update the document's copyright information to identify the document as an Acrobat version.

Updating the copyright page

To update the copyright page, follow these steps.

1) Go to the page in Front Matter containing the document's copyright information.

2) Insert the text "Adobe Acrobat" in the document's edition number.

```
Version 1.0
First Adobe Acrobat Edition
Printed and bound in Canada
```

3) Verify that the part number on the copyright information page is correct. If necessary, edit the variable Part Number, by double-clicking on the part number on one of the master pages.

4) Close and save the document.

Checking the links

Before going any farther, verify some of the links you've created, including those in the index and TOC. To do so, press the Control and Option keys while clicking on the linked text. FrameMaker should display the page or the heading indicated.

If links in the body of the document don't work, your cross-references are set up incorrectly. Check all the cross-references in the book, and correct any that point to the wrong section.

If links in the TOC or Index don't work, follow these steps.

1) Open the book file.

2) Select the TOC or index file.

3) Choose File → Set Up File.

4) Select Create Hypertext Links.

5) Click Set.

6) When both the index and TOC are set up correctly, regenerate the book.

Checking the document

You may want to run through the document one more time, checking for errors. You may even want to print it. FrameMaker has been known to insert a blank page that gets faithfully passed onto the PostScript code and on to Acrobat, where all the references are out by one page.

Printing the PostScript file

A couple of words of warning—the creation of this PostScript file can take a very long time, depending on the size of the document. Anything over a

few pages with screen captures, and you'd be well advised to set the thing going and go off to lunch. The PostScript files created are enormous, typically 100 MB or more, again depending on the size and nature of the original. So, before going off to lunch, make sure that you are saving the file to a disk drive that has room to spare.

1) Open the FrameMaker book.

2) Choose File → Print.

```
╔═══════════════ Print Files in Book ═══════════════╗
║ Print:                      Don't Print:          ║
║ ┌──────────────────┐ ⇧      ┌──────────────────┐ ⇧ ║
║ │ Front Matter     │       │                  │   ║
║ │ SoftArc Standar… │  ┌─────┐│                  │   ║
║ │ Body text        │  │←---││                  │   ║
║ │                  │  └─────┘│                  │   ║
║ │                  │  ┌─────┐│                  │   ║
║ │                  │  │--→ ││                  │   ║
║ │                  │ ⬇ └─────┘│                  │ ⬇ ║
║ └──────────────────┘       └──────────────────┘   ║
║ ─────────────────────────────────────────────────  ║
║        ┌─────────┐  ┌──────────┐  ┌──────────┐     ║
║        │ Print…  │  │  Cancel  │  │   Help   │     ║
║        └─────────┘  └──────────┘  └──────────┘     ║
╚═══════════════════════════════════════════════════╝
```
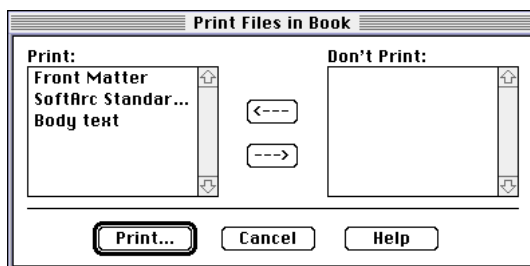
3) Ensure that all files are in the Print list.

4) Click Print.

```
┌──────────────────────────────────────────────────────────────┐
│ Printer: "ImageWriter"                        8.1.1  ┌───────┐│
│                                                      │ Print ││
│ Copies: 1      Pages: ⦿ All   ○ From:    To:         └───────┘│
│ ┌─Paper Source──────────────────┐ ┌─Destination─┐    ┌───────┐│
│ │                               │ │             │    │Cancel ││
│ │ ⦿ All ○ First from: Cassette ▼│ │ ⦿ Printer   │    └───────┘│
│ │   Remaining from: Cassette  ▼ │ │ ○ File      │   ┌────────┐│
│ │                               │ │             │   │Options ││
│ │                               │ │             │   └────────┘│
│ └───────────────────────────────┘ └─────────────┘   ┌────────┐│
│                                                     │  Help  ││
│ ⊠ Odd-Numbered Pages   ⊠ Even-Numbered Pages        └────────┘│
│ □ Registration Marks   ⊠ Collate ⊠ Skip Blank Pages          │
│ □ Last Sheet First     □ Thumbnails – Rows: 2  Cols: 2        │
│ □ Print Separations      ┌─────────────────────┐             │
│                          │  Separations Setup…  │             │
│                          └─────────────────────┘             │
│ □ Generate Acrobat Data  ┌─────────────────────┐             │
│                          │    Acrobat Setup…    │             │
│                          └─────────────────────┘             │
└──────────────────────────────────────────────────────────────┘
```

The dialog you see depends on the printer driver you're using. Select Generate Acrobat Data.
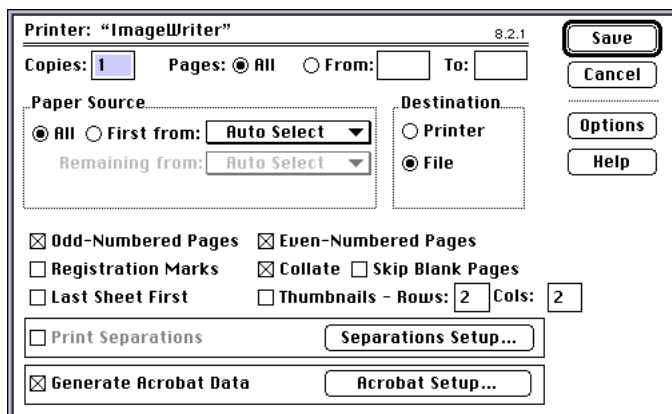
5)   Click Acrobat Setup.
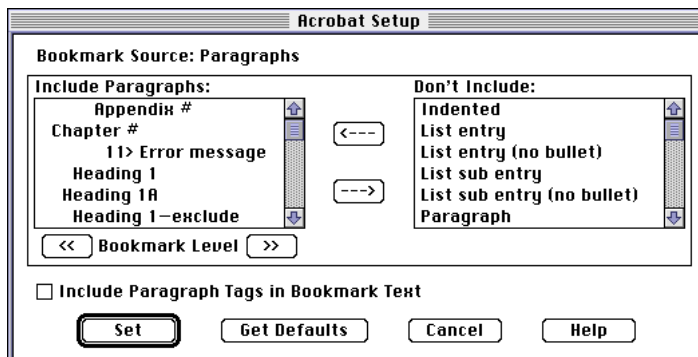
6)   Ensure that the Include Paragraphs list contains all paragraph tags you want to use as bookmarks. To move a paragraph tag from one list to the other, double-click on it.

You can include information in the bookmark list that you wouldn't normally put in a printed table of contents. If applicable, include the following:

—   a list of the index headings

— level four headings, if adding them adds to the usability of the documents

— alpha headings

— problem descriptions from the Troubleshooting section
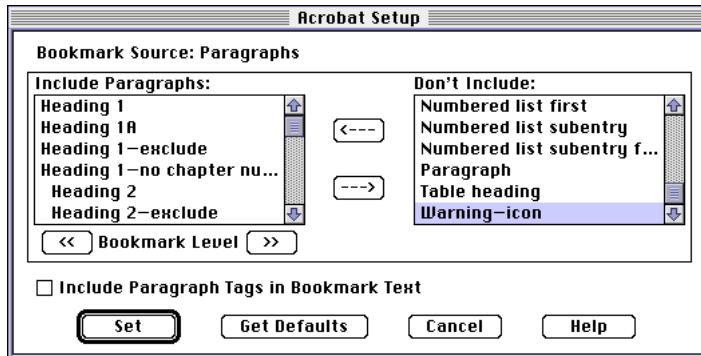
7) Configure the bookmark hierarchy. To move a tag up in the hierarchy, select it and click "<<". To move it down, select it and click ">>".

8) Click Set.

9) Click Save.
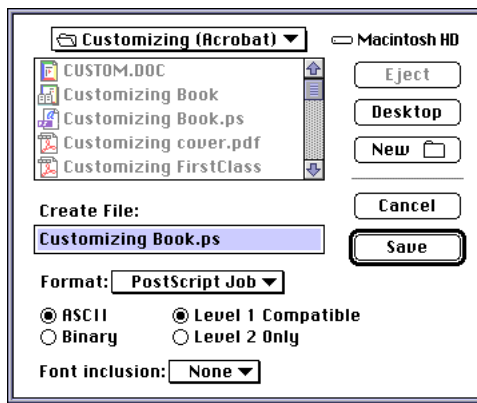
10) Select the folder in which you want to store the Postscript file, and enter a filename.

11) Select ASCII and Level 1 Compatible.

12) For Font Inclusion, select All.

13) Click Save.

Distilling the PostScript file

Adobe Acrobat Distiller converts PostScript files into Acrobat PDF documents. It ensures that the PDF document has the fonts it requires to correctly reproduce the original document, that all EPS illustrations (such as those produced by Adobe Illustrator) within the document are correctly converted, and that certain links established in FrameMaker are converted to their Acrobat equivalents.

The alternative to using Distiller is to print the FrameMaker document to PDFWriter—a chooser extension similar to a printer driver. PDFWriter, however, does not correctly translate EPS illustrations (instead using their PICT previews) and it does not translate FrameMaker links, so use it only for single pages or simple documents without links.

1) Open Adobe Acrobat Distiller.
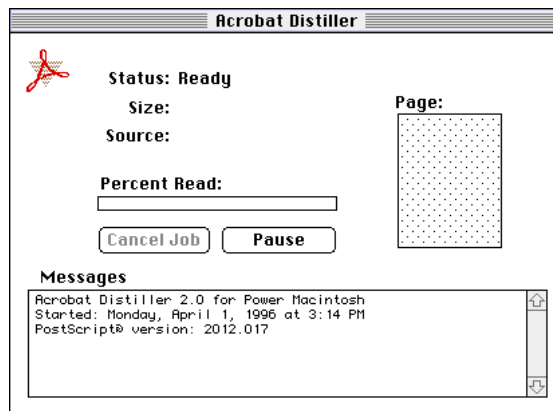
2) Choose Distiller → Job Options.
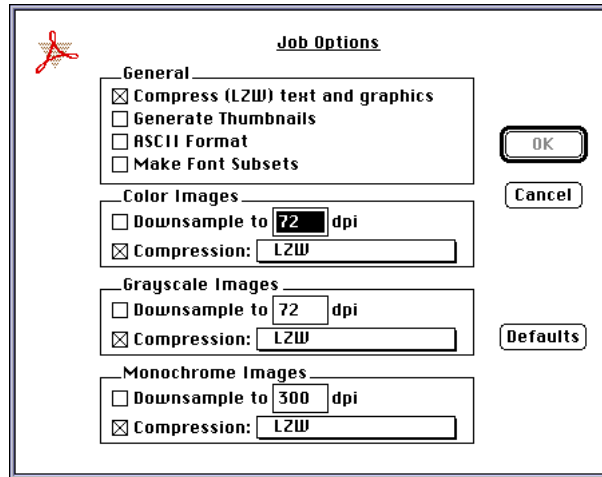
3) Select only the following options, and deselect any other options:

   — Under General, select Compress (LZW) text and graphics.

   — Under Color Images, select Compression and LZW.

   — Under Grayscale Images, select Compression and LZW.

   — Under Monochrome Images, select Compression and LZW.

   ⚠ *Warning:* Where requested to select a compression method, select LZW. The other methods available can alter the illustrations.

4) Click OK (or Cancel, if the options were already set correctly).

5) Choose Distiller → Font Locations.
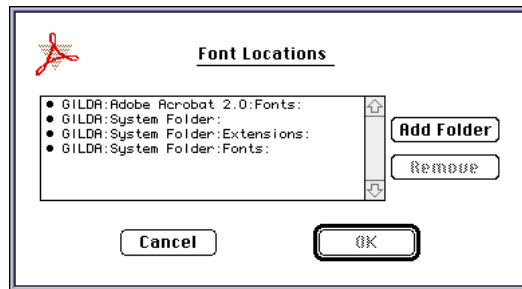
6) Verify that Distiller has correctly identified all the folders containing the fonts in your document. If not, add any missing folders.

7) Click OK (or Cancel, if the folders were already set correctly).

8) Choose Distiller →Font Embedding.
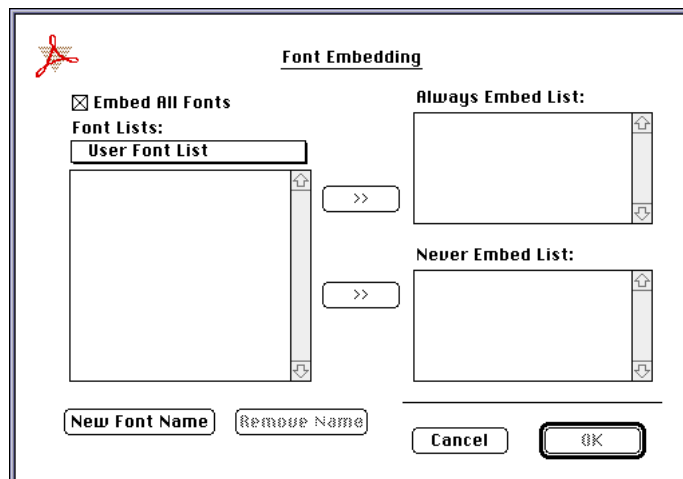
9) Select Embed All Fonts.

10) Click OK (or Cancel, if the option was already set correctly).

Note: Distiller saves the most recently used settings for <u>step 2</u> to <u>step 10</u>. Therefore, once you set them up once, you don't have to do it again (although it doesn't hurt to check, just in case).

11) Choose File → Open.

12) Select your PostScript document and click Open.
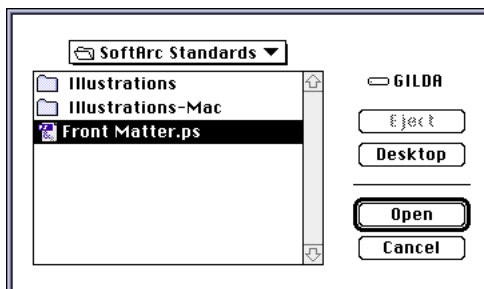
13) Click Save.

The distillation is complete when the Percent Read indicator reaches 100%. The distilled PDF document is automatically saved in the same folder as the PostScript original.

14) Quit Distiller.

Creating the cover

Currently, SoftArc's documents come with one of two possible covers: custom printed for the document or generic. We want the PDF version of the document to mimic this cover.

The covers are generated as PDF documents from an Adobe Illustrator file and then added to the PDF version of the document. To create the cover, follow these steps.

1) Locate the Adobe Illustrator file for the cover you want to create. The best way to find such a file is to search among the files created for an existing document that has such a cover.

2) Open the Illustrator file and edit the cover's title.

3) Print the cover to a PostScript file. Follow the same procedure you used when creating the PostScript file of the FrameMaker document. Refer to . Creating the cover takes a fraction of the time it takes to create a large document.

4) Open the PDF version of the cover using Acrobat Exchange.

5) Choose Edit → Pages → Crop.

```
┌──────────────────── Crop Pages ────────────────────┐
│ ┌─ Margins (In Inches) ──────────────────────────┐ │
│ │              ⇕                                   │ │
│ │         ┌─────────────┐      Left:  [0.47]      │ │
│ │    ⇔⇔   │        ⇔⇔   │      Top:   [1.14]      │ │
│ │         │             │      Right: [1.03]      │ │
│ │         └─────────────┘      Bottom:[1.36]      │ │
│ │              ⇕                                   │ │
│ └─────────────────────────────────────────────────┘ │
│ ┌─ Pages ─────────────────────────────────────────┐ │
│ │ ○ All   ● From: [1]   To: [1]   of 1            │ │
│ └─────────────────────────────────────────────────┘ │
│                           [ Cancel ]   [  OK  ]      │
└─────────────────────────────────────────────────────┘
```
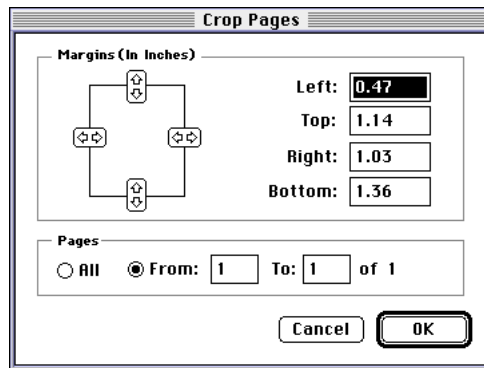
6) Adjust the margins until the guides match (more or less) with the crop marks and the cropped dimension matches (exactly) the dimensions of the actual document—7.0" wide, 8.5" tall. You'll have to do a bit of math here, subtracting the margins from the 8.5" by 11" page—the top and bottom margins together should total 2.5", the left and right should total 1.5".

