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Newmerix Documentation Processes & Style Guide

Introduction

Use this style guide when creating Newmerix documentation. This guide includes:

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Project/File Naming Conventions

When you are going to update the Framemaker files in a project, copy the source files from the S drive (S:\Engineering\Product Documentation) to your hard drive.

Use the following guidelines when setting up a project for update:

- ▶ When you go to copy existing files from the S drive to update documents for a new release, make sure that the Framemaker book file name matches the name of the expected output file. See [Project Deliverables/Filenames](#)

NOTE: I ran into a weird problem with a project. I generated a pdf of a book, then renamed the pdf file to match the expected deliverable file name and suddenly the Table of Contents links no longer worked. Once I renamed the Framemaker book file to match the output file name then regenerated the pdf file, the problem disappeared. So best practice is for the book file name to match the output file name.

- ▶ Don't include release numbers in the Framemaker file names because if you do, you'll have to rebuild the book when you copy the files for the next release. When a book name changes, cross references may break.
- ▶ Don't include chapter numbers in the file names. If you do and you later have to rearrange the chapter numbers because a chapter was added/deleted, you'll have lots of tweaking to do in the book list, chapter number numbering, and cross-references.

Project Deliverables/Filenames

Find out where the finished project files are to be kept and what the expected file names should be. Make sure that the final files you create use the same names so the build includes the files.

I didn't find out the expected names for A!Test until a few months on the project. When I created the Framemaker folder and book file for the new release, I included the release number in the file name, and called it User Guide instead of User Manual. So, when I pdf the entire book, the default pdf name is the same as the book file - which in this case differs from

the expected output name. So every time I generate a pdf file, I have to be sure to rename it so it matches the final file name - a real pain!

NOTE: Get set up to check the final files into their final destination so they are ready for the product builds. Copies of all released documents should be put on http://intranet/docs/ Shared%20Documents/Forms/AllItems.aspx so anyone in the company can pick them up when needed.

Automate!Test Deliverables

For example, the following shows the expected file names for the Automate!Test deliverable files:
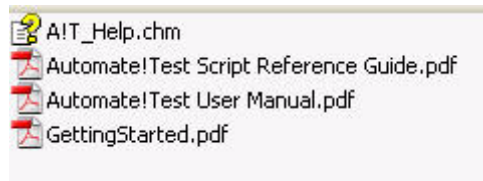
NOTE: Make a master list of the deliverables for all projects; including location of where they need to be for the build.

Automate!Control Deliverables

add list

Automate!Change Deliverables

add list

Automate!Change for SAP Deliverables

File names:

▶ ACSAP_Install_Guide.pdf

▶ ASCAP User Guide.pdf

Content for the documentation is provided by Chet Hodgins.

Save the Framemaker surce files as rtf and send to Chet with change tracking turned on so he can edit the document.

Using Version Control

Currently, the final files for a release are checked in/out using Visual Source Safe. A new tool will be used shortly. Once the new tool is decided, this section should explain how to check files in/out.

Contents & Layout for Guides

The topics in this section include:

- [Headers/footers](#)
- [Front Matter](#)
- [Anchored Frames/Graphics](#)

Headers/footers

- Page numbers in footers do NOT alternate left/right but always appear on the right side of the page.
- Page numbers include chapter number, space, dash, space, page number
- The Product name immediately followed by the manual name is on the left side of the footer, with the manual title initial caps.
- Footers are 9 pt Ariel
- Headers do not appear on the first page of a chapter and are not used in the TOC

Title Page

The title page template file to be copied for your manual is at \\Mail\newmerix\Engineering\Product Documentation\Doc_Standards&Procedures\Title & Legal_Template.fm, You'll have to edit the file and display the Master page to change the book name to match your project.

Front Matter

The first chapter in each manual should contain an introduction to the guide, a revision history table, description of the document set, conventions used in the manual, glossary, and how to get help from tech support and how to contact Newmerix.

Audience

Briefly describe who the audience is and what they should know.

Before You Begin

Describe any prerequisites

Revision History Table

All User Guides and Install guides should have a 2 column Revision History table in the front matter that identifies the revision number, and a brief description of what changed in that release. Provide information that helps the user focus on new information.

Conventions

Use the following conventions:

| Item	Description
Test > Recording > New Test Script	Words separated by > with spaces on either side indicate a sequence of menu and sub-menu commands. In a step, say "Select" followed by the menu choices, then specify where the items are found (for example, from the menu bar).
`NxParam("<PARAMETER FILE MAPPING>")`	Courier type indicates sample script code or literal text for you to enter into a field. Courier Standard should be used since some customers copy/paste code examples and courier standard font is best for displaying code. Make sure quote marks are straight (") rather than angled
<option name>	Words enclosed in angle brackets < > and in italic font indicate places where you are to substitute the appropriate optional text.
[Hyperlinks](#)	Hot-linked references to other topics/sections are underlined and are in blue font in the FrameMaker source file
Press `Enter`	The word "Press" followed by a word in courier font indicates a key on the keyboard to press.
Click **OK**	The word "click" followed by a word or words in BOLD CAPS indicates a button in a dialog box to press. Do **not** say "Click the OK button" or "Click on ...".
Options...	If a button name on a dialog box has three dots after the name (...), it means that clicking the button will bring up a secondary dialog box. If a button name is NOT followed by three dots, clicking the button makes the action occur immediately. A warning typically will display asking you to confirm the action. You can click Cancel. Once you click OK, the action can't be undone
Procedures with Numbered steps	▶ When documenting a procedure, always start with the action followed by the result. The action will be the numbered step and the result will be a separate paragraph with the ListContinue1 style applied so it is indented the same as the numbered step. ▶ Except when telling users to select a menu choice such as Test > Recording > New Test Script, multiple actions should be documented in separate steps, followed by the system response.
Cautions/Warnings	Use the paragraph style called Important instead of Caution or Warning
Log In/out	Use "log in" or "log out" rather than "log on" or l"og off"
user name	Use "user name" rather than "username" or "user-name"

Other Conventions

▶ Use present tense and active voice

▶ Use Newmerix Corp. instead of Newmerix Corporation

▶ Say "you" rather that "the user"

▶ The headings for any procedural topics should start with "How To" so they can easily be differentiated from introductory or background topics in the TOC of a guide or in the online help.
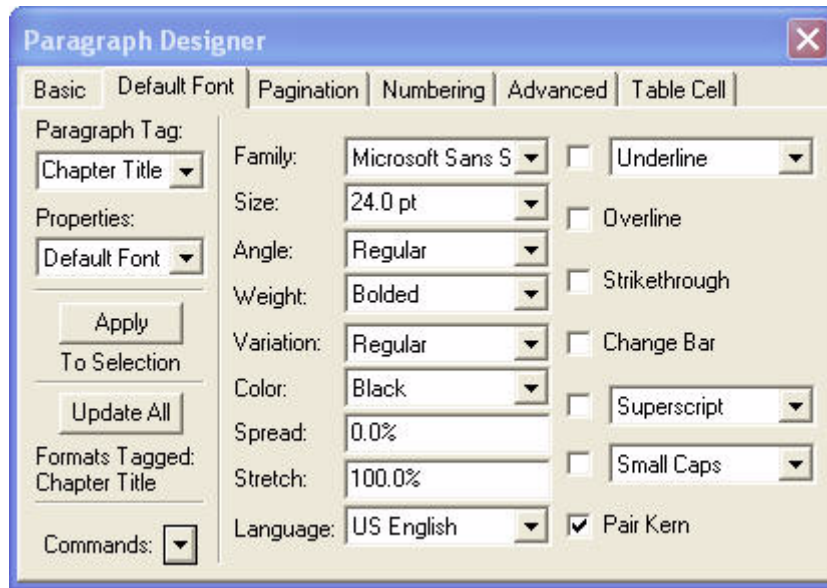
Chapter layout

On the first page of a chapter, the chapter number should be on a separate line from the chapter title.

Apply the chapnum style to the chapter number paragraph (see below for definitions).
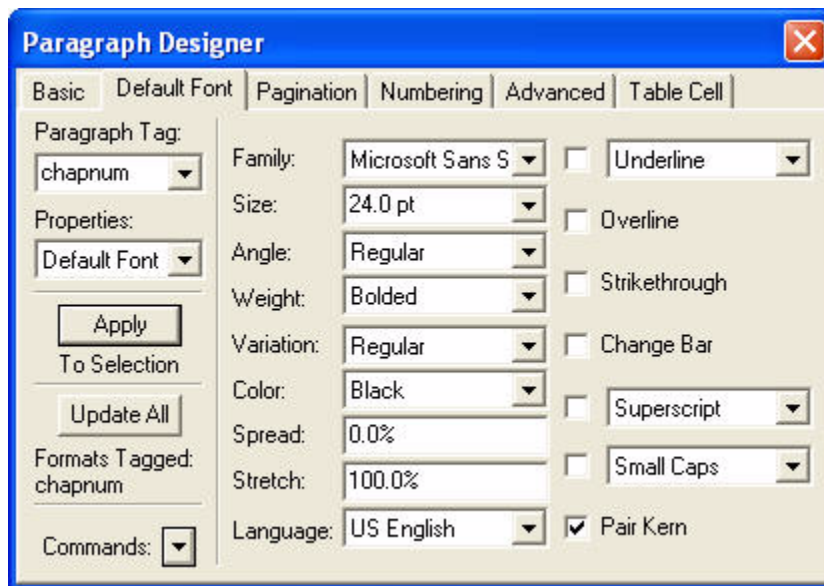
Use the Chapter Title style for the chapter title (see below for definitions)

In the Master page, the top box for the chapter number/title should be laid out as follows (see the figure below):

▶ Set the top border at ½ inch.

▶ Set the bottom border at 2 inches if the title is one line; set to 2.5 inches if the title is 2 lines long.

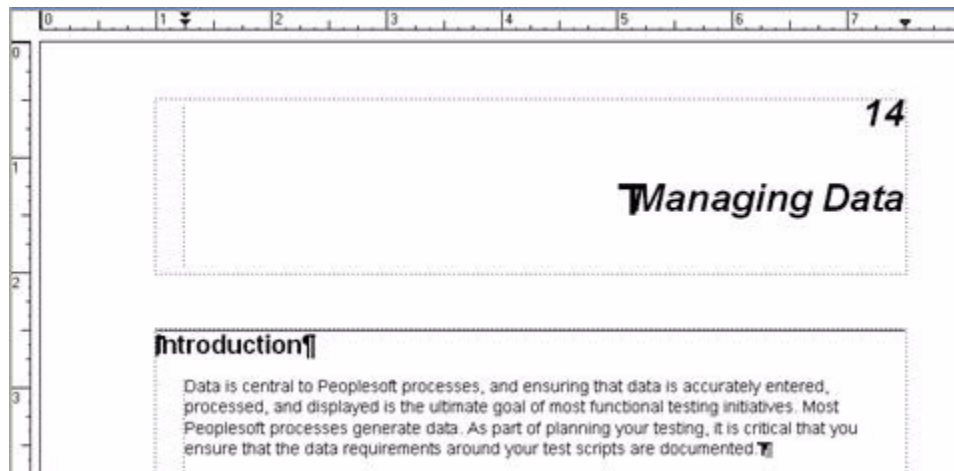▶ Set the bottom border to begin at 2.5 inches if the title is 2 lines long.