7) Click OK twice.

8) Save the cover document.

Applying finishing touches to the PDF file

Adobe Acrobat Exchange allows you to add a few more bells and whistles to your PDF document—bells and whistles that cannot be created in the

original FrameMaker file. It also serves to bring everything together into one tidy package.

1) Open your PDF document using Acrobat Exchange.
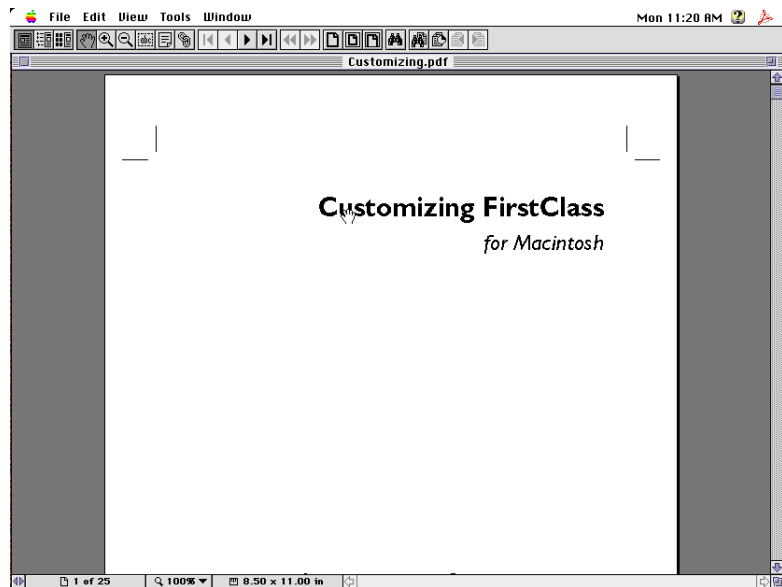
2) Verify that the internal Acrobat page numbers correspond with those that appear on the page. To best do this, go to the end of the document.

   As already stated, occasionally FrameMaker inserts a spurious blank page into the PostScript code.

Touching up the bookmark list

FrameMaker automatically generates the bookmark list when it prints the book to a PostScript file. Using Acrobat Exchange, however, you should touch up the bookmark list as follows.

1) Choose View → Bookmarks and Page.

2) There is a limit to the number of characters a bookmark's label can have. If labels have been truncated, edit them to make them fit.

3) Move alpha headings, if necessary.

4) Move the Index bookmark, currently the last in the list, up so that it appears immediately after the Table of Contents bookmark.

The following is a typical bookmark list.
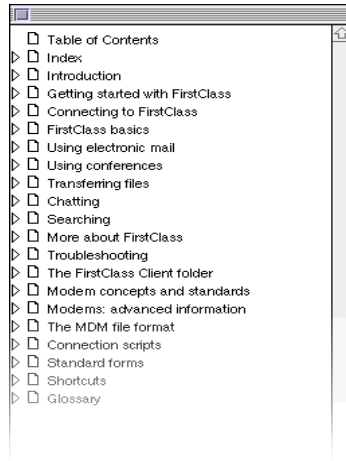
5) When you are finished touching up the bookmark list, save and close the document.

Cropping the manual's pages

To crop the manual's pages, follow these steps.

1) Open the PDF manual.

2) Choose Edit → Pages → Crop.

The FrameMaker pages have been centered in the page, so you do not have to crop by eye.

3) For Left and Right, enter 0.75.

4) For Top and Bottom, enter 1.25.

5) For Pages, select All.

```
┌──────────────────────── Crop Pages ────────────────────────┐
│ ┌─ Margins (In Inches) ─────────────────────────────────┐  │
│ │              ┌─┐                                        │  │
│ │              │⇧│                  Left:  ┌──────┐       │  │
│ │              │⇩│                         │ 0.47 │       │  │
│ │              └─┘                  Top:   ┌──────┐       │  │
│ │   ┌──┐            ┌──┐                   │ 1.14 │       │  │
│ │   │⇦⇨│            │⇦⇨│          Right:  ┌──────┐       │  │
│ │   └──┘            └──┘                   │ 1.03 │       │  │
│ │              ┌─┐                 Bottom: ┌──────┐       │  │
│ │              │⇧│                         │ 1.36 │       │  │
│ │              │⇩│                                        │  │
│ │              └─┘                                        │  │
│ └────────────────────────────────────────────────────────┘ │
│ ┌─ Pages ─────────────────────────────────────────────────┐ │
│ │  ○ All   ● From: ┌─┐ To: ┌─┐   of 1                      │ │
│ │                  │1│     │1│                             │ │
│ │                  └─┘     └─┘                             │ │
│ └─────────────────────────────────────────────────────────┘ │
│                              ┌──────────┐  ┌──────────┐     │
│                              │  Cancel  │  │    OK    │     │
│                              └──────────┘  └──────────┘     │
└─────────────────────────────────────────────────────────────┘
```

6) Click OK twice.

Adding the cover

To add the cover, follow these steps.

1) Go to page 1 of the PDF document.

2) Choose Edit → Pages → Replace.

```
┌─────────────────────────────────────────────────────────┐
│ Select File With New Pages:                             │
│   ┌ Using FC 3.1 Acrobat ▼┐                             │
│   ┌──────────────────────────┐                          │
│   │ 📄 Cover for Using.pdf   ⇧│    ▭ GILDA              │
│   │ 📄 Using FirstClass for Mac.pdf│                    │
│   │                           │    ┌──────────┐         │
│   │                           │    │  Eject   │         │
│   │                           │    └──────────┘         │
│   │                           │    ┌──────────┐         │
│   │                           │    │ Desktop  │         │
│   │                           │    └──────────┘         │
│   │                           │    ──────────────        │
│   │                           │    ┌──────────┐         │
│   │                          ⇩│    │  Select  │         │
│   └──────────────────────────┘    └──────────┘         │
│   ☐ Show All File Types            ┌──────────┐         │
│                                    │  Cancel  │         │
│                                    └──────────┘         │
└─────────────────────────────────────────────────────────┘
```
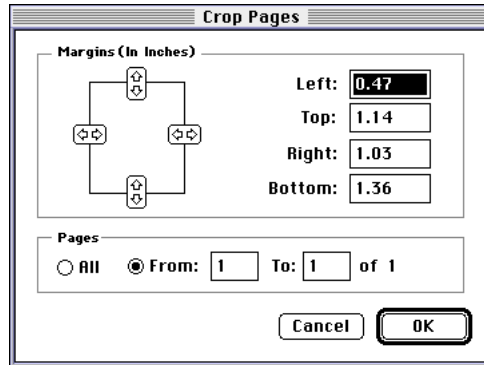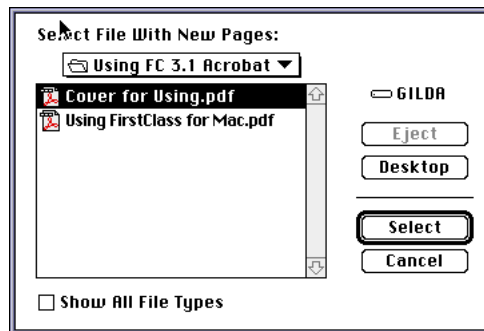
3) Select the cover you created and click Select.

```
┌─────────────────────────────────────────────────┐
│ ═══════════════ Replace Pages ═══════════════   │
│  ┌─ Original ──────────────────────────────────┐ │
│  │                                             │ │
│  │  Replace Pages: [  1  ]  To: [1    ]  of 230│ │
│  │                                             │ │
│  │  in "Using FirstClass for Mac.pdf"          │ │
│  └─────────────────────────────────────────────┘ │
│  ┌─ Replacement ───────────────────────────────┐ │
│  │                                             │ │
│  │  With Pages:  [1    ]  To: 1      of 1      │ │
│  │                                             │ │
│  │  from "Cover for Using.pdf"                 │ │
│  └─────────────────────────────────────────────┘ │
│                         ( Cancel )  (( OK ))     │
└─────────────────────────────────────────────────┘
```
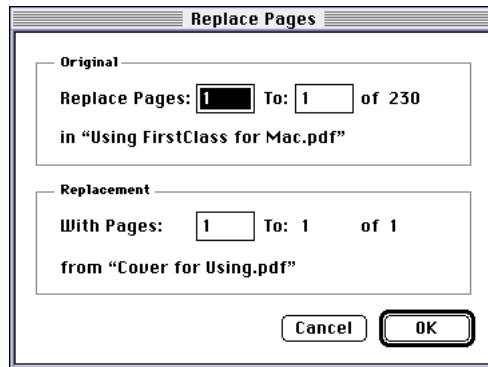
4)   Verify that you are replacing page 1 with the correct page.

5)   Click OK.

Testing the PDF document

To ensure that the PDF document is perfect, you should double-check a few last items.

Fixing bookmarks

Make sure that your bookmarks open properly. They should open one level at a time when the reader clicks on an arrow.

Fixing links

Although Acrobat Exchange works fairly well to keep the links originally created in FrameMaker, sometimes a link may be missed, especially in the index. There may also be overlapping links or extraneous links. You should test the Acrobat document and correct these now.

1)   Open the PDF document using Acrobat Exchange.

2)   Choose Tools → Link.

The cursor changes to the Link tool: +

3) Starting at the first page, inspect the links to ensure that they are correct. The links appear as rectangles around the cross-referenced text.

4) To delete an extraneous link, click on the empty rectangle, press Delete, and click OK to confirm.

5) To correct an overlapping link, click on the rectangle, and drag it to the correct position.

6) To add a missing link, follow these steps.

    a. Draw a rectangle around the text. If you are adding this link near an existing link, make sure that the cursor appears as cross hairs, not as an arrow (if it's an arrow, you're changing the existing link, rather than adding a new one).

    b. Choose View→ Go to Page.
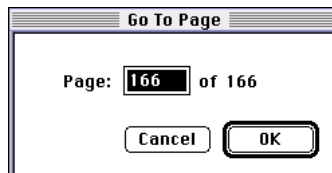
    c.   Type the page number and click OK.

    d.   Click Set Link.

    Don't worry about missing links for the end of a page range—just make sure that there is a link for the first page in the range.
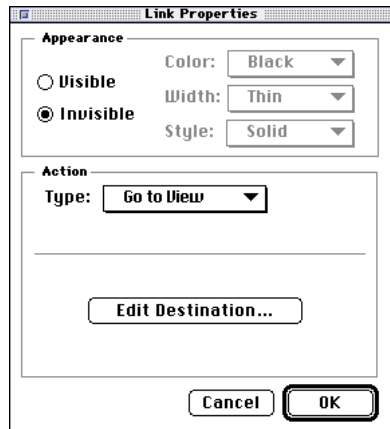
7) When you are finished with all changes, save the PDF document.

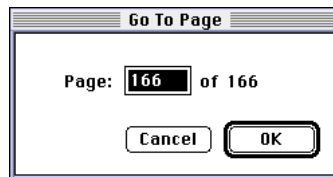## Fixing *See* and *See also* index entries

In FrameMaker, you can create a *See* or *See also* index entry to instruct users to refer to another index entry, rather than a page in the text. For more information about index entries, refer to .

However, when Acrobat Exchange creates the link for a *See* or *See also* index entry, the link destination is the page on which the entry was originally created. You must change this link destination manually to point to the alternate index wording.
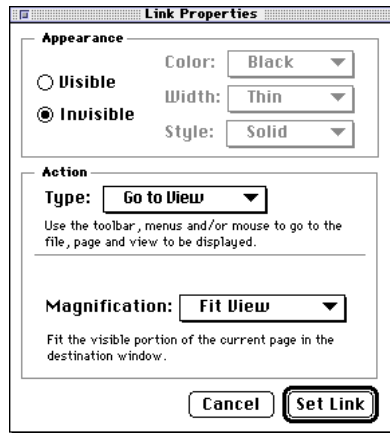
1) Open the PDF document using Acrobat Exchange.

2) Choose Tools → Link.

3) Move to the first page of the index.

4) Choose Tools → Find.

5) Type "See" and click Find.

6) Double-click on the link.

7) Click Edit Destination.

8) Choose View → Go to Page.

9) Type the page number of the alternate index entry and click OK.

10) Click Set Link.

11) Repeat with all *See* or *See also* index entries.

12) When you are finished with all changes, save the PDF document.
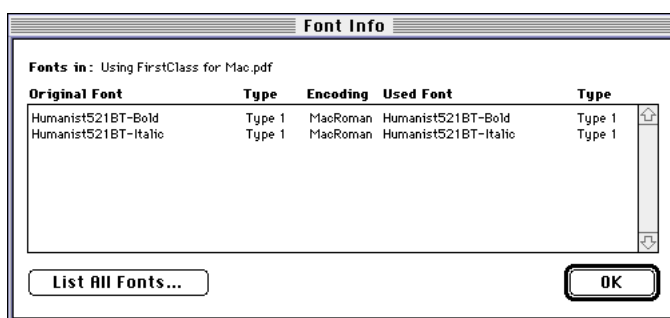
Testing fonts

Since the document must perform well on anyone's system, regardless what fonts they may have installed, you should test the PDF document to make sure it appears correctly and prints correctly under the most basic conditions. To do this you have to deinstall all but the fonts needed for Acrobat to function.

1) Quit any applications that may be running on your computer.

2) Open the System Folder.

3) Create a folder called "Fonts test".

4) *Copy* the following font files into the new Fonts folder. If you copy these files instead of just moving them, you can rename the new Fonts folder when you're through with it, and use it again the next time.

    — Adobe Sans MM

— AdobeSanMM

— Adobe Serif MM

— AdobeSerMM

— Symbol

— Symbo

5) Drag the original Fonts folder to your desktop.

6) Change the name of "Fonts test" to "Fonts".

7) Restart your computer. This step is necessary, since otherwise some or all of the fonts may still be in the computer's memory, and Acrobat will not need to generate them using its embedded fonts.

8) Open the PDF document using Adobe Acrobat Reader. Don't just double-click on it—this will probably open Acrobat Exchange.

9) Move through the document, inspecting cases where special fonts are used.

10) Choose File → Document Info → Fonts.

```
╔══════════════════ Font Info ══════════════════╗

    Fonts in: Using FirstClass for Mac.pdf

    Original Font          Type   Encoding  Used Font          Type
   ┌──────────────────────────────────────────────────────┐ ⬆
   │ Humanist521BT-Bold    Type 1  MacRoman Humanist521BT-Bold  Type 1 │
   │ Humanist521BT-Italic  Type 1  MacRoman Humanist521BT-Italic Type 1 │
   │                                                        │
   │                                                        │
   │                                                        │
   │                                                        │
   │                                                        │ ⬇
   └──────────────────────────────────────────────────────┘

   ( List All Fonts... )                           ( OK )
╚════════════════════════════════════════════════╝
```

Font Info shows which fonts are embedded in the document and which are being generated by Adobe Type Manager from its generic fonts— Adobe Serif MM and Adobe Sans MM. If a font used by the document

is installed on the computer, Acrobat Reader uses that version of the font rather than the embedded version.

11) Print the document and verify that it is identical to the original.

12) When you are finished testing, complete the following steps to return your fonts to normal.

— Quit all applications.

— Open the System Folder and rename the new Fonts folder you created to FontsTest.