The box for the body text should be laid out as follows:

▶ Set the top border at 2.5 inches if the chapter title is one line long or set at 3 inches if the title is two lines long
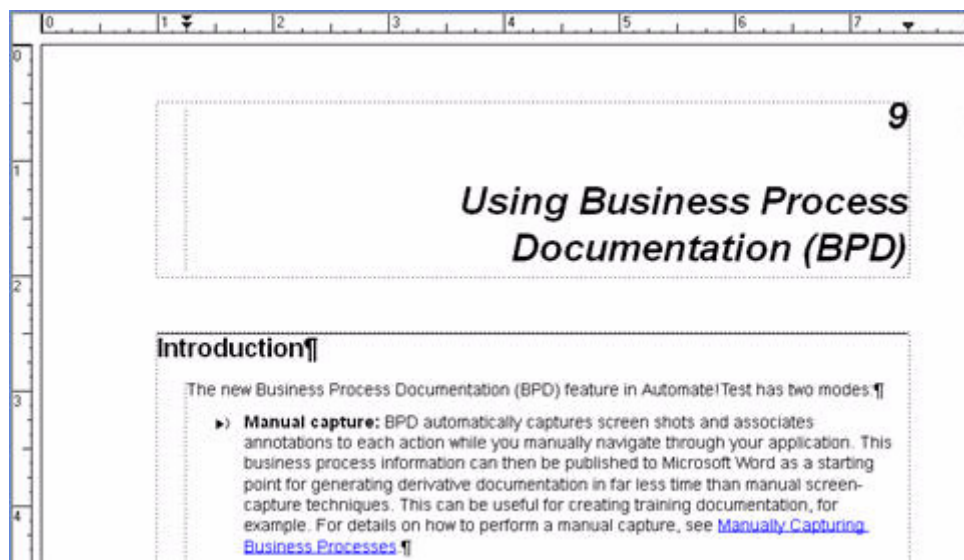
NOTE: The figure below shows the layout for a one line chapter title
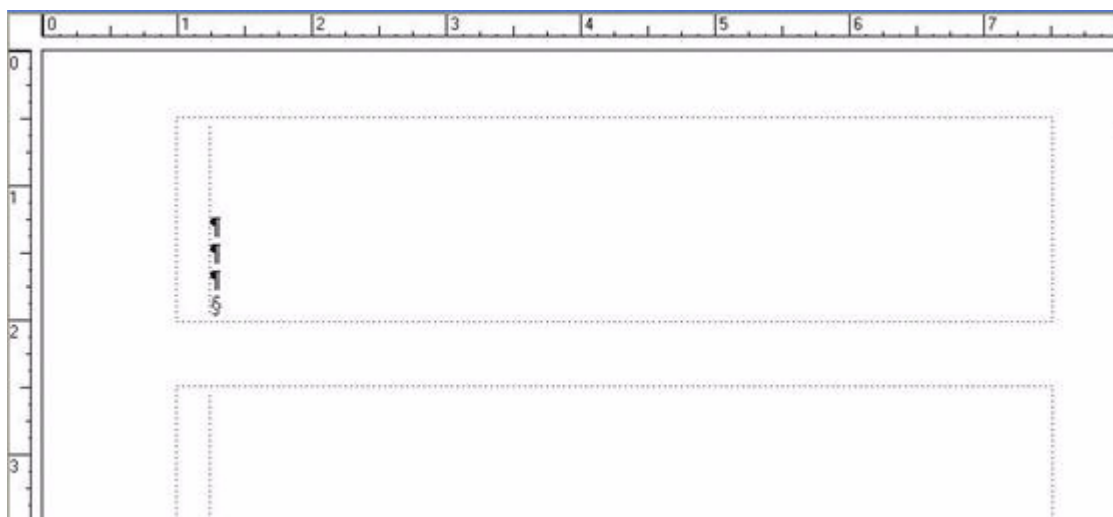
The following figure shows sample output of this layout:

The following figure shows the layout with a 2 line title:

Anchored Frames/Graphics

Use the following guidelines for anchored frames and graphics:

▶ All graphics should be inside anchored frames which are a separate paragraph with Body Text style applied.

▶ For screen captures/dialog boxes, the anchored frame should be inserted **below** the current line and centered.

▶ All graphics should be imported by reference rather than embedded in the document

▶ For showing icons within a line of text, the anchored frame should be positioned "at Insertion Point" and the distance above the baseline should be -4.286 pts.

▶ For a screen shot with callouts, group the graphic items together by selecting the anchored frame, then Edit > Select All in Frame then select Graphics > Group.
Note: Need to add recommended font/size for callouts and maybe arrow styles

▶ When creating a callout for a screen shot, the callout text must be inside a text frame. In the Framemaker graphics tools palette, use the **Place a Text Frame** tool (the icon

on the left) to insert the text instead of the **Draw a Text Line** tool. .
If the callout is not in a text frame, if the graphic is included in the online help, for some reason Webworks doesn't show the callouts. It's an unexplained weirdness.

▶ In most cases, screen captures are for print only and should be tagged as such using the conditional text feature (highlight the paragraph containing the anchored frame, then select Special > Conditional Text, then apply the appropriate conditional text tag).

Graphics File Naming Conventions

▶ If you create a screen capture that you will want to reuse for different purposes, save the original screen capture and use the prefix "master" in the file name. Then when you want to highlight different areas of the captured graphic, copy the master file, do the edits, and save it with a new file (without "master" in the name).

▶ The file names of graphics should describe the picture's contents. Do NOT name a graphic file "Figure #" in an attempt to associate it with a figure number in a chapter/book because as soon as a new figure needs to be added, the figure titles and figure numbers will be out of sequence. The file name should include words that would be in a figure caption.

NOTE: Most documents do not (and in most cases **should not**) use figure captions.

Using SnagIt

Use SnagIt to take screen shots and save the file as jpeg.

When you want to discuss a specific area of the captured graphic, instead of creating callouts using Framemaker, consider using the Spotlight & Magnify feature of SnagIt. You can use this feature several ways:

▶ Select an area to hightlight (such as an icon on the toolbar) and dim the background of the items around the chosen icon - to make it more visible.

▶ Select an area to hightlight, and magnify the item to make it more visible (and dim the background too for more effect, if desired)

SnagIt has other features for adding callouts or highlighting an area, but the two ideas above would have many uses in a procedure.

The following figure shows an icon in a toolbar that has been highlighted and the background dimmed.
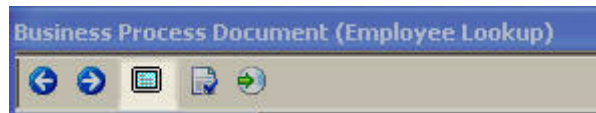
The following figure shows an icon in a toolbar that has been highlighted, the icon has been magnified, and the background has been dimmed.

The key in the 2nd technique is to make sure that the user can still see enough of the surrounding area so they can stay oriented. This can be much more effective than adding lots of callouts to a screen shot.

Once you edit a graphic to alter it as above, then save the file, you have limited ability to use SnagIt to edit the altered graphic again. For example, you won't be able to unmagnify the icon in the above figure, but you could dim the background more.

Recommendations

If you create a screen capture that you will want to reuse for different purposes, save the original screen capture and use the prefix "master" in the file name. Then when you want to highlight different areas of the captured graphic, copy the master file, do the edits, and save it with a new file (without "master" in the name). So for the two examples above, the master file might be **master-bpd_toolbar.jpg**, the first altered file might be called full-screen.jpg (since it highlights the **full screen mode** icon), and the 2nd altered file might be called publish-document.jpg since it highlights the icon for publishing a document.

SnagIt Procedures

To create the captures shown above:

1. Copy the original screen capture file.
2. Open the copied file using SnagIt by selecting File > Open.
3. Browse to the file then select it.
4. In the Tasks window, click **Spotlight and Magnif**y.
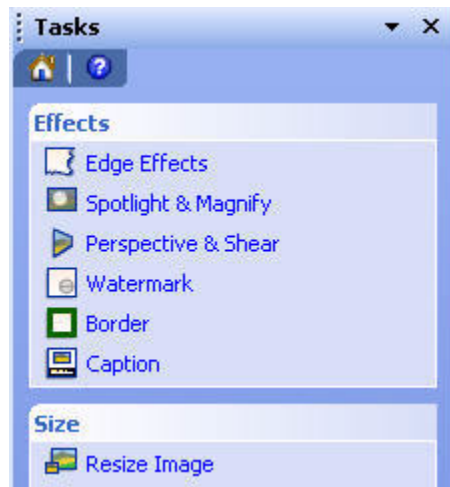
5. Select the area of the graphic you want to highlight.

6. Click **Continue to Spotlight and Magnify**.

   The Effects task window displays.

7. Select the desired effect. For example, dim the background of the surrounding area to focus on the desired area (25% dim effect seems good, but make sure the background items can still be seen well enough to provide orientation.

Another choice would be to magnify the selection to make it easier to see. You could do both. The same caution applies to both techniques.

NOTE: Before you save the file, you can use Edit > Undo multiple times in SnagIt to undo a series of changes you made to a file.

8. Save the file, using a name that gives a clue about the files contents.
Remember, once you save the file, you have limited ability to edit the file.

Using the Template

The following shows the paragraph styles in the template and explains when to use them.
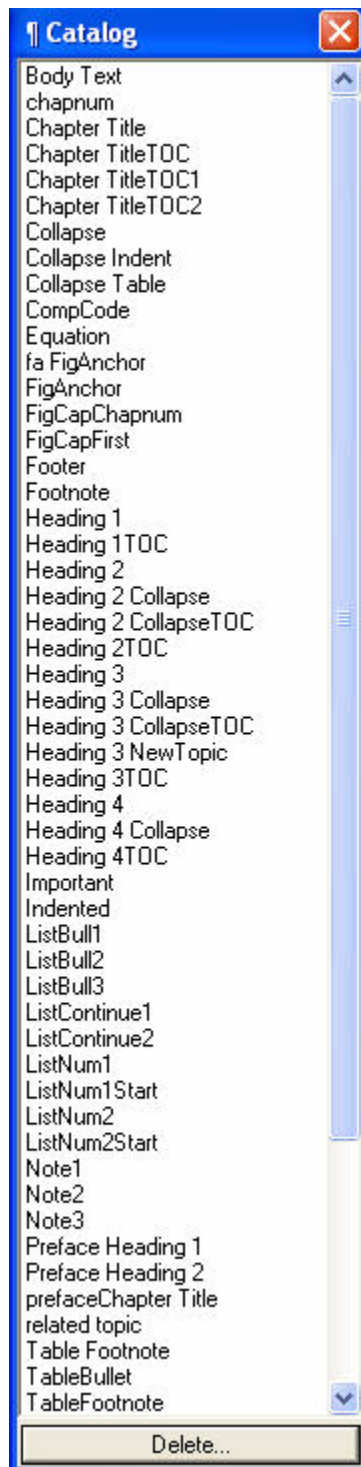
Body Text