— Move the original Fonts folder back to the System Folder.
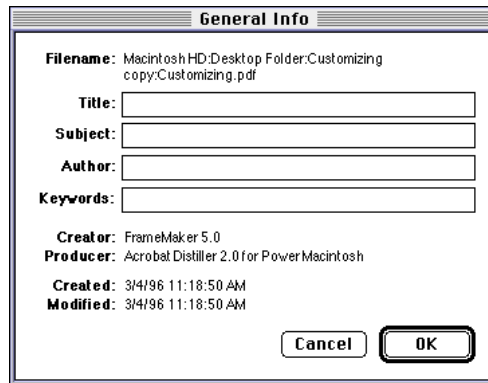
— Restart your computer.

Assigning PDF information and preferences

Once you know that the PDF document is working perfectly, you need to complete just a few more tasks to finish it off.

Setting general document options

To set the general document options, follow these steps.

1) Open the document using Acrobat Exchange.
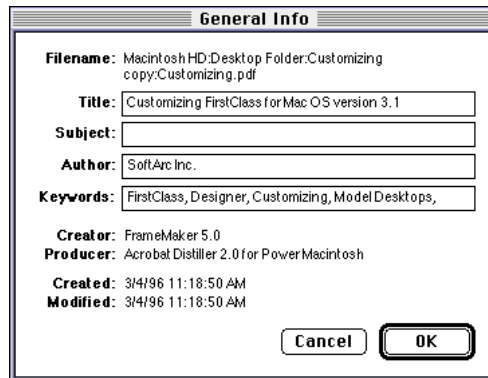
2) Choose File → Document Info → General.

```
┌─────────────────────────────────────────────┐
│ ═══════════════  General Info  ═══════════════ │
│                                               │
│  Filename:  Macintosh HD:Desktop Folder:Customizing │
│             copy:Customizing.pdf              │
│    Title: [                                 ] │
│  Subject: [                                 ] │
│   Author: [                                 ] │
│ Keywords: [                                 ] │
│                                               │
│   Creator:  FrameMaker 5.0                    │
│  Producer:  Acrobat Distiller 2.0 for Power Macintosh │
│                                               │
│   Created:  3/4/96 11:18:50 AM                │
│  Modified:  3/4/96 11:18:50 AM                │
│                        [ Cancel ]  [  OK  ]   │
└─────────────────────────────────────────────┘
```

3) For Title, enter the title that appears in the document's footer.

4) Leave Subject blank.

5) For Author, enter "SoftArc Inc.".

6) For keywords, enter as many keywords as you see fit, separated by commas. Include the platform the product runs on.

```
┌─────────────────────────────────────────────┐
│ ═══════════════  General Info  ═══════════════ │
│                                               │
│  Filename:  Macintosh HD:Desktop Folder:Customizing │
│             copy:Customizing.pdf              │
│    Title: [ Customizing FirstClass for Mac OS version 3.1 ] │
│  Subject: [                                 ] │
│   Author: [ SoftArc Inc.                    ] │
│ Keywords: [ FirstClass, Designer, Customizing, Model Desktops, ] │
│                                               │
│   Creator:  FrameMaker 5.0                    │
│  Producer:  Acrobat Distiller 2.0 for Power Macintosh │
│                                               │
│   Created:  3/4/96 11:18:50 AM                │
│  Modified:  3/4/96 11:18:50 AM                │
│                        [ Cancel ]  [  OK  ]   │
└─────────────────────────────────────────────┘
```
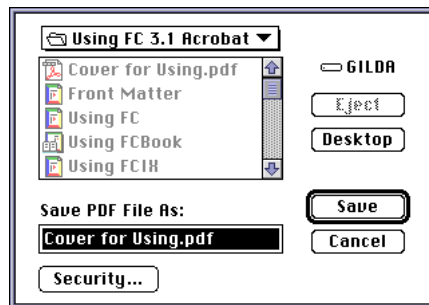
7) Click OK.

8) Choose File → Document Info → Open.
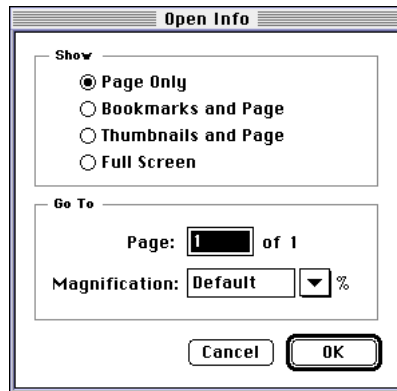
9) For Show, select Bookmarks and Page.

10) For Go To, enter Page 1.

11) For Magnification, select Default.

12) Click OK.

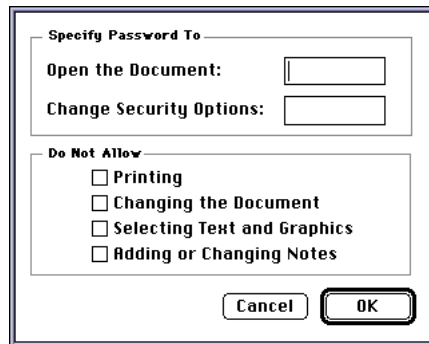## Setting the security options
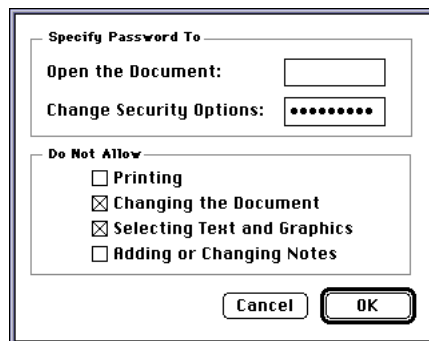
To set the security options, follow these steps.

1) Choose File → Save As.

2) Click Security.

3) Leave Open the Document blank.

4) For Change Security Options, type the password "softdoc". (This field is case-sensitive, so type lower case letters.)

5) In the Do Not Allow section:

   — Select Changing the Document.

   — Select Selecting Text and Graphics if this is anything *other than* FirstClass Client documentation. If this is FirstClass Client documentation, leave this option unselected.

   — Leave the other options unselected.

6) Click OK.

7) Confirm the password and click OK.

```
┌──────────────────────────────────────┐
│  Confirm Password to                 │
│  Change Security Options: │       │   │
│                                      │
│              ( Cancel )  ( OK )      │
└──────────────────────────────────────┘
```
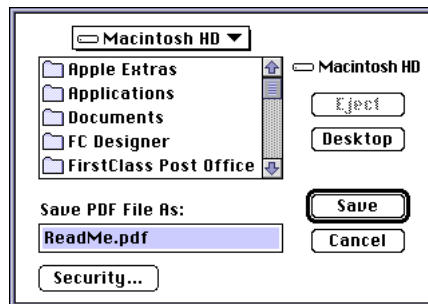
8) Enter the name you want the PDF document to have (include ".PDF") and click Save.

Changing a PDF document whose security has been set

If, after setting the security option described in "Setting the security options" on page 179, you discover that you must change the document, follow these steps.
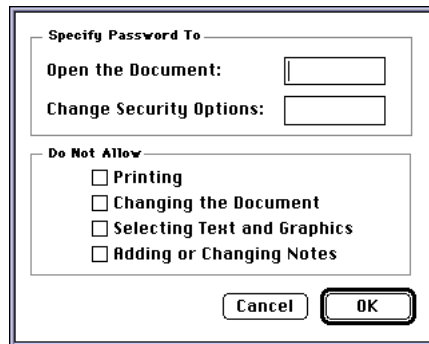
1) Open the PDF document using Acrobat Exchange.

2) Choose File → Save As.

```
┌────────────────────────────────────────┐
│        ▭ Macintosh HD ▼                │
│  ┌──────────────────────┐┌─┐           │
│  │📁 Apple Extras        ││⇧│ ▭ Macintosh HD │
│  │📁 Applications        ││ │           │
│  │📁 Documents           ││ │ ( Eject )  │
│  │📁 FC Designer         ││ │ ( Desktop )│
│  │📁 FirstClass Post Office││⇩│          │
│  └──────────────────────┘└─┘           │
│  Save PDF File As:            ( Save )  │
│  ┌──────────────────────────┐          │
│  │ ReadMe.pdf               │ ( Cancel )│
│  └──────────────────────────┘          │
│  ( Security... )                       │
└────────────────────────────────────────┘
```
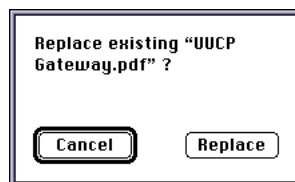
3) Click Security.

```
╔══════════ Password ══════════╗
║                              ║
║  This command is protected.  ║
║                              ║
║  Password: [              ]  ║
║                              ║
║        [ Cancel ]  [[ OK ]]  ║
║                              ║
╚══════════════════════════════╝
```

4) Type the password (softdoc) and click OK.

```
┌─ Specify Password To ──────────────┐
│                                    │
│  Open the Document:    [        ]  │
│                                    │
│  Change Security Options: [     ]  │
│                                    │
│  ┌─ Do Not Allow ────────────────┐ │
│  │  ☐ Printing                   │ │
│  │  ☐ Changing the Document      │ │
│  │  ☐ Selecting Text and Graphics│ │
│  │  ☐ Adding or Changing Notes   │ │
│  └───────────────────────────────┘ │
│                  [ Cancel ] [[ OK ]]│
└────────────────────────────────────┘
```

5) Click on any selected options to deselect them and click OK.

6) Keeping the same filename, click Save.

```
┌────────────────────────────┐
│  Replace existing "UUCP     │
│  Gateway.pdf" ?             │
│                            │
│                            │
│  [[ Cancel ]]   [ Replace ] │
└────────────────────────────┘
```

7) Click Replace.

You can now make changes to the PDF document.

Posting Acrobat documents online

The Documentation and Design department creates Adobe Acrobat PDF versions of all public documents and uploads them to SoftArc Online. The uploaded file is attached to a message describing the document and the usage restrictions placed on the document. The uploaded file consists of a copy of this message and the PDF document, together in a StuffIt archive.

Before posting the document, you must convert it to Acrobat format (refer to Chapter 13, "Creating Acrobat documents") for instructions.

This chapter provides procedures for the following topics:

- Creating the message

- Creating the ReadMe.PDF file

- Creating the StuffIt archive

- Sending the message

Creating the message

To create the message, follow these steps.

1) Open the conference to which you want to post the message.

2) Choose Message → New Message.

   The To field should contain the name of the conference.

3) If you wish to post the document to SoftArc Staff, for Cc, type SoftArc Staff and press Return.

4) For Subject, enter the title of the manual. Edit it to fit if necessary.

5) Click below the split bar and type your message. (You might find it easier to copy the text from the message for a similar product and paste it into this message.) The following table describes the contents of the message.

Manual title	For example, *Customizing FirstClass*. Use green 18 point bold Helvetica.
Platform	For example, *for Mac OS*. Use 12 point italic Helvetica. The platform should be followed by two blank lines.
Part Number	The text "Part Number" followed by the product part number.
Version	The text "Version" followed by the version number.
Edition	For example, *Second Edition*.
Date	The posting date, in the format <month> <dd>, <year>. For example, *March 27, 1996*. The date should be followed by one blank line.
Description of the document	Use material from the introductory chapters of the manual.
Changes since the last edition	In the second and subsequent editions, add a list of changes to the document since the previous edition. Include headings like the following: Changes since the third edition Changes since the second edition Changes since the first edition The headings should be in green 12 point bold Helvetica. Retain information about the changes to all previous editions, for people who haven't been paying attention.
Usage restrictions	Copy the appropriate boiler plate from SoftArc Documentation → Useful Dept Things → Boiler Plates. Some documents are restricted to the owners of a FirstClass Server (for example, *Customizing FirstClass*). Others are restricted to the owners of the product they document (for example, *FirstClass Gateway for cc:Mail*).

Note: The default font is Geneva 10 point. Unless indicated otherwise, text is in this font.

Creating the ReadMe.PDF file

The main PDF document must be accompanied by a PDF version of the message you just created. To create this ReadMe.PDF file, use the Tex-Edit application. Tex-Edit maintains FirstClass text styles and allows you to define the page size. Follow these steps.

1) Use the Chooser to select the Acrobat PDFWriter. This allows you to print simple documents directly to PDF format, without having to distill them.

2) In FirstClass, select the contents of the message and copy it to the clipboard.

3) In your System folder, open Tex-Edit.

   Tex-Edit creates a new, untitled document.

4) Paste the message.

5) Chose File → Page Setup.
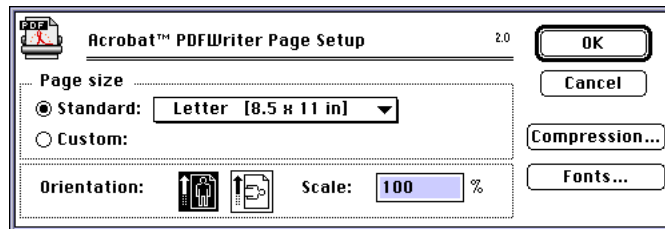
6) For Page Size, click Custom.
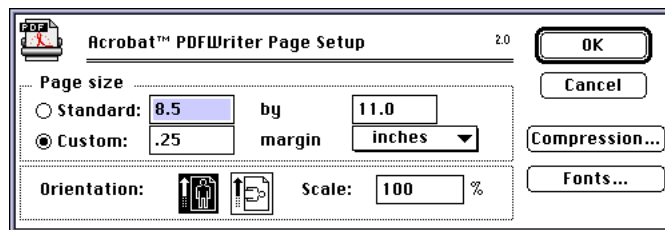
7) Enter a page size of 6.0 by 7.0 inches, with a 0.0 margin.
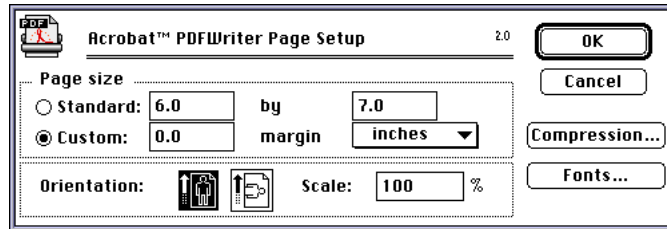
8) Click Compression.
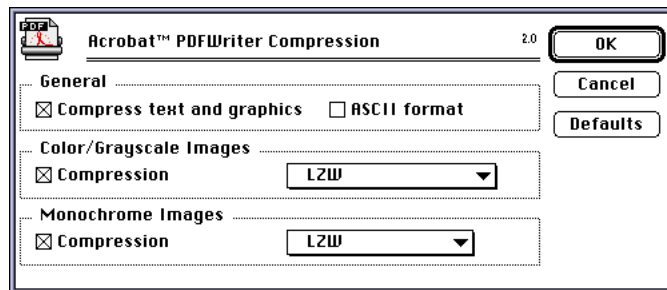
9) For General, select Compress Text and Graphics.

10) For color/Grayscale Images, select LZW compression.

11) For Monochrome Images, select LZW compression.

12) Click OK.

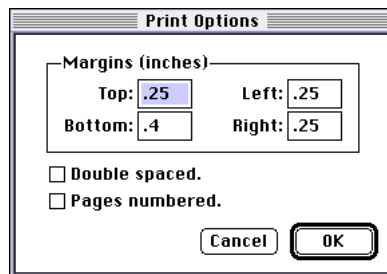You are returned to the Acrobat PDFWriter Page Setup dialog.

13) Click Fonts.
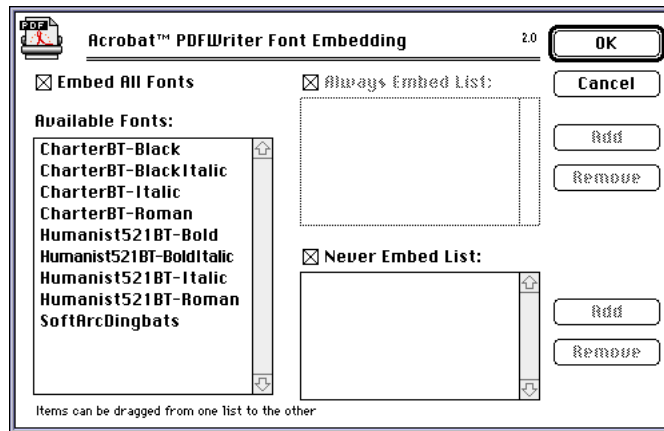
14) Click Embed All Fonts.