chapnum

Chapter Title

Chapter TitleTOC

Chapter TitleTOC1

Chapter TitleTOC2

```
CompCode
```

$$Equation \qquad \text{(EQ 1)}$$

Figure 1.   FigCapFirst

Footer

Footnote

Heading 1

Heading 1TOC

Heading 2

Heading 2 Collapse

Heading 2 CollapseTOC

Heading 2TOC

Heading 3

Heading 3 Collapse

Heading 3 CollapseTOC

Heading 3TOC

Heading 4

Heading 4 Collapse

Heading 4TOC

IMPORTANT: Important

- ▶ ListBull1
    - ▷ ListBull2
    ListContinue1
        ListContinue2

1. ListNum1Start
2. ListNum1
    a. ListNum2Start
    b. ListNum2

NOTE: Note1

NOTE: Note2

NOTE: Note3

Preface Heading 1

Preface Heading 2

2. PrefaceChapter Title

▶ TableBullet
    TableFootnote

TableHead

TableListContinue
1. TableNumberStart
2. TableNumber
TableText

Table 1: TableTitle

Title

TOC Heading

Style	When Applied
Body Text	Use for all regular body text
chapnum	Use for the chapter number near the top of the first page of a chapter
Chapter Title	Use for the Chapter Title, just below the chapter number
CompCode	Used for showing monospace font text
Heading 1	
Heading 2	
Heading 3	
Heading 4	
Heading 4 Collapse	
Important	Use to indicate a caution or warning
ListBull1	Used for entries in a bulleted list excpet for the first and last bullet item
ListBull2	Used for 2nd level bullet items, excpet for the last item in the list
ListContinue1	Used for a paragraph directly below a ListBull1 list item or level 1 numbered step.
ListContinue2	Used for a paragraph directly below a ListBull2 list item or ListNum2 item
ListNum1Start	Used for the first item in a numbered list. Sets the number to 1.
ListNum1	Used for a numbered list item - other than the first or last item
ListNum2Start	Used for the first item in an alpha numbered list. Sets the number to **a**.
ListNum2	Used for an alpha numbered list item - other than the first or last item. WIll be numbered b. , c., etc
Note1	Used for a first level note (at same level as body text)

Style	When Applied
Note2	Used for note within a numbered list or other indented list
Note3	

Online Help

Before creating an online help project, find out the file name and output type that is expected for the final help file. Webworks doesn't allow you to change the project name. The name you give to the project = the name that appears in the top of the help file.

Once you generate the help file, make sure the output name matches the expected deliverable file name. For example, the expected compiled help file for Automate!Test is A!T_Help.chm.

Framemaker Preparation - General Hints

Keep the following in mind when working with Framemaker:

▶ When you do a search/replace, replacements don't happen to hidden text unless you sepcify Update All

▶ Text in text frames can be conditional but text within a text line can't be conditional

▶ Change the view of the document to include only the version you want to print, pdf, or convert to help and turn off unwanted condition indicators.

▶ Spell check the document. This will catch double spaces and punctuation problems caused by incorrectly tagged conditional text

NOTE: Page 404 in the Framemaker manual has lots of hints for doc preparation

Framemaker Preparation for Online Help

When creating an online help project, do the following in FrameMaker:

▶ Edit the Framemaker files and identify print only and online only text, apply the context tags to the content. Typically, screen shots of dialog boxes are not included in help files. The lead-in text for the figure and any figure caption should also be designated print only.
Print only text should be blue.
Online only should be green.

NOTE: If at the beginning of a section, you created cross-reference list of links to topics within the section that you want to show in the pdf file, designate the list as print only since Webworks will automatically generate and display links after each heading level (if you follow the set up instructions in Webworks Tasks).

▶ When creating a Framemaker book file for the online help, do the following:

▷ Save the online book file in the same directory as the book that is to be printed. Be sure to use the word "online" within the online book file name

▷ Edit the online book file and remove the file containing the front matter, TOC, and index

NOTE: The online help book file will be pointing to the Framemaker source files. Whenever you update the source files, you simply regenerate the help files in Webworks and the changes to the Framemaker source files are incorporated into the help file.

▶ Follow each chapter title and Heading 1 for which there are subheadings with an introductory sentence or paragraph.

▶ Don't stack headings next to each other. Follow each heading paragraph with body-text content.

▶ Determine places in the document where portions of text are for differnent levels of expertise and would lend themselves to possibly being collapsible. See the next section for more information.

▶ When you make changes to a Framemaker source file then open Webworks, the changes to the source file are NOT automatically read by Webworks. The ensure that the updates are read by the Webworks project, you have to tell Webworks to read the changes by using the Project menu (select either Scan Selected Document or Scan all Documents) See page 53 in the Webworks manual.

Collapsing Text

Webworks allows you to designate text that is collapsible/expandable in the online help via an arrow control. You can specify that the text is either shown or collapsed when the help is first opened.

The Heading 2 Collapse, Heading 3 Collapse, and Heading 4 Collapse styles in our Framemaker template can be used to designate entire sections where you want the user to be able to expand or collapse the text within that section.

The Collapse, Collapse Indent, and Collapse Table styles can be used to identify the starting point for collapsible text. Collapse = Body Text, Collapse Indent = indented list items, and Collapse Table should be used to collapse text within a table cell (for example, a note within a table cell).

This can be useful for several situations:

▶ There is a lot of explanatory text that only pertains to a beginning level user. The user wouldn't want to see the text once they're more advanced. You can set it up in the Framemaker source file so the beginning level text will be hidden by default (in the help) but will always be seen in the User Guide, or other pdf files. You can designate that an entire section be collapsed using the Heading # Collapse styles, or use the Collapse, Collapse Indent, and Collapse Table styles to specify a more discrete portion of content to expand/collapse.

▶ A procedure contains lots of high level steps (step 1, 2, 3, etc) and more detailed level substeps (a, b, c, etc). An experienced user would only be interested in the numbered level steps, so the substeps could be collapsed.

►   A complicated table contains lots of notes or other information that would lend itself to be seen occasionally. Some of the table text could be collapsed.

Specifying Text for Collapsing

To specify text for collapsing/expanding in the online help:

NOTE: Page 174 in the Webworks for Frameker guide explains this process generically.

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1. Determine the starting point of the section to be collapsed (the text that will become the link to expand the text).
2. Apply the appropriate style to the paragraph (Heading # Collapse, Collapse, Collapse Indent, or Collapse Table).
   This tells Webworks where the starting point of the text to be collapsed occurs.
3. Identify the text that will become the drop-down content.
4. Put the cursor at the end of the content you identified in step 4.
5. Create a new marker called DropDownEnd.
   a. Select Special / Marker from the menu bar.
      The Marker dialog box displays.
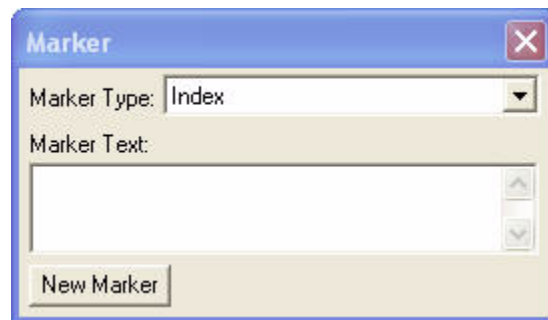
   b. From the Marker Type drop-down list, select Edit.
      The Edit Customer Marker Type dialog box displays.
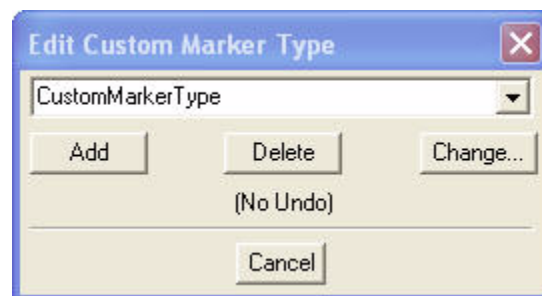
   c. Type the new marker name "DropDownEnd" and click Add, then click Done.
      The Edit Customer Marker Type dialog box closes.
6. Apply the new marker to the end point of the drop-down text section.

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7. Repeat these steps for all text that you want to be a drop-down area.

   Now you're ready to do the Webworks part of the process. See [Webworks Tasks](#) for more information.

Webworks Tasks

When creating a Webworks project, do the following:

1. Before creating an online help project, find out the file name and output type that is expected for the final help file.

2. Specify the project file name that will appear in the help file. When you create the project, the project name = the name that appears in the title bar of the online help. The title can't be edited.

   ▷ The project name ought to be: "<product name> Online Help

   ▷ Do not include rev numbers in the project name.

   ▷ Also be sure to use the correct output type.

   NOTE: The output type can be changed later using Project > Manage Format Targets.

3. Use the correct template file for the project. For a chm output, use the template at S:\Engineering\Product Documentation\WebWorks\Template\A!Test template.wsp

4. Define how the conditional text should appear. Select Format > Condition to display the Conditions and Variables dialog. Then specify which conditions to make visible. For example, the Framemaker source files ought to tag most screen captures/dialog boxes as print only - since most aren't needed in online help. Be sure that the print only condition is not visible.