15) Click OK.

   You are returned to the Acrobat PDFWriter Page Setup dialog.

16) Click OK.

17) Choose File → Print Options.

18) Enter the measurements for the margins as follows, and deselect any other options:

   — For Top, enter .25.

   — For Bottom, enter 0.4.

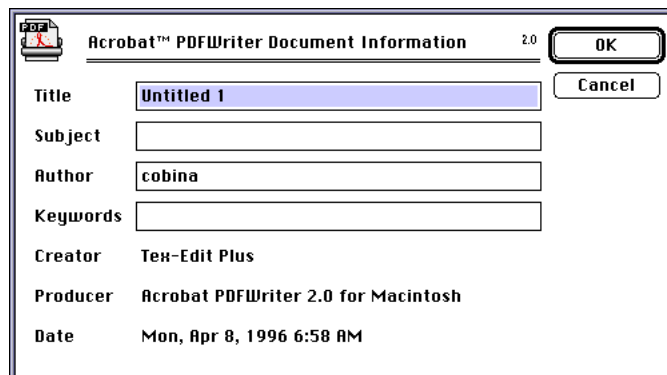— For Left, enter .25.

— For Right, enter .25.

19) Click OK.

　　Note: Once you've entered all these printing parameters, you should never have to enter them again. PDF Driver appears to remember its share of the parameters, and Tex-Edit appears to remember its share. All the same, it is still a good idea to make sure.

20) Choose File → Print.

PDF icon	**Acrobat™ PDFWriter**	2.0	**OK**
	Page Range: ◉ All　　○ From: [　　] To: [　　]		**Cancel**
	☐ View PDF File		
	☐ Short (DOS) File Names　　　☒ Prompt for Document Info		
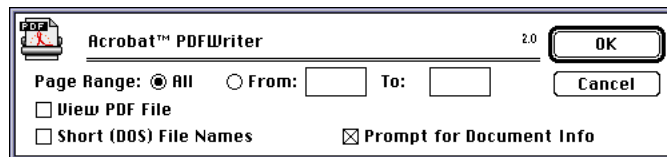
21) Select Prompt for Document Info, and click OK.

　　Note: Selecting View PDF File disallows Prompt for Document Info. If necessary, deselect this option.

PDF icon	**Acrobat™ PDFWriter Document Information**	2.0	**OK**
			Cancel
Title	Untitled 1		
Subject			
Author	cobina		
Keywords			
Creator	Tex-Edit Plus		
Producer	Acrobat PDFWriter 2.0 for Macintosh		
Date	Mon, Apr 8, 1996 6:58 AM		

22) For Title, enter ReadMe.PDF.

23) For Subject, enter the full title of the manual, the version number, and the edition number, using abbreviations, if necessary. For example:

> Gateway for cc:Mail, Version 1.0 for Windows, 1ed

24) For Author, enter SoftArc Inc.

25) For Keywords, enter a series of potentially useful keywords. For example:

> FirstClass, SoftArc, cc:Mail, ccMail, Gateway

26) Click OK.

```
┌──────────────────────────────────────────────────┐
│   ┌────────────────────────┐  ⊂⊃ Macintosh HD     │
│   │  ▦ Desktop ▼           │                      │
│   ├────────────────────────┤ ▲  ┌──────────┐      │
│   │ ⊂⊃ Macintosh HD        │ ▒  │  Eject   │      │
│   │ 🔵 Adobe Photoshop™ 3.0.4 alias│           │
│   │ 📁 Cobina              │    │ Desktop  │      │
│   │ 📁 Doc & Design        │    ┌──────────┐      │
│   │ 📁 Documents           │ ▼  │ New  📁  │      │
│   ├────────────────────────┤                      │
│   │ Save as...             │    ┌──────────┐      │
│   ├────────────────────────┤    │ Cancel   │      │
│   │ Untitled 1.pdf         │    ┌──────────┐      │
│   └────────────────────────┘    │  Save    │      │
│                                 └──────────┘      │
└──────────────────────────────────────────────────┘
```

27) Specify the location in which you want to save the file (for example, your desktop, or the project folder).

28) For Save As, enter ReadMe.PDF, and click Save.

29) Quit Tex-Edit. Don't save the untitled Text-Edit document.

30) Open the ReadMe.PDF document using Acrobat Exchange.

31) Choose File →Save As.
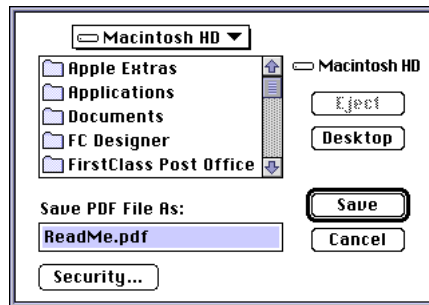
32) Click Security.
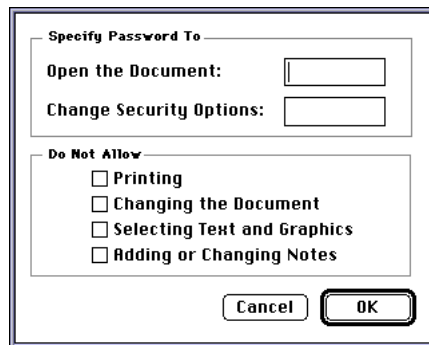
33) Leave Open the Document blank.

34) For Change Security Options, type the password "softdoc". (This field is case-sensitive, so type lower case letters.)

35) In the Do Not Allow section:

— Select Changing the Document.

— Leave the remaining options unselected.

36) Click OK.

37) Confirm the password and click OK.

    You are returned to the file dialog.

38) Click Save and replace the existing ReadMe.PDF file.

39) Quit Acrobat Exchange.

Creating the StuffIt archive

To create the StuffIt archive, follow these steps.

1) Find the DropStuff application. You should have it on your desktop. If
    you don't, get a copy of it from another member of Documentation and
    Design.

DropStuff™

2) Double-click on the application, to open it.

3) Choose File → Preferences.
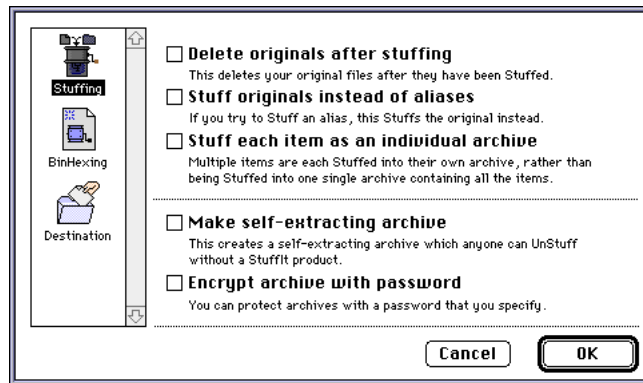
4) For Stuffing preferences, deselect all options.

5) Click the BinHexing icon.
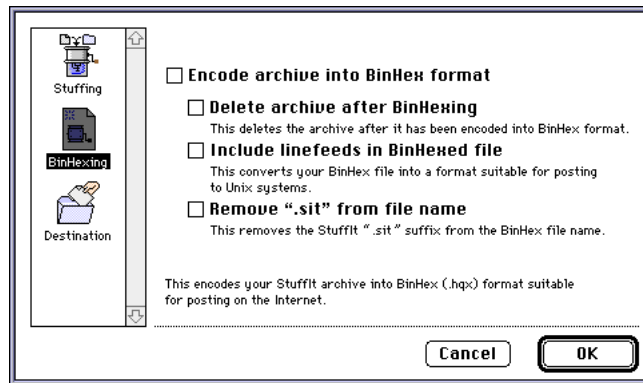
6) For BinHexing preferences, deselect all options.

7) Click the Destination icon.
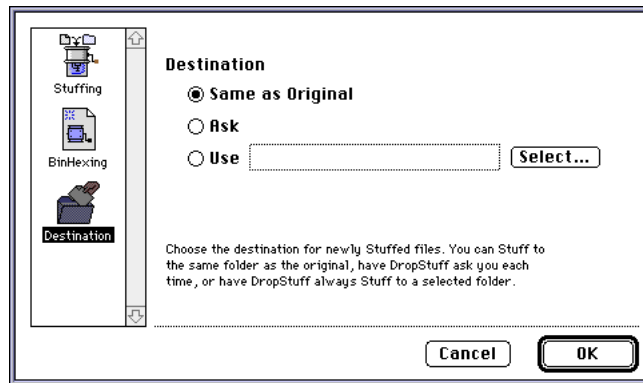
8) For Destination, select Same as Original.

9) Click OK.

10) In the Finder, create a new folder with the same name as the PDF manual you created, omitting the PDF suffix.

ccGate

11) Select the PDF manual and the ReadMe.PDF you created, and drag them to this folder.

12) Drag-and-drop the folder on DropStuff.

ccGate.sit

Sending the message

Now all you have to do is send the message. Follow these steps.

1) Return to FirstClass.

2) If you are replacing an older version of the same document, delete that message in the conference.

3) If you closed the unsent message, open it again.

4) Attach the new StuffIt archive to the message you created for the Product Documentation conference.

5) Send the message.

FirstClass users access information about our products from several different sources. Of course, we hope that they consult their manuals, either in printed or in electronic (Acrobat) format. However, they may prefer to access online help when they have a question. Presently SoftArc provides online help for our Windows products only, but we may provide Apple Guide help for Macintosh users in the near future. We also provide online help in the form of the server help folder.

All help files should adhere to the SoftArc style—refer to Chapter 3, "Language standards" for more information.

This chapter provides procedures for the following topics:

- Creating Windows help

- Creating Apple Guide help

- Maintaining the server help folder

Creating Windows help

We use Forehelp to create Windows help for all of our Windows applications. For information about how to use Forehelp, refer to *ForeHelp 2*.

Windows help should adhere to the SoftArc style (refer to Chapter 3, "Language standards" for more information). This section provides additional guidelines specific to Windows help. It lists the mandatory topics in Windows help files, and describes standards for text formatting, graphics and search keys.

Mandatory topics

Online help should contain *at least* the following topics:

- a Contents topic containing a list of all the highest-level topics in the help system

- a topic for each menu, describing the options it contains

- a topic for each dialog, describing the dialog and its fields

Text formatting standards

The following table lists the styles used in the Windows help files, and their shortcut keys.

Heading 1	Ctrl + 1	Used for topic titles. 18 point bold Arial.
Heading 2	Ctrl + 2	Used for subtitles within topics. 14 point bold Arial.
Heading—Fields	Ctrl + 3	Used for third-level headings. 10 point bold Arial.
Base	Ctrl + 0	The default style in ForeHelp, which is analogous to the Paragraph style in printed documents. 10 point Arial.
Indented	Ctrl + 9	Paragraph similar to Base, in which second and subsequent lines are indented .25 in.

When you insert bullets in Windows help, use the Indented format rather than the bullet option in Forehelp. Forehelp uses imported graphics for its bullets. As a result, the bullet is always on a white background. If the user changes the color of his or her document background, these bullets would look strange.

To insert a bullet, follow these steps.

1) Apply the Indented format to the text you want to bullet.

2) Place the cursor at the beginning of the first line of the text.

3) Insert a bullet character (Alt + 0183 in the Symbol character set), followed by a Tab.

Standards for graphics

Graphics inserted into Windows help must be in BMP format. (You can save graphics in BMP format with Paint Shop Pro.)

When you put a hotspot on a graphic in Windows help, ensure that the Hidden option is selected. If you do not select this option, Forehelp includes a frame around the hotspot.

Standards for search keys

When a user searches for a term, Windows help should take them to the place in the help topic where the term appears, rather than to the top of the topic. To ensure that this occurs, use the Text → Insert Text Keywords command to define keywords.

Getting rid of unreferenced graphic files in ForeHelp documents

As mentioned in , when you are working on a manual, you may sometime create graphic files that are no longer required. The same is true when you are working on a help file.

To get rid of graphic files that are not referenced in the final Forehelp document, follow these steps.

1) Create a temporary subdirectory in the directory containing the help source files. (Call it "temp".)

2) Move all graphics files (that is, files with the extension BMP and SHG) into this subdirectory.

3) Open the help file in Forehelp and display the first topic by choosing Topic → Go To, and then selecting the first topic in the list and clicking OK.

4) Page through the help file by pressing Alt + =. If a help topic contains more than one screen, scroll down through the entire topic. Look for gray boxes containing the text "Cannot open file" and a filename. This text identifies a missing graphic file.

5) Copy the missing graphic file from the temporary directory back into the directory containing the help source.

6) Press Alt + – and Alt + = to redisplay the screen. Make sure that it now contains the graphic file.

7) Delete the temporary directory.

Creating Apple Guide help

Apple Guide help is created with the Apple Guide Starter Kit. For information about how to use the Apple Guide Starter kit, refer to *Danny Goodman's Apple Guide Starter Kit*.

Apple Guide help consists of topic areas (similar to level 1 headings), subheadings, and topics.

Topic areas should usually be nouns, like "Gateways", "Databases", or "Shutdown". Subtitles should be one of the following topics:

- How do I

- Definitions

- Why can't I

- Why

If a topic is subordinate to "How do I", "Why can't I" or "Why", it should end in a question mark.

Terms subordinate to "Definitions" should be in the singular.

Maintaining the server help folder

The FirstClass Server contains a folder called Help, which stores documents that explain how to use the features of FirstClass. This section describes standards for these help documents, and explains how to update them.

Standards for help documents

Keep the following tips in mind when working on FirstClass help documents.

- Quotation marks should be "curly", not straight. To create a left quote ("), type Option-[; to create a right quote ("), type Shift-option-[. To create curly apostrophes, type Option-] and Shift-Option-].

- The online equivalent of Heading 1's are done in Green 18-point Geneva Bold. Heading 2's are in 10-point Geneva Bold, and regular text is in 9-point Geneva Roman.

- Avoid lists wherever possible; their spacing and formatting rarely survives a user's resizing the window in which they are contained.

- In most situations, after a period, there should only be one space, not two. However, for Command Line User Interface (CLUI) help, there should be two spaces after a period.

- When naming individual help files, number files on the same topic in a sensible order, to maintain a logical progression and enable users to find documents easily.

- When describing menu choices, the improvised replacement for the SoftArc Dingbats arrow is a dash and a greater-than symbol: –>

Updating the help folder

To update the help folder, log into your FirstClass Server as Admin. Open the document you want to edit, and change it as necessary. FirstClass saves the changes when you close the document.

Note: If you change the position or size of the windows, the changes will be saved. The next time a user opens the window, it will have the size and location you gave it.

Creating ReadMe files

Documentation and Design is responsible for the ReadMe files shipped with both our Macintosh and Windows products. Standards documented in Chapter 3, "Language standards" apply to ReadMe files as well as to printed documents. In addition, the following standards apply to ReadMe files.

This chapter provides procedures for the following topics:

- Creating Macintosh ReadMe files

- Creating Windows ReadMe files

Creating Macintosh ReadMe files

Macintosh ReadMe files are written in SimpleText.

Formatting standards

The following formatting standards apply to Macintosh ReadMe files.

Body text	10 point Geneva
Level 1 headings	These correspond to Heading 1 in FrameMaker documents. 18 point bold Geneva.
Platform	"for Macintosh" below the Level 1 heading. 14 point italic Geneva.
Level 2 headings	12 point bold Geneva, and preceded by two blank lines
Level 3 headings	10 point bold Geneva, and preceded by two blank lines
Bulleted lists	Press Option + 8 to insert a bullet. Bullets should be followed by one space. The second and subsequent lines of bulleted text are not indented.
Numbered lists	Enter numbers manually, followed by a period and one space. (Proof documents to make sure numbers are sequential.) The second and subsequent lines of numbered text is not indented.

Notes and Warnings   In a Note or Warning paragraph, the text "Note:" or "Warning:" is in 10 point bold italic Geneva.

Trademark information   9 point Geneva

For information on inserting symbols in Macintosh ReadMe files, refer to "Inserting symbols in Macintosh ReadMe files" on page 105.

Inserting graphics into Macintosh ReadMe files

To insert a PICT graphic into a Macintosh ReadMe file, follow these steps.