   NOTE: The list of available conditions is taken directly from the conditions you defined in the Framemaker source file.
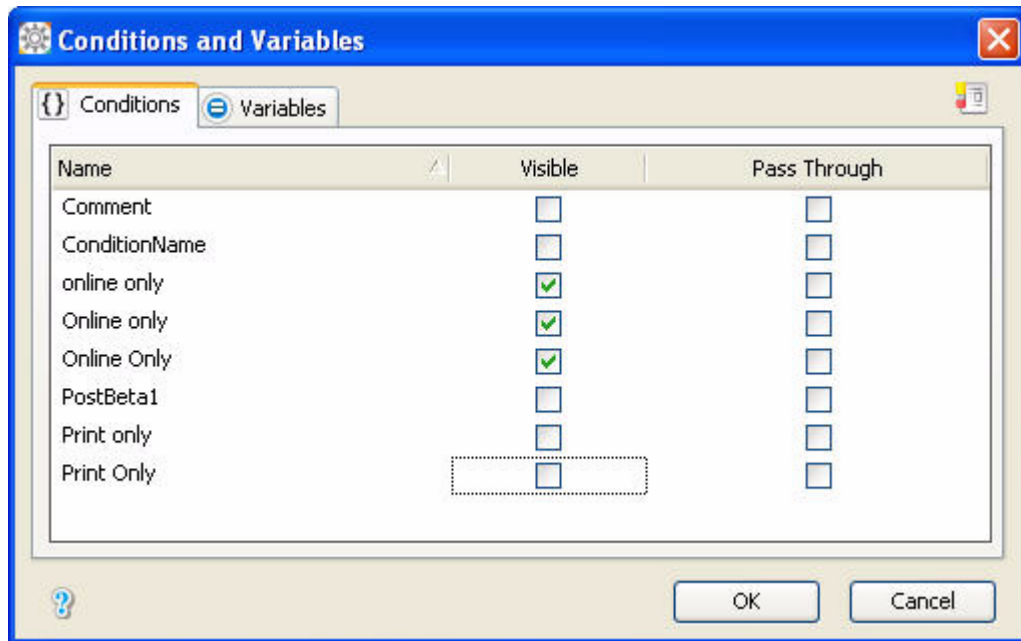
5. Tell Webworks how you want to map the heading styles for the table of contents generation and how you want the TOC for the help to appear. Use the following specifications:

   a. Select View > Style Designer, then click the Paragraph Styles tab.

   b. Click the Options tab.

      The Style Designer Paragraph Options window displays:
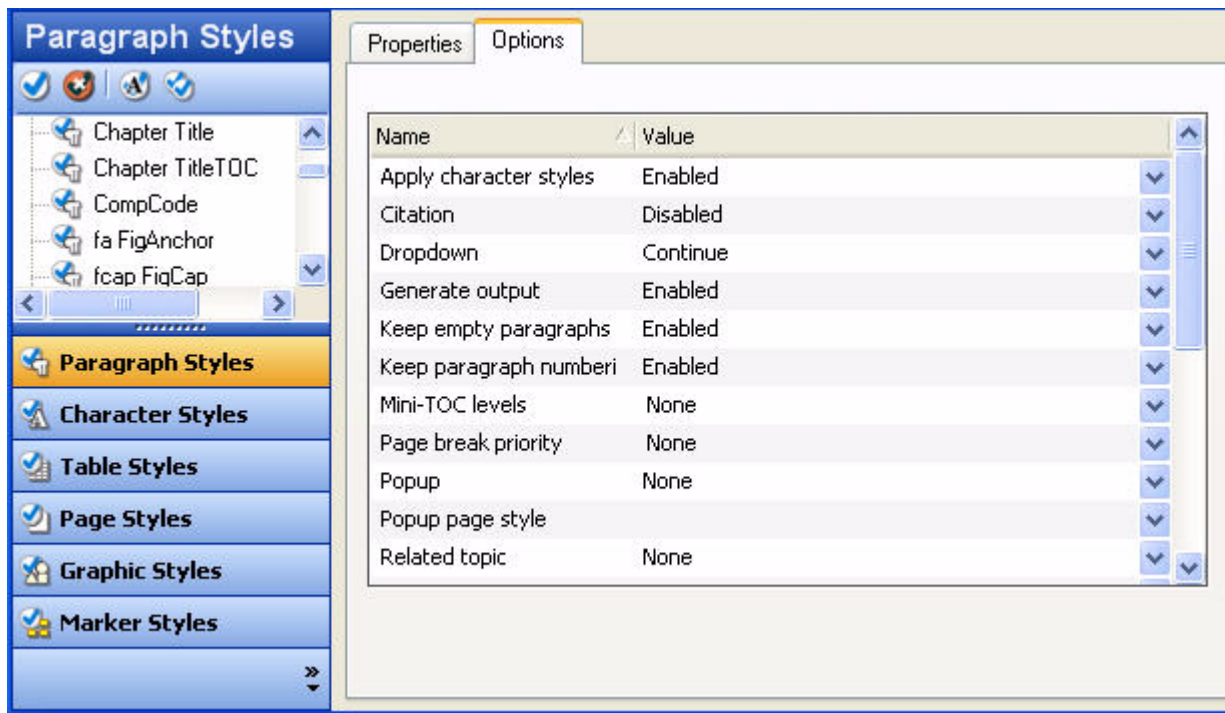
c. In the Paragraph Styles list, scroll down to and select the chapnum tag. Make sure that Generate Output is disabled.