1) In the place where you want the graphic, insert the keyboard combination Option + Space into the file.

2) Copy the PICT to the clipboard in one of the following ways:

   — Open the PICT in Photoshop, and copy it to the clipboard.

   — If you are copying a graphic from another ReadMe file:

   a. In ResEdit, open that ReadMe file.
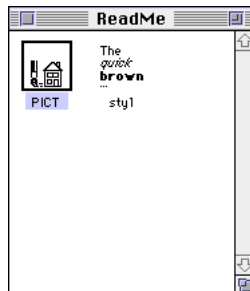
   b. Double-click on the PICT resource to display the PICTs in the file.
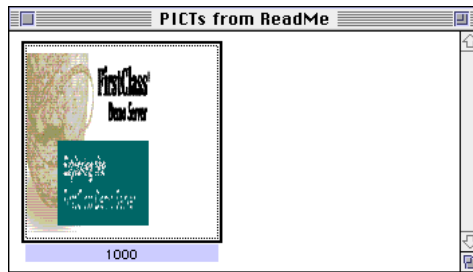
    c.   Select the PICT you want to use, and copy it to the clipboard.

3)   In ResEdit, open the file to which you want to copy the PICT.

4)   Paste the PICT into the ReadMe file.

5)   Assign the PICT the correct resource number. To insert the PICT at the first Option + Space in the file, assign it the resource number 1000. To insert it at the second Option + Space in the file, assign it the resource number 1001. To change the resource number, select the PICT and choose Resource → Get Resource Info.

6)   Edit the ReadMe file, adding blank lines so that the text does not overlap the graphic.

Converting to Read Only format

Before delivering Macintosh ReadMe files, convert them to TeachText Read Only format (ttro). To do so, follow these steps.

1)   Start ResEdit.

2)   From the ResEdit menu, choose File → Get File/Folder Info.

3)   Select the ReadMe file.

4)   For Type enter "ttro" (in lower case letters).

5)   Close the form and save the changes.

If you need to edit the file later, you must reverse this. To do so, repeat step 1 to step 5 above, but type "TEXT" (in upper case letters) for Type.

Creating Windows ReadMe files

Windows ReadMe files are written in Write.

Formatting standards

The following formatting standards apply to Windows ReadMe files.

Body text	10 point Arial.
Level 1 headings	These correspond to Heading 1 in FrameMaker documents. 18 point bold Arial.
Platform	The text "for Windows" below the main heading is in 14 point italic Arial.
Level 2 headings	12 point bold Arial, and preceded by two blank lines
Level 3 headings	10 point bold Arial, and preceded by two blank lines

Bulleted lists	Press Alt + 0149 (on the numeric keypad) to insert a bullet. After each bullet, press Tab. Bulleted lists should be indented.
Numbered lists	Enter numbers manually, followed by a Tab. (Proof documents to make sure numbers are sequential.) Numbered lists should be indented.
Notes and Warnings	In a Note or Warning paragraph, the text "Note:" or "Warning:" is in 10 point bold italic Arial.
Trademark information	9 point Arial

For information on inserting symbols in Windows ReadMe files, refer to .

Indenting lists

To indent lists in Write, follow these steps.

1) Select the text you want to indent.

2) Choose Paragraph → Indents.

3) For Left Indent, enter .25".

4) For First Indent, enter -.25".

Storing paper documents

After completing a document, you must file the paper documents so that anyone in the department can find them, if necessary. This chapter provides information and procedures on the following topics:

- Our Documentation and Design filing cabinet

- Our Documentation and Design library

- Storing old review copies

Our Documentation and Design filing cabinet

The filing cabinet in D&D contains a set of folders for each manual (organized by part number), plus a set of folders for the ancillary documentation accompanying each product. (Ancillary documentation includes ReadMe files and online help files.)

Each set consists of the following folders:

Information: Contains reference material useful for development or maintenance of the manual. This information might not actually be included in the manual. For example, the Information file for *Using FirstClass* has information about configuring Windows to work with IPX.

Outstanding issues: Contains review comments and information that needs to be considered for the next version of the manual. When you complete a manual, you should document any outstanding issues and file them here. If you receive comments on a manual that has been printed, file them here also.

Current drafts: Contains the latest draft of the manual.

Resolved issues: When you address issues from the Outstanding issues file, date and sign them, and insert them in this file.

You will notice that some of the older documents (like the Fax Gateway manual, for example) only have a single folder. These documents fall under an older numbering scheme (the Fax Gateway manual part number is 3004). When these manuals are updated, they will be migrated to the new

part number scheme (in which the Fax Gateway manual part number is 3320).

The filing cabinet also contains folders for departmental documents and information, such as the *SoftArc Style*, *Boiler Plates*, and the *Trading Cards*.

Our Documentation and Design library

At the time of the printing of this Style Guide, our Documentation and Design library consists of the following documentation.

Macintosh manuals

Server	FirstClass version 2.6 Administrator Manual (Mac)
	FirstClass version 2.6 Administrator's Supplement
	Using the Post Office Converter first edition
	Using the Post Office Converter second edition
Client	Getting Started version 2.6
	Using FirstClass version 3.1 for Mac OS
Designer	Customizing FirstClass version 3.1 for Mac

Windows manuals

Server	Administering FirstClass version 3.0
	Installing FirstClass version 3.0
	Getting Started version 3.0
Client	Using FirstClass version 3.0 for Windows
	Using FirstClass version 3.1 for Windows
Designer	Customizing FirstClass version 3.0 for Windows

Other manuals

CLUI manual	?
Gateway manuals	Gateway for cc:Mail (version 1.0 for Windows) Fax Gateway for Macintosh (version 2.0) Gateway for Microsoft Mail (version 1.0) UUCP Gateway (version 2.0 for Mac)
Protocol manuals	Inside Generic Box (?) AppleTalk Protocol Module IPX (not available until release 3.5) TCP/IP Protocol Module
Developers' manuals	Client Extension
Third party manuals	Hurdler
Diskette holders	FirstClass Server FirstClass Client FirstClass License Diskette FirstClass License Upgrade FirstClass Tools FirstClass Forms Editor

Foreign manuals

Japanese	FirstClass Client User's Guide version 2.5J FirstClass Administrators Guide version 2.5J FirstClass Client User's Guide version 2.0 FirstClass Administrator's Guide version 2.0 Client User's Guide version 1.0 FirstClass Administrators Guide version 1.0
Spanish	Cliente FirstClass Para Windows Inciaçao version 2.5 Manual do Administrador FirstClass version 2.5

Japanese	FirstClass Client User's Guide version 2.5J
	FirstClass Administrators Guide version 2.5J
	FirstClass Client User's Guide version 2.0
	FirstClass Administrator's Guide version 2.0
	Client User's Guide version 1.0
	FirstClass Administrators Guide version 1.0
German	FirstClass Client fur Macintosh version 2.5
	Benutzerhandbuch FirstClass Client (no version)
	FirstClass Bedienhandbuch Command Line User Interface
	Referenzekarte FirstClass Client
	FirstClass Klient programvare for Macintosh version 2.5

Other documentation

Reference cards	User Reference Card for FirstClass version 3.0 (Win)
	User Reference Card version 2.5 for Mac
	Windows Reference Card 95/04/10
	Windows Reference Card 96/02/13
	Mac Reference Card 95/04/10
	Installing FirstClass License Upgrades (first edition)
	Installing Server Licenses
Diskette holders	FirstClass Server
	FirstClass Client
	FirstClass License Diskette
	FirstClass License Upgrade
	FirstClass Tools
	FirstClass Forms Editor

Storing old review copies

UNDER CONSTRUCTION!

Archiving electronic documents

After completing a document, whether printed or electronic, you must copy it to the Database volume. This chapter provides information and procedures for the following topics:

- The Customer Documentation folder

- Archiving Acrobat documents

- Archiving Windows help files

- Archiving ReadMe files

The Customer Documentation folder

The Customer Documentation folder is located in Database → D-and-D. It contains the following folders:

- *3100 Primary Manuals:* Archives of *Installing FirstClass*, *Administering FirstClass*, *Using FirstClass*, and *Customizing FirstClass*.

- *3200 Reference Cards:* Archives of all reference cards, including the *Getting Started* card, Macintosh and Windows user reference cards, and the server license cards.

- *3300 Gateway Manuals:* Archives of all gateway manuals.

- *3400 Protocol Manuals:* Archives of the protocol module manuals, including the manuals for AppleTalk and TCP/IP.

- *3500 Options:* Archives of documentation for products in the 3500 series of part numbers.

- *3800 Developers' Manuals:* Archives of the developer documentation.

- *3900 Third Party:* Archives of manuals for third-party products sold by SoftArc.

- *Other Documentation:* Archives of Help files, ReadMe files, and other products that don't fit into the preceding folders.

- *Older Documentation:* Archives of documentation produced previous to Release 3.0.

- *Presentations:* Presentations developed by Documentation and Design.

- *Templates:* Current templates.

Each of these folders contains folders for one or more archived manuals. For example, 3100 Primary Manuals contains the following folders:

3100 Installing FirstClass

3110 Administering FirstClass

3120 Using FirstClass

3130 Customizing FirstClass

Structure of folders for printed manuals

The folders for the printed manuals contain the following items:

- A Stuffit archive of the latest version of the book, including all document files and graphic files, and any notes for future editions. The archive name should contain the version number.

- A folder for the Acrobat version of the latest Macintosh document. The folder title is in the format <nnnn>-M (where <nnnn> is the document part number); for example, 3130-M.

- A folder for the Acrobat version of the latest Windows document. The folder title is in the format <nnnn>-W (where <nnnn> is the document part number); for example, 3130-W.

- A folder for previous editions (only the regular FrameMaker files, not Acrobat).

Note: Sometimes the Macintosh and Windows instructions are combined in one document (for example, the configuration instructions in the CLUI manual), or there is only a Macintosh, or only a Windows, version.

The Acrobat folders contain the ReadMe.PDF file for the document and a Stuffit archive containing the document files and the PDF file.

Archiving Acrobat documents

After posting your Acrobat document (refer to Chapter 14, "Posting Acrobat documents online"), you should archive it on the Database volume. To do so, follow these steps.

1) Delete the following files from the folder containing the Acrobat version of your document:

   — the folder of illustrations (if you need it again, you still have the original folder safely stored with the printed version)

   — the PostScript files for the document and the cover

   — any other preliminary PDF documents still lying around

   The folder should contain only the FrameMaker document files, the Acrobat cover, and the PDF file.

2) Follow the procedure in "Creating the StuffIt archive" on page 191, excluding steps 10 and 11, to create a Stuffit archive and copy the archive to the Database volume.

Tidying up

After posting your document, copy the ReadMe.PDF file to the appropriate folder on the Database volume. Refer to "Archiving ReadMe files" on page 214.

Archiving Windows help files

Before archiving a help file, get rid of any graphic files that aren't referenced in the document. Then zip the help file and copy it to the Database volume.

Creating the ZIP file

To create a ZIP file, follow these steps.

1) Open an MS-DOS window.

2) Change to the directory containing the help source files.

3) Enter the following command:

   PKZIP <filename>.ZIP *.*

   where <filename> is the name of the subdirectory containing the help source files. For example, the FirstClass Client help files are stored in a subdirectory filename FCCLIENT. To zip them, enter the following command:

   PKZIP FCCLIENT.ZIP *.*

4) Open the File Manager and map a drive to the Database volume.

5) If necessary, in the CUSTOMER\OTHERDOC\HELP subdirectory, create a subdirectory with the same name as the subdirectory containing the help source files.

   If the subdirectory exists and it contains an existing help archive, rename the existing archive. For example, when you copy the help files for the FirstClass Designer 3.1 to the Database volume, rename the exiting help archive to FCDESI30.ZIP.

6) Copy the ZIP file to this subdirectory.

Archiving ReadMe files

The procedure you follow to archive ReadMe files depends on whether the they are Macintosh or Windows ReadMe files.

Archiving Macintosh ReadMe files

To archive a Windows ReadMe file, follow these steps.

1) If necessary, in the Customer Documentation → Other Documentation → ReadMe Files folder on the Database volume, create a subdirectory for the application for which you created the ReadMe file.

If the subdirectory exists and it contains an existing ReadMe file, rename the ReadMe file. For example, when you copy the ReadMe file for the FirstClass Designer 3.1 to the Database volume, rename the exiting ReadMe file to ReadMe30.WRI.

2) Copy the ReadMe file to this subdirectory.

Archiving Windows ReadMe files

To archive a Windows ReadMe file, follow these steps.

1) If necessary, in the CUSTOMER\OTHERDOC\READMEFI subdirectory on the Database volume, create a subdirectory for the application for which you created the ReadMe file.

    If the subdirectory exists and it contains an existing ReadMe file, rename the ReadMe file. For example, when you copy the ReadMe file for the FirstClass Designer 3.1 to the Database volume, rename the exiting ReadMe file to ReadMe30.WRI.

2) Copy the ReadMe file to this subdirectory.

Sending a manual for translation

The FirstClass Client is available in several different languages, including Portuguese, Japanese, French, and Italian, among others. To satisfy the needs of non-English speaking users, we are now starting to translate FirstClass manuals into other languages. To meet the needs of the translators, we must follow a few guidelines.

- When you conditionalize text, be sure to do so using full sentences, even if only one or two words are different.

  Correct: To install the FirstClass Client 3.1 for Mac OS software from a diskette, follow these steps. To install the FirstClass Client 3.1 for Windows software from a diskette, follow these steps.

  Incorrect: To install the FirstClass Client 3.1 for Mac OS Windows software from a diskette, follow these steps.

- Try to keep revisions in sync as much as possible. For example, if you update a Mac OS manual, update its Windows counterpart as well. If you don't have time to do this right away, be sure to do it as soon as possible.

- Always consider the impact of changes on the cost of translation.

- When revising a manual, use change bars, and also keep a written record of your changes. The translators need to know where we have made revisions, and they may not have the original to compare against.

  Note: Small changes, such as changes to capitalization, are irrelevant to some translations. For example, in German, all nouns are capitalized anyway, so this won't affect the translation. Try to find out which types of changes are important (or not) when a manual is going to be translated.

Using SyQuest

Since most FirstClass manuals are quite large, as a matter of practicality they are saved onto a SyQuest cartridge (a type of removable hard drive that can store up to 44 megabytes of data) to be sent out for translation.

Saving data onto a SyQuest cartridge

To save data onto a SyQuest cartridge, follow these steps.

1) Insert the cartridge firmly. Lock the drive door by sliding the thumb lever completely to the left.

    An orange light appears on the face of the drive and the drive begins to run.

2) An icon for the SyQuest drive appears on your desktop. If no icon appears at this point, restart your computer.

    A dialog opens, stating "This cartridge is ready for use!"

3) Click OK.

4) Double-click the cartridge icon.

5) Drag the manual files from your hard disk to the SyQuest window.

Ejecting a SyQuest cartridge

To eject a SyQuest cartridge, follow these steps.

1) Drag the icon to the trash, as you would to eject a CD-ROM or diskette.

2) Press the eject button on the front of the SyQuest drive.

    The orange light appears.

3) Slide the thumb lever all the way to the right.

    The cartridge ejects and can be removed.

Specific language considerations

Each language has its own unique properties and rules that can sometimes make translation less than straight-forward. Consequently, there are special considerations for each language into which we translate FirstClass manuals. As we gain experience with different languages, we will add to this section.

German

Since all nouns are capitalized in German, our standard of capitalizing menu items, and so on, for emphasis doesn't work very well. Instead, the translators choose between two ways to distinguish these names and commands from the "normal" text:

- They may use German smart quotes to enclose the whole menu command or field name (for example, New Settings would become "Neue Einstellungen").

- They may use bold text style to emphasize these words.

They decide which version should be used based on the documentation set of each customer and their way of formatting. In the case of SoftArc, they use a combination due to certain factors.

- As the manuals refer to menu commands as menu → menu item (Edit → Paste), quotes would look weird. Therefore, they use bold style (**Bearbeiten → Einsetzen)**. Bold is also used for button names.

- For other references to field names, dialog box titles, window names, form names, and so on, quotes are used.

- Some exceptions always apply. For example, the capitalization of tool names is not transferred into German using one of the above options. There they point out the "special name" of the tool by putting a hyphen between the tool name and the word "tool" (instead of using just one word).

Backing up D&D computers

Just as we recommend to our FirstClass administrators that they must back up their FirstClass post offices, just in case of emergency, we should also back up our computers for the same reason. Fortunately, this process has been automated, and you will not usually need to do anything but leave your computer on at the end of the day.

However, you should know how to step in and help if a problem occurs. This chapter provides information and procedures on the following topics:

- Backing up files

- Checking the Retrospect log for problems

- Restoring a file

Backing up files

The desktops of Documentation and Design department members are backed up nightly. Backups are scheduled to begin at 8:00 P.M.

Each member of the D&D department takes responsibility for the departmental backup for a week at a time, in turn.

Note: Full backups are not currently being performed due to time and space constraints, but there is a tentative plan to perform a complete backup of each person's computer on a rotating schedule.

When it is your week to take care of the backups, follow these steps each day.

1) Go to the computer "Little Ricky" on the spare desk in the D&D office.

2) Check that the read and write lights on the backup tape drive are not flashing. If they are, the tape drive is busy and you should come back later.

3) Open the Retrospect folder. The icon is in the top left corner of Little Ricky's desktop.
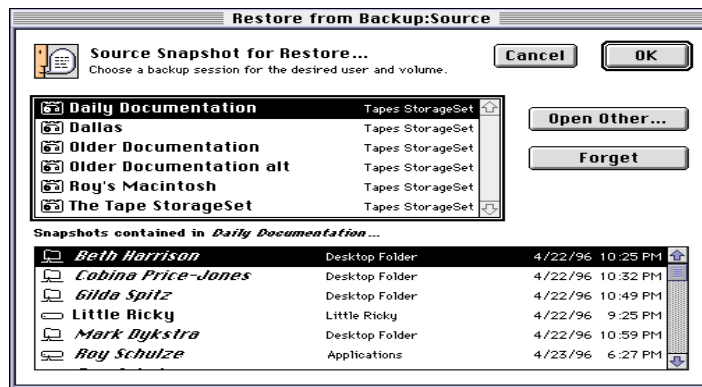
4) Find the file named Daily Documentation. This is a catalogue of the previous day's backup.

5) Hold down the Option key and drag Daily Documentation into the appropriate folder on the right side of your screen. If you aren't sure which folder to copy the catalogue into, look at the tape in the tape drive. It has a number between 1 and 20 on it. That is the folder to copy to.
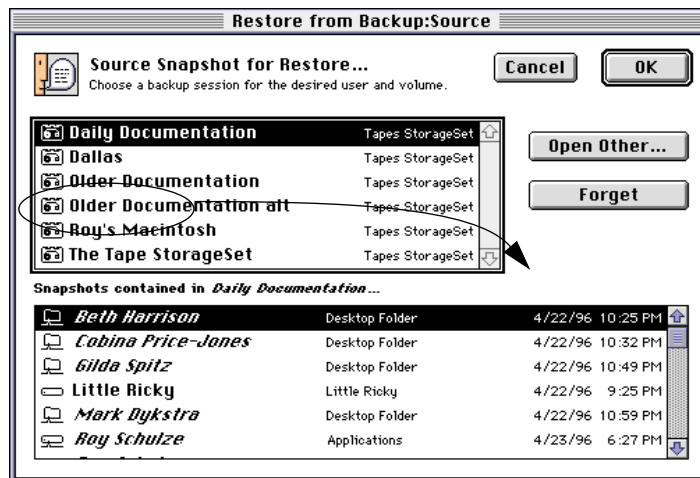
6) Retrospect asks if you want to replace the old Daily Documentation file. Click OK.

7) Press the button to eject the previous day's tape from the tape drive.

8) Label the tape case with the date of the backup (usually the previous day's date).

9) Put this tape into the glass labelled "Today's Tape". We keep the most recent backup handy.

10) Take the backup tape from two days ago (the one that was in the Today's Tape glass) to Neil Ragbar in the server room. Neil sends out our tapes for processing. He may give you some tapes that have been returned.

11) Insert the next tape in sequence into the tape drive.

Checking the Retrospect log for problems

If you are concerned that a problem may have occurred with the backup, check the Retrospect log for more information. To view the backup log, follow these steps. IS THIS THE FIRST STEP?

1) From the Retrospect Directory, select Reports.

2) Click Log.

```
╔══════════════════ Retrospect Log ══════════════════╗
  6,205 lines, using 255 K on disk
  ● Access failed: Remote Cobina Price-Jones in Testing,
         volume Desktop Folder, error -1028 (°Remote: not visible on network)

  - 5/1/96 6:43:53 AM: Copying Desktop Folder
    5/1/96 6:43:53 AM: Connected to Gilda Spitz in Testing
    5/1/96 7:35:31 AM: Comparing Desktop Folder
    5/1/96 7:45:39 AM: Execution stopped by operator
         Remaining: 1202 files, 36.8 MB
         Completed: 217 files, 12.5 MB
         Performance: 0.2 MB/minute (0.9 copy, 1.2 compare)
         Duration: 01:01:46

    5/1/96 7:45:39 AM: Execution stopped by operator
    Total performance: 0.6 MB/minute
    Total duration: 11:45:24
    Quit at 5/1/96 8:06 AM

  ∆ Retrospect version 2.1A+
    launch at 5/1/96 8:07 AM
    Quit at 5/1/96 8:10 AM

  ∆ Retrospect version 2.1A+
    launch at 5/1/96 8:15 AM
```

Restoring a file

The following section describes how to restore selected files from either the most recent, or a previous, backup.

Restoring from the most recent backup

To restore files from the most recent backup, follow these steps.

1) Make sure that the tape from the most recent backup is in the tape drive.

2) Open Retrospect.

3) Select Immediate from the Retrospect Directory, if it is not already selected.
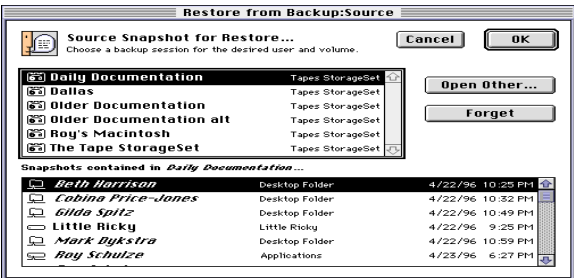
4) Click Restore.

5) Select Restore and click OK.

6) Select the source from which you are restoring by following these
    steps:

    a) From the upper list box, select Daily Documentation.

    b) From the lower list box, select the snapshot that you want to restore
    from (for example, the name of your own hard drive).

7) Click OK.

8) Select Retrieve files & folders.

9) Select the destination to which you want to restore your files. To save the files to a specific directory, click Subvolume.

10) If the folder to which you are saving your restored file already exists, double-click that folder.

11) If you wish to save the restored file in a new folder on your desktop, follow these steps:

a) Double-click the Desktop folder.

b) Click New.

c) Name the new folder.

12) Double-click on your new folder so that its name appears beside the Use field.

13) Click Use.

14) Click OK.

The Restore from Backup dialog outlines the options you have chosen.

15) To narrow the scope of the restore, click Files Chosen.

16) By default, all of the files in the directory are marked. If you do not want to restore the entire directory, click Unmark.
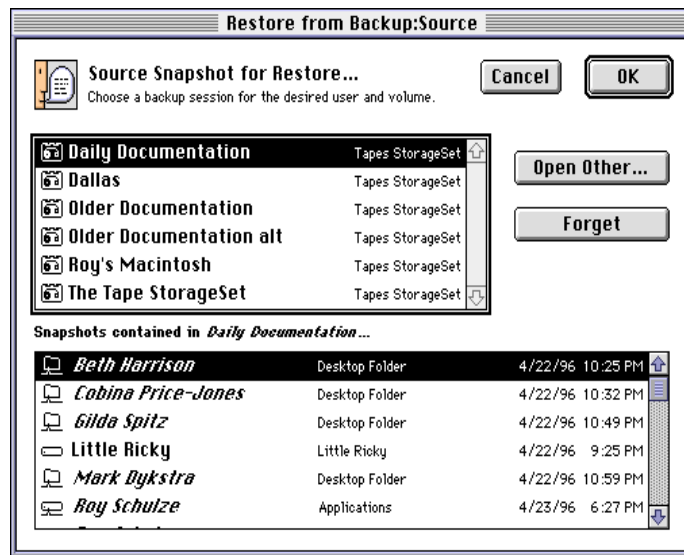
17) Mark the files that you want and close the dialog when you are fin-
ished.
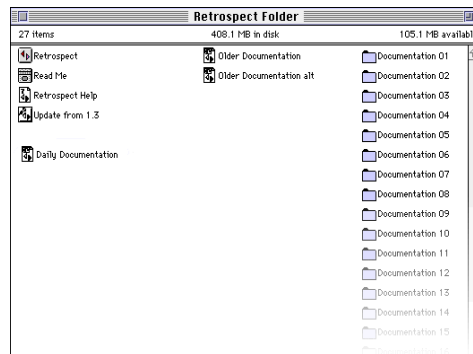
18) Click Restore.

19) Click OK to continue.

Restoring from a previous backup

To restore files from a previous backup, follow these steps.

1) Insert the tape containing the files that you want to restore into the tape drive.

2) Open Retrospect

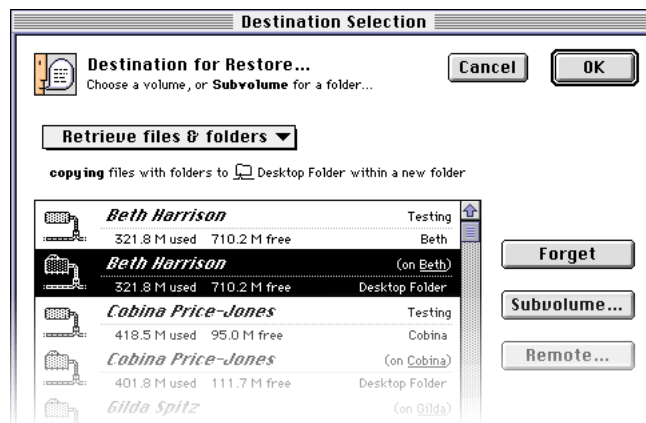3) Select Immediate from the Retrospect Directory if it is not already selected.
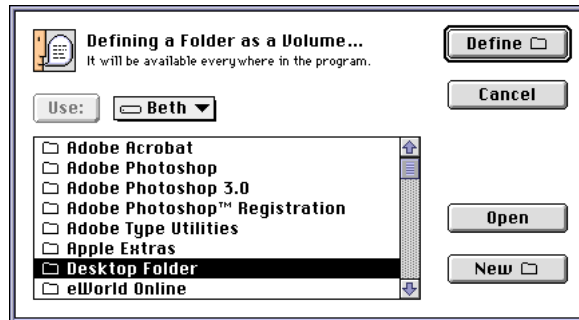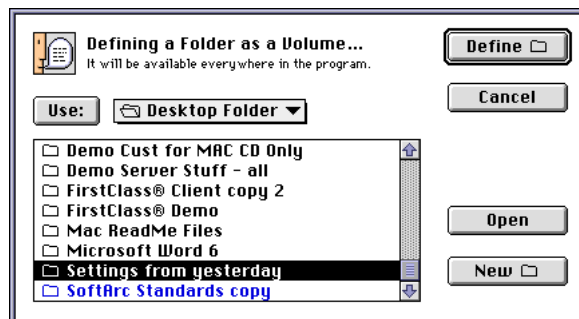

4) Click Restore.

5) Select Search and click OK.

6) Select the source from which you are restoring by following these steps:

    a) From the upper list box, select Daily Documentation.

    b) From the lower list box, select the snapshot that you want to restore from (for example, the name of your own hard drive).

7) Click OK.

8) Select Retrieve files & folders.

9) Select the destination to which you want to restore your files. To save the files to a specific directory, click Subvolume.
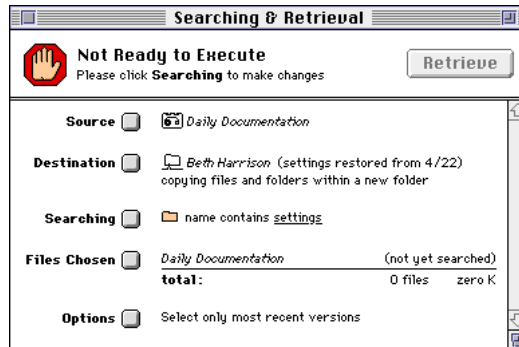

10) If the folder to which you are saving your restored file already exists, double-click that folder.

11) If you wish to save the restored file in a new folder on your desktop, follow these steps:
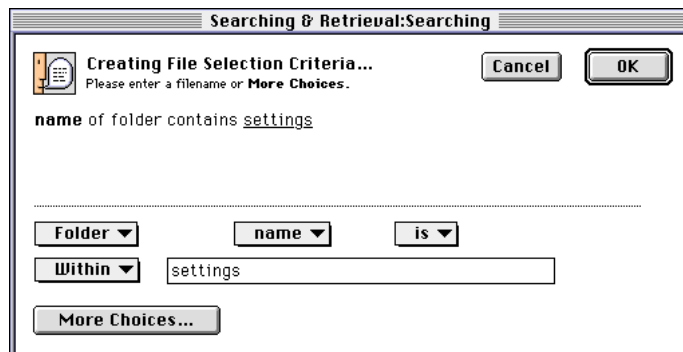
a) Double-click the Desktop folder.

b) Click New.

c) Name the new folder.

12) Double-click on your new folder so that its name appears beside the Use field.

13) Click Use.

14) Click OK.



15) Click Searching to select the files to be restored.

16) Type the name, or part of the name, of the file or folder that you are restoring. Using the pull-down menus, specify the search criteria. In the example above, Retrospect will restore any folder whose name is, or contains, "Settings".

17) Click OK.

Retrospect searches for the files that you have defined in your search criteria and displays the Ready to Execute Searching and Retrieval dialog.

18) Click Options → Select Only Most Recent Versions if it is not already selected.

19) Click OK.
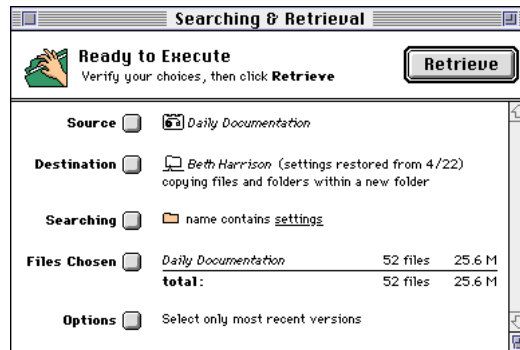
20) Click Retrieve to begin restoring the selected files.

21) Click OK to continue.

File sharing provides a convenient way for members of the Documentation and Design department to access each other's computers. For example, if you want to copy a file from another computer, instead of using the Softarc03 servers (which are almost always low on space), diskettes, or mail, you can use file sharing. To access another D&D desktop, follow these steps.

1) Choose Apple Menu → Chooser.

2) Click Appleshare.

3) In the AppleTalk Zones field, select Testing.
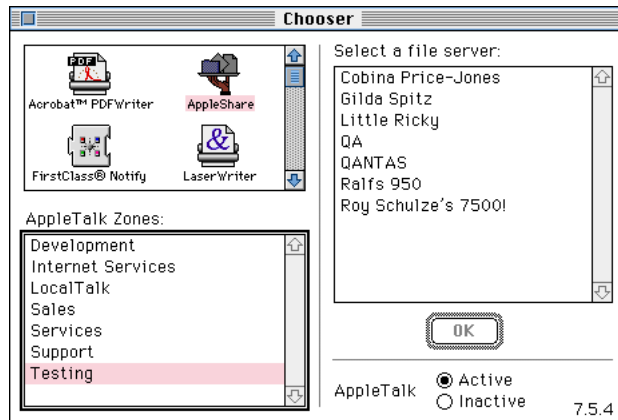
Under Select a file server, there is a list of available computers. If the computer you want to access does not appear in the box, it probably isn't turned on.

4) Under Select a File Server, select the computer that you want to access. In this example, we've selected Gilda Spitz.

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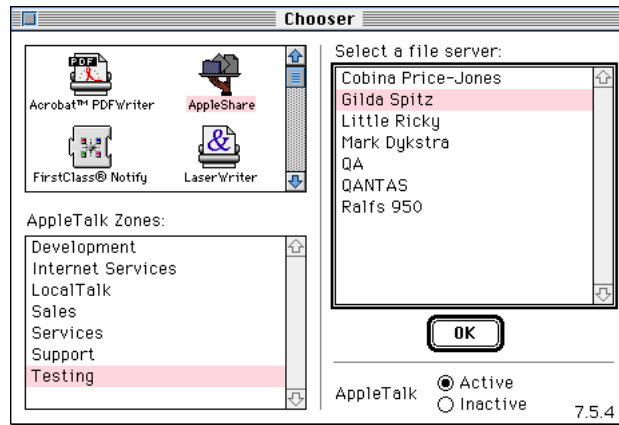
5) Click OK.

6) Enter your password.
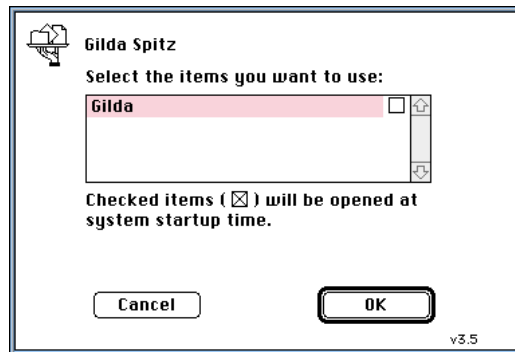
7) Click OK.

8) Click OK.

9) An icon for the other computer's hard drive appears on your desktop.

    Note: If you are using or copying a large file from the other computer, it will have an effect on that computer's speed and performance. Try to be considerate of the person you are borrowing files from.

10) When you are finished, drag the icon to the trash to disconnect.

Documentation and Design's scanner allows you to quickly convert a flat visual image into digital data. The scanner is located to the left of Little Ricky, the departmental Macintosh.

This chapter provides procedures on the following topics:

- [Previewing the original](#)

- [Scanning the original](#)

- [Touching up the scanned image](#)

Previewing the original

Previewing the original allows you to ensure that you aligned the original properly and that you don't scan more than you need. You can skip this section and proceed to , but we recommend that you don't. To preview the original, follow these steps.

1) Turn on the scanner (the switch is on the right side of the unit, near the back).

2) Open Adobe Photoshop. The Documentation and Design department owns two Photoshop licenses; if one is in use, try the other.

3) Lift up the cover of the scanner and place the original face down, flush with the bottom left corner of the glass.

4) Choose File → Acquire → PlugInScan v3.1.
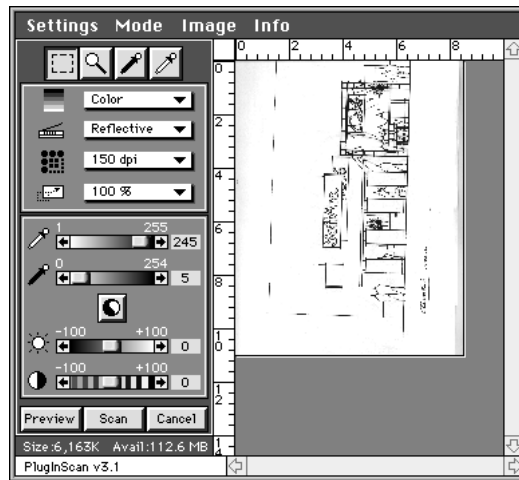
The last scanned image remains in the preview window.

5) You will use the following components of PlugInScan to preview and scan the original.

    Selection tool

    Scan Mode selection box

    Image Resolution selection box

6) Set the Scan Mode to Gray and the Image Resolution to 72 dpi.

7) Click Preview. The scanner begins to run. An image of the original appears in the preview window.

8) Click on the selection tool and select the boundaries of the image you wish to scan. Cropping the image now ensures you don't scan more than you need, saving on scanning time.
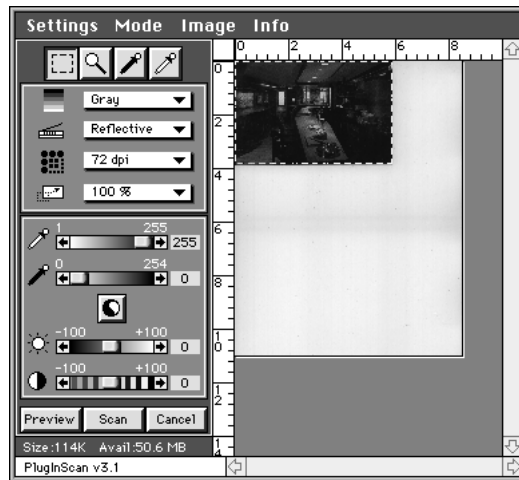
Scanning the original

If the preview is to your liking, you are ready to scan the original. To do so, follow these steps.

1) For Scan Mode, select Colors (or, if the original is black and white, select Gray).

2) For Image Resolution, select 72 dpi if the original is to be viewed online, or 300 dpi if it is to be printed on paper.

3) Because you have made changes to the preview, PlugInScan asks you if you need to preview again. Click OK.
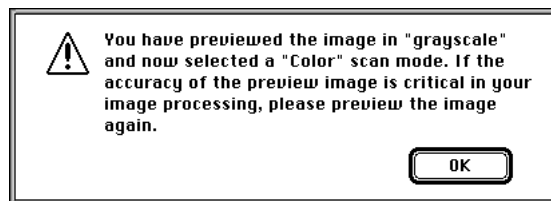
4) Click Scan.

5) The scanner begins to scan the original. If you have set the Scan Mode to Colors, the scan will take three times as long as the preview did; the scanner must pass once for red hues, once for green, and once for blue. When the scanner has finished, an image appears in a Photoshop file window.
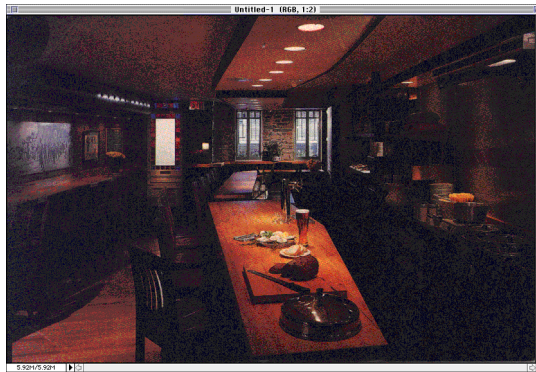
6) Choose File → Save As. Give your scan a filename so that you will not have to scan again should you make a mistake.

Touching up the scanned image

Your image may already be satisfactory for your purposes, but if you want to put some finishing touches on it, follow these steps.

1) Using the selection tool (from the top right corner of the floating palette), select the boundaries of the image you wish to keep.

2) Choose Edit → Crop to remove the unwanted areas of the image.

3) To adjust the brightness and the contrast of the image, choose Image → Adjust → Brightness and Contrast.
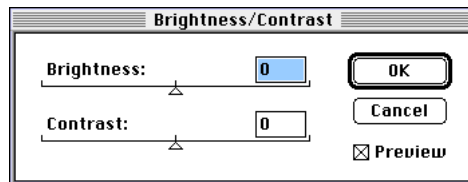
4) Drag the sliders to increase or decrease the brightness and the contrast.

5) When the brightness and contrast are satisfactory, click OK.

6) Choose File → Save As.

7) Give your image a new filename and save it as a PICT file in the folder you choose. You can drag the scan file you saved earlier (in) to the Trash.

8) Turn off the scanner and remove the original. Forgotten originals are hung on the Wall of Shame, so beware!

Writing e-mail, SoftArc style

Traditionally, writing has been for the eye, carefully written for someone else to read and learn from. Electronic mail has the same goals, but is a hybrid of spoken and written styles with one added element—it is usually very short. The primary goal is transfer of information in an efficient, concise way. E-mail to people outside SoftArc should be businesslike and straightforward and represent the company in as professional a manner as possible. To that end, keep the following tips in mind.

- Before you begin to write, have a fairly good idea of what you are about to try to communicate. Make sure you understand what you're writing about.

- E-mail should be pleasing to the eye; it should not be difficult to read or depressing to look at. Avoid big long blocks of text, and vary your sentence lengths.

- Avoid smileys or emoticons. They're cute, but anything they express should either be communicable through words alone or shouldn't be said at all.

- Paragraphs should be left-justified and have one line between them; don't indent.

- Text should be in black, 10-point Geneva, the default.

- Understand the proper use of different styles and punctuation devices like dashes and ellipses and use them, but sparingly.

- Sign corporate e-mail with your full name, title, and "SoftArc Inc.".

- Proofread everything before you send it. A message with spelling or grammatical errors looks as if you don't care about what you're trying to say.

Maintaining the glossary

Documentation and Design has a master glossary (named the Glossarus Maximus) that is used in all manuals. The master glossary is stored in the SoftArc Documentation → Useful Dept Things → Boiler Plates folder.

Each of our manuals should have its own glossary, a subset of the Glossarus Maximus. It should be contained in a separate file in the FrameMaker book, after the file containing the body text. (Some of our older manuals do not contain a glossary, or their glossary is part of the body text file. If you are revising one of these older manuals, you should change the manual structure to that described here.)

In the master glossary, we've defined a condition for each book in our documentation set. (For some books, we have defined additional conditions specific to the different platforms on which our products run.) To create a customized glossary for a specific book, follow these steps.

9)   Identify the terms to be included in the glossary.

10) If a term is not already defined in the Glossarus Maximus, research and write a definition. (Note that you are responsible for supplying definitions for terms in your manuals!)

11) Compile the list of terms, along with the definitions you have written, and submit them to the keeper of the glossary. Make sure you identify the books in which each term should appear.

12) The keeper of the glossary incorporates new terms and their definitions into the glossary.

13) The keeper of the glossary applies the appropriate conditions to each term and definition (entry) in your list. For example, if the entry will appear in *Administering FirstClass*, the keeper of the glossary applies the Admin condition. If the entry applies only to one platform of the manual (*Administering FirstClass for Windows*, for example), the keeper of the glossary applies the condition tag for that platform (in this example, Admin-W).

14) The keeper of the glossary posts the new glossary to the SoftArc Documentation → Useful Dept Things → Boiler Plates folder, with a note to SoftArc Documentation.

15) Copy the glossary from the Boiler Plates folder to the book folder on your Macintosh desktop.

16) Open the glossary and hide all conditions except those appropriate for your book. (For example, for *Administering FirstClass for Windows*, you would hide all conditions except Admin and Admin-W.)

17) Import variables from your body text file into the glossary file, and verify that the footers are all correct.

The remainder of this chapter describes the conditions used in the Glossarus Maximus, and provides detailed instructions for the keeper of the glossary.

Glossary conditions

The Glossarus Maximus contains the following conditions:

Admin	black	*Administering FirstClass*
Admin-M	green	*Administering FirstClass for Mac OS*
Admin-W	blue	*Administering FirstClass for Windows*
Cust	black	*Customizing FirstClass*
Cust-M	green	*Customizing FirstClass for Mac OS*
Cust-W	blue	*Customizing FirstClass for Windows*
Fax	black	*Fax Gateway*
Inst	black	*Installing FirstClass*
Inst-M	green	*Installing FirstClass for Mac OS*
Inst-W	blue	*Installing FirstClass for Windows*
MHS	black	*Connecting to MHS*
MServ	black	*Mac OS Services*
MSMail	black	*MS Mail Gateway*
None	red	Not included in any manuals

SMTP	black	*Connecting with SMTP and NNTP*
TCP	black	*Supporting TCP/IP Connections*
Text	black	*Text Services*
Using	black	*Using FirstClass*
Using-D	cyan	*Using FirstClass for DOS*
Using-M	green	*Using FirstClass for Mac OS*
Using-W	blue	*Using FirstClass for Windows*
UUCP	black	*UUCP Gateway*
WServ	black	*Supporting Windows Users*

Conditionalizing glossary entries

When the keeper of the glossary receives a list of glossary entries (possibly with definitions), he or she follows these steps.

1) When you work with the glossary, ensure that all conditions are showing. (This is especially important if you are creating cross-references.)

2) When you receive new entries, incorporate them into the glossary. (If the defintion is missing, ask the submitter to research and provide a definition.)

3) If the entries are already included in the glossary, and marked with the None condition, remove this condition. The quick way to do this is to select the text and press Control + 6.

   Note: Select the text by triple-clicking it. (Triple-clicking ensures that all associated cross-reference markers are also selected.) To extend the selection, hold down the Shift key and click in the paragraph to be selected.

4) Apply the new condition to the entries. Either use the Conditional Text dialog or follow these steps.

   a.   Select the text by triple-clicking it.

   a.   Press Control + 4.

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    b.   Type the first few characters of the condition name, until the correct name appears in the bottom left corner of the document.

    c.   Press Return.

5) Test the document by hiding all conditions except those required for the book for which you are conditionalizing the glossary. Exit the file, saving your changes, and then open it again. If FrameMaker reports unresolved cross-references, show all conditions and find and fix the unresolved cross-references. Most likely, you haven't applied the condition to the cross-reference marker.

6) Save the changes.

7) Post the new glossary to the Boiler Plates folder.

8) Send a message to SoftArc Documentation notifying the rest of the department that the new glossary is available.

Changing glossary definitions

From time to time, you may need to change a glossary definition. If the definition you need to change is used in multiple books, you should run the new definition past the other members of the department. To do so, submit the modified definition to The SoftArc Style, and ask the other department members for feedback. Once you have consensus, submit the new definition to the keeper of the glossary.

This appendix lists the following details regarding our templates:

- Paragraph formats

- Character formats

- Conditional text formats

- Cross-reference formats

- Master page layouts

- Table formats

- Reference pages

- Variables

- Master page layouts

- Conditional text formats

- How Acrobat templates differ from regular ones

For information on how to use these templates, refer to .

Paragraph formats

Name	Used In[a]	Description
Appendix #	B	Increments the appendix number; does not appear on printed document, but is used in cross-references
Chapter #	B	Same as Appendix #, but used for chapter numbers.
Cover Title 1		Used for the first line of the book title as it appears on the title page (for example, "Administering FirstClass").

Name	Used In[a]	Description
Cover Title 2		Used for the second line of the book title as it appears on the title page (for example, "for Windows"). .
Error message	B	Applied to the text of error messages. Contains a tab at .748", to allow the error numbers to be set off from message text.
Footer (Left)	M	Not included in the paragraph catalog; used on Master page.
Footer (Right)	M	See Footer (Left).
Footer (Part number)	M	Not included in the paragraph catalog; used on Master page in the Front matter file.
GroupTitleIX	I	Applied to group titles in index.
Header (Left)	M	See Footer (Left).
Header (Right)	M	See Footer (Left).
Heading 1	B	Chapter titles
Heading 1A	B	Appendix titles. Differs from Heading 1 in that the numbering is alphabetic, and uses a different series.
Heading 1ATOC	T	TOC entries for Appendices.
Heading 1A–noline-TOC	T	Applied manually to appendix TOC entries that begin at the top of the page, to remove the line that is usually printed above the entry.
Heading 1TOC	T	TOC entries for Chapters.
Heading 1–exclude	T	Used for headings that look like level 1 headings, but aren't included in the TOC, and don't have paragraph numbers. (For example, used for Contents.)

Name	Used In[a]	Description
Heading 1–no chapter number	I	Used for titles of major sections that don't have paragraph numbers, like the index.
Heading 1–no chapter numberTOC	T	TOC entry without chapter number.
Heading 1–noline TOC	T	Applied manually to chapter TOC entries that begin at the top of a page, to remove the line that is usually printed above the entry.
Heading 2	B	
Heading 2TOC	T	TOC entry for Heading 2.
Heading 2–exclude	B	Used for headings that look like level 2 headings, but aren't included in the TOC.
Heading 3	B	
Heading 3TOC	T	TOC entry for Heading 3.
Heading 3–exclude	B	Used for headings that look like level 3 headings, but aren't included in the TOC.
Heading 4	B	Level 4 heading. Level 4 headings do not appear in the TOC.
Indented	B	Indented .748 in. Can be used for error message explanations.
LevelIX	I	Applied to level 1 entries in the index.
Level2IX	I	Applied to level 2 entries in the index.
List entry	B	Applied to an entry in a bulleted list.
List entry (no bullet)	B	Same as above, but without a bullet. Can be used in numbered lists also.
List subentry	B	Applied to an entry in a bulleted sub-list.

SoftArc Standards

Name	Used In[a]	Description
List subentry (no bullet)	B	Same as above, but without a bullet. Can be used in numbered sub-lists also.
Numbered list entry	B	Applied to entries in a numbered list.
Numbered list first	B	Applied to the first entry in a numbered list. Starts list numbering at 1.
Numbered list subentry	B	Applied to entries in a numbered sub-list. Sub-lists are numbered alphabetically.
Numbered list subentry (first)	B	Applied to the first entry in a numbered sub-list. Starts list numbering at "a".
Paragraph	FB	
Subtitle	F	Applied to text below "FirstClass" on the title page. For example, "Version 3.0 for Windows".
Table heading	B	Applied to headings of columns in a table.
X–	B	Prefix used to identify customized tags.

a. Codes used in this section are: F (Frontmatter), T (Table of contents), B (body), I (index), and M (Master page).

Character formats

Name	Used in	Description
Cross-reference	B	Red. Used to identify cross-references in the Acrobat document.
Field name	B	*Italic.*
Note:	B	Format used for "Note", "Warning" and "Important" text.

Name	Used in	Description
Numbers	B	Applied to numbers, to make them less obtrusive in text. **Under development**.
Page number	B	Bold; applied to page number printed in header.
small caps	B	Small caps; applied to A.M. and P.M. text.
SoftArc Dingbat10	B	Used for small SoftArc Dingbats.
SoftArc Dingbat24	B	Used for large SoftArc Dingbats.

Cross-reference formats

Format	Example
Chapter n, "Title"	Chapter 1, "Introduction"
"Heading" on page n	"Where to go from here," on page 27.
page n	page 27
Paragraph text	
step n	step 3
step n on page p	step 3 on page 12
Title (Chapter)	Introduction (Chapter 1)

Conditional text formats

Format
Macintosh
UNIX
Windows

Table formats

Format	Description
Generic table	Defaults to a two-column table with column headings in Table heading format, and cell text in Paragraph format.
Icon table	Used for lists of icons followed by descriptions.

Variables

Variable
Edition
Part Number
Platform
Title
Version

Master page layouts

Name	Used in	Description
Left	FTBI	Can't be deleted.
Right	FTBI	Can't be deleted.
First	FB	Used for first page of chapters and appendices.
Last	FI	Allows part number to appear at end of book.

Reference pages

Name	Used in	
Reference	FTBI	(Can't be deleted)
TOC	T	
IX	I	

How Acrobat templates differ from regular ones

We have created a standard template to be used during the conversion of documents to Acrobat format. This template differs from the template for printed documents in the following ways.

- Cross-reference text is red.

- The background for chapter titles is in SoftArc teal.

- The header and footer placement does not alternate between left and right.

If you find any errors in the Acrobat template, feel free to update your copy of the template. But be sure to notify the keeper of the templates, so that the standard templates can also be updated.

This appendix provides all the useful information on trademark ownership that we've been able to gather, suitable for cut'n'pasting for the copyright page in Front Matter.

Note: As per the Chicago Manual of Style, the symbols ® and ™ need not be used in running text. We should, however, use them on the title page of a manual.

Alphabetical listing

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486 is a trademark of Intel Corporation.

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A/UX is a registered trademark of Apple Computer Inc.

B   BalloonHelp and BalloonWriter are trademarks of Apple Computer Inc.

C   Banyan and Vines are registered trademarks of Banyan Systems, Inc.

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D   DigiBoard is a registered trademark of Digi International.

DigiCHANNEL NU/Xi is a trademark of DigiBoard, Incorporated.

DiskDoubler is a trademark of Fifth Generation Systems, Inc.

DuoDisk and DuoFile are registered trademarks of Apple Computer Inc.

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EiconCard is a trademark of Eicon Technology Corporation.

Epson is a trademark of Seiko Epson Corporation.

EtherNet is not a trademark. No matter what anybody says.

EtherTalk is a registered trademark of Apple Computer Inc.

F   FDHD is a registered trademark of Apple Computer Inc.

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H   Helvetica is a registered trademark of Linotype-Hell AG and/or its subsidiaries.

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HyperCard is a registered trademark of Apple Computer Inc.

HyperTalk is a registered trademark of Apple Computer Inc.

I   IBM, OS/2, PC, and PROFS are registered trademarks of International Business Machines Corporation.

IPX is a trademark of Novell, Inc.

L   LaserWriter is a registered trademark of Apple Computer Inc.

LocalTalk is a registered trademark of Apple Computer Inc.

Lotus is a registered trademark of Lotus Development Corporation.

M   Mac, MacApp, MacBrowser, MacDFT, and
, are registered trademarks of Apple Computer Inc.

Macintosh, Macintosh Centris, Macintosh Common Lisp, MacintoshDuo, and Macintosh Quadra are registered trademarks of Apple Computer Inc.

MacTCP is a trademark of Apple Computer Inc.

MCI is a registered trademark of MCI Communications Corporation.

Microcom Networking Protocol and MNP are trademarks of Microcom, Inc.

Microsoft, MS, and MS-DOS are registered trademarks of Microsoft Corporation.

MultiFinder is a trademark of Apple Computer Inc.

N   NCSA Telenet is a trademark of NCSA Software Development.

NetWare and NetWare MHS are registered trademarks of Novell, Inc.

Newton is a registered trademark of Apple Computer Inc.

NLM is a trademark of Novell, Inc.

Norton Utilities is a registered trademark of Symantec Corp.

Novell is a registered trademark of Novell, Inc.

NT—See Windows NT

O   OneNet is a trademark of OneNet Inc.

Outland TCP Tool is a trademark of Outland Inc.

P   Pentium is a trademark of Intel Corp.

PhotoCD is a trademark of Eastman Kodak Co.

PostScript is a trademark of Adobe Systems Incorporated, which may be registered in some jurisdictions.

PowerBook is a registered trademark of Apple Computer Inc.

Power Macintosh is a trademark of Apple Computer Inc.

PowerPC is a trademark of International Business Machines Corp.

PowerTalk is a trademark of Apple Computer Inc.

PKZIP is a registered trademark of PKWARE Inc.

Q   QuickTime and QuickTime Player are trademarks of Apple Computer Inc.

R   ResEdit is a trademark of Apple Computer Inc.

Retrospect and Retrospect Remote are registered trademarks of Dantz Development Corporation.

S   SmartIcons is a trademark of Lotus Development Corporation.

SoundBlaster is a registered trademark of Creative Technology Ltd.

Sprint is a registered trademark of Sprint Company.

Stuffit is a trademark of Aladdin Systems, Inc.

SuperPaint is a registered trademark of Aldus Corporation.

System 7.5 is a trademark of Apple Computer Inc.

T   TCP/Connect is a trademark of InterCon Systems Corporation.

Telebit and Trailblazer are registered trademarks of Telebit Corporation.

U   UNIX is a registered trademark of Novell, Inc. in the United States and other countries, licensed exclusively through X/Open Company, Ltd.

V   Ven-Tel is a trademark and Pathfinder is a registered trademark of Ven-Tel, Inc.

W   Windows® is a registered trademark of Microsoft Corporation.

Windows NT® is a registered trademark of Microsoft Corporation.

Windows NT Server and Windows NT Workstation are trademarks of Microsoft Corporation.

Also useful

All other product names are owned by their respective companies.

How to review a SoftArc manual

This appendix is an adaptation of the PowerPoint presentation that Documentation and Design has prepared to help other SoftArc departments understand the documentation cycle and how to review drafts correctly.

Overview

Good documentation enhances the image of the product. Bad documentation, on the other hand, can make even a brilliant product look bad. It can result in poor product reviews, loss of sales, and increased Technical Support calls. While people seldom compliment good manuals, they don't hesitate to complain about bad ones.

You can help us produce good documentation by reviewing our manuals carefully. When you review the documentation, the kinds of things you look for can be divided into two categories: style and substance.

Style includes such things as language use, spelling, grammar, and page layout. We hope to eliminate all style errors before you see the document, but if any slip by, please let us know. This document describes some of the style guidelines we follow in the development of manuals.

Substance includes the technical accuracy and completeness of the manual. When you are reviewing for substance, the kinds of things you look for depend on two things: the SoftArc department to which you belong, and where the document is in the documentation cycle. This document provides guidelines for each department, and describes what to look for at each phase of the documentation cycle.

The SoftArc style

We in Documentation and Design have a Style Guide that we follow when writing all documentation, including printed manuals, online help, and ReadMe files. The goal of the Style Guide is to ensure that all members of the department produce documentation that is consistent in its appearance. The Style Guide continues to evolve as we discover more things that have to be standardized. If you would like to see a current copy, just ask one of us.

These are some of our standards:

- Use active voice and present tense.

- Use upper and lower case in these words as follows: desktop, user ID, mailbox, post office, settings document.

  Note: We use the term "settings document" rather than "settings file".

- Hyphenate these words as follows: online (no hyphen), cross-platform, multiplatform, and multivolume. Never hyphenate SoftArc or FirstClass.

- Use *log in* and *log off*, not *log on* and *log out*.

- Avoid sexist language (that is, referring to users as "he" or "she"). Never ever use *s/he* or *he/she*.

- Don't use Latin abbreviations like e.g. and i.e.

Giving us the benefit of your expertise

Members of different departments should look for different things in their reviews.

Marketing: Many manuals contain scenarios that illustrate the use of the product in a fictional company (Veritec). Focus on these scenarios and the rest of the introductory information.

- Do the scenarios illustrate realistic uses of the product, and do they draw attention to its most important features?

- Is the product positioning correct? That is, does the manual address the correct market? Is the product image conveyed by the manual consistent with SoftArc's marketing strategy?

- Does the document use terminology consistent with that of SoftArc's marketing documents?

Development: Focus on the technical information.

- Is the information technically correct?

- Are all important features documented?

- Is information about non-SoftArc products (like Microsoft Mail or Windows NT) correct?

- If the document is designed for one platform only, does it contain information that is incorrect for this platform? If the document is designed for both platforms, does it contain the necessary information for both? Does the document describe all differences between the platforms?

Quality Assurance: Focus on the technical information.

- Is the information technically correct?

- Are all important features documented?

- Is information about non-SoftArc products (like Microsoft Mail or Windows NT) correct?

- If the document is designed for one platform only, does it contain information that is incorrect for this platform? If the document is designed for both platforms, does it contain the necessary information for both? Does the document describe all differences between the platforms?

- Can you follow the instructions, and does the system respond as documented?

Technical Support: Focus on the step-by-step instructions.

- Is the information easy to find and easy to understand?

- Can you see any potential areas of confusion?

- Is the contact information (phone number, fax number, Internet address, and so on) correct?

- Can you follow the instructions, and does the system respond as documented?

- If the document is designed for one platform only, does it contain information that is incorrect for this platform? If the document is designed for both platforms, does it contain the necessary information for both? Does the document describe all differences between the platforms?

***Training:*** Focus on the step-by-step instructions and the order of the procedures.

- Can you see any potential areas of confusion?

- Is the contact information (phone number, fax number, Internet address, and so on) correct?

- Can you follow the instructions, and does the system respond as documented?

- Is there anything that you would teach in a different order?

- If the document is designed for one platform only, does it contain information that is incorrect for this platform? If the document is designed for both platforms, does it contain the necessary information for both? Does it document all differences between the platforms?

Operations: Focus on the sections about registering the product and obtaining product updates, as well as lists of products.

- Is this information accurate?

- Are part numbers and product names correct?

- Does the manual correctly describe the contents of the package?

The documentation cycle

The following diagram illustrates the documentation cycle. Generally, what you should look for in your review depends on where you are in the documentation cycle. Look for major items earlier in the cycle; concentrate on details later on.
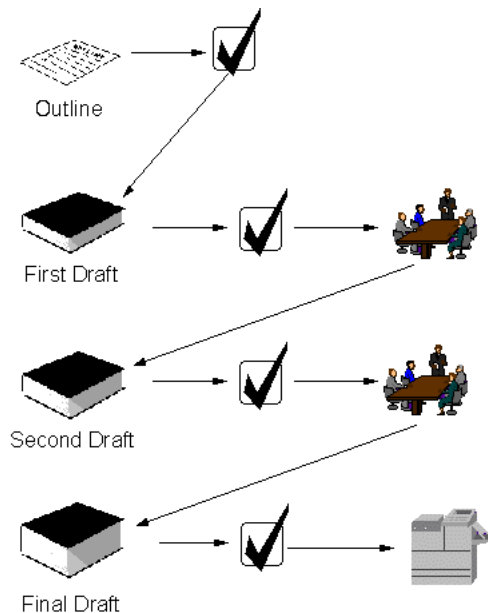
For many documents, we produce three drafts. For some, however, fewer drafts might be sufficient. For example, if we receive very few comments on the first draft, we might choose to produce only two. Or, if we are producing two versions of the same manual, one for the Windows platform, and one for the Macintosh manual, we might produce three drafts of the first manual, but only two of the second one.

Outline

The first phase in the documentation cycle is the development of an outline. When the outline is complete, we distribute it for review.

In your review, check for missing topics. Outlines for similar products, such as gateways, will be similar, but the current product might need extra information or a different treatment of similar information. Although you might not notice that something is missing or different until later on in the documentation cycle, if you can notify us at the Outline stage, you make our job much easier.

First draft

Based on the outline and the input from reviewers, we prepare a first draft and distribute it for review. In your review, do the following.

- Ensure that all information in the draft is technically accurate.

- Ensure that there is no missing information. This is harder than reviewing what IS there, so we need you to really think about this. If we have missed any steps or procedures, please list them.

- If applicable, list any planned changes to the software that you may know about (either to the way it will function or the way it will appear on the screen).

We ask reviewers to sign off on the draft, to indicate that they approve of the draft contents if the requested changes are made. (For more information about signoff sheets, refer to .) If reviews contain conflicting comments, we chair a review meeting to discuss these comments.

Second draft

We revise the document based on the review comments, using change bars to identify all significant changes. When we don't use major review comments, we try to follow up with the originator, explaining why. (Sometimes we will defer changes to a future release of the document.)   Then, we distribute a second draft for review and signoff. In your review, do the following.

- Check that all your major recommended changes from the first draft have been incorporated. We keep all review comments on file in the Documentation and Design department, so you can refer to your comments (or those of other people) at any time.

- Note any style errors, such as language, spelling, or typos.

- Ensure that the illustrations are accurate and sufficient.

- If applicable, list any planned changes to the software that you may know about (either to the way it will function or the way it will appear on the screen).

Again, if necessary, we chair a review meeting.

Final draft

Finally, we revise the document based on comments from the second review, and distribute it for final signoff. In your review, do the following.

- Check that all your major recommended changes from the second draft have been incorporated. (If they haven't, there may have been a conflict with someone else's recommendations—ask us about it, if you think there is still a problem.)

- Note any style errors, such as language, spelling, or typos.

- Ensure that the illustrations are accurate.

ReadMe files and online help

After the content of the printed documents is finalized, we begin work on the ReadMe files and online help. Since most of the content of these documents is taken from the printed manual, they only undergo two reviews.

In your review of ReadMe files, ensure that they document all last-minute changes to the product.

In your review of online help, test the jumps and popups, to make sure that they work correctly.

Signoff sheets

With each draft we circulate for review, we will include a signoff sheet. The sheet contains the following items:

- a list of things you should look for in your review

- the date that the document is due back from review. All documentation scheduling is based on the assumption that the document will be

returned by this date. If it is not, we might not be able to finish the document on time.

- a place for you to sign, to indicate that you have reviewed the document, and approved it based on your review comments

If we don't receive your signoff sheet, we'll have to assume that you agree with everything in the document!