d. In the Paragraph Styles list, scroll down to and select the Chapter Title tag. Make sure that Generate Output is enabled, page break priority = 1, and Table of Contents Level is 1.
Also set Mini-TOC levels to 1. This will automatically generate a list of links to heading 1 topics from the chapter title page, as shown below.
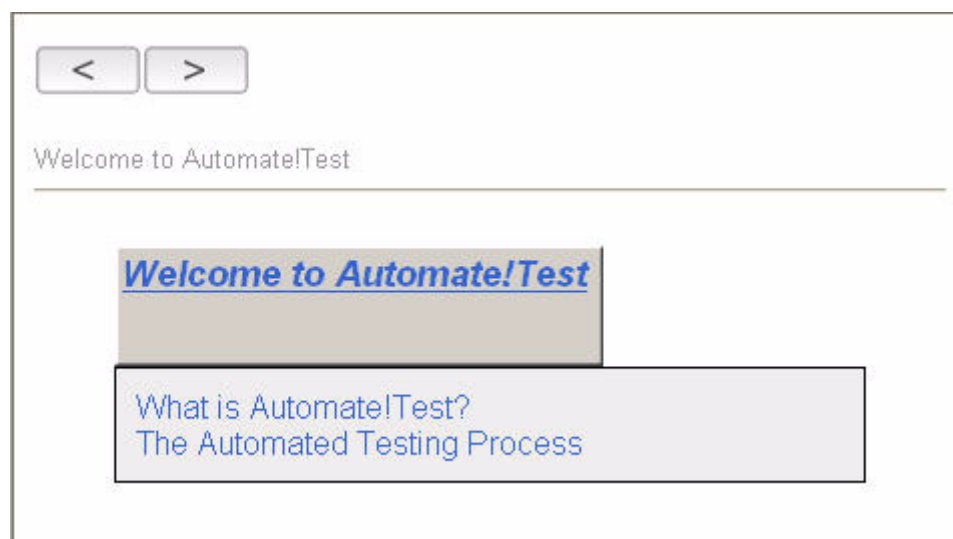
e. Then select Heading level 1 tag and set the page break priority to 1 and Table of Contents Level to 2.
Also set Mini-TOC level to ALL. This will automatically generate a list of links to heading 2 and 3 topics from the heading level 1 topic, as shown below. The links will appear before any text in the heading 1 topic.

f. Select Heading level 2 tag and set the page break priority to 1 and Table of Contents Level to 3. Set mini-TOC level to 3.

g. Select Heading level 3 tag and set the page break priority to 2 and Table of Contents Level to 4. Set mini-TOC level to None.

6. Tell Webworks about any collapse tags you used so it knows what to do with the collapse tags.

a. In the Style Designer Paragraph Options window, select the name of the first collapse tag used in your book.
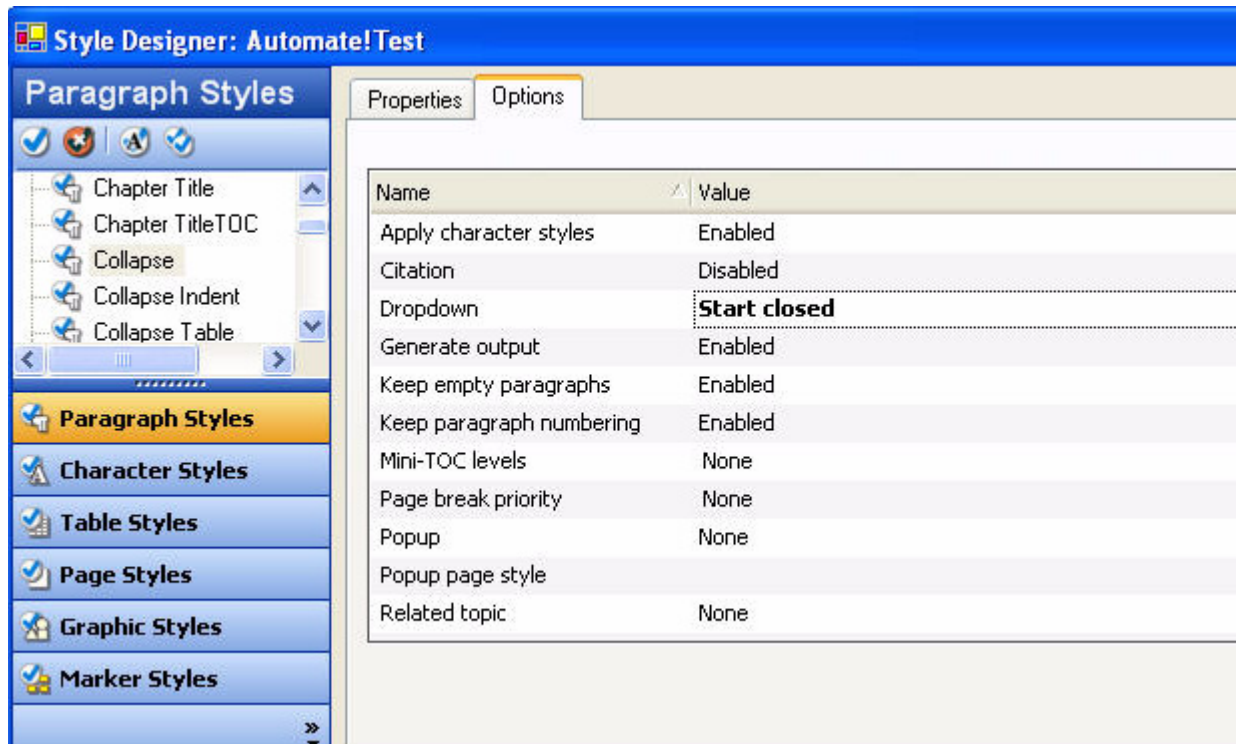
b. From the Dropdown option, select how you want the text to appear when online help first opens: Start Open, or Start Closed. Typically, Start Closed is used.

c. Repeat these steps for each collapse style used in your book.

NOTE: When the project is compiled, in the online help, the link paragraph for the collapsed text will have an arrow ▶ at the end of it. Clicking the arrow will expand the text. Clicking the collapse icon will collapse the text.

7. Change the headings to align left.

a. With Paragraph Styles selected, click the Properties tab.

b. Click the Text property.

The Text properties page displays as shown below.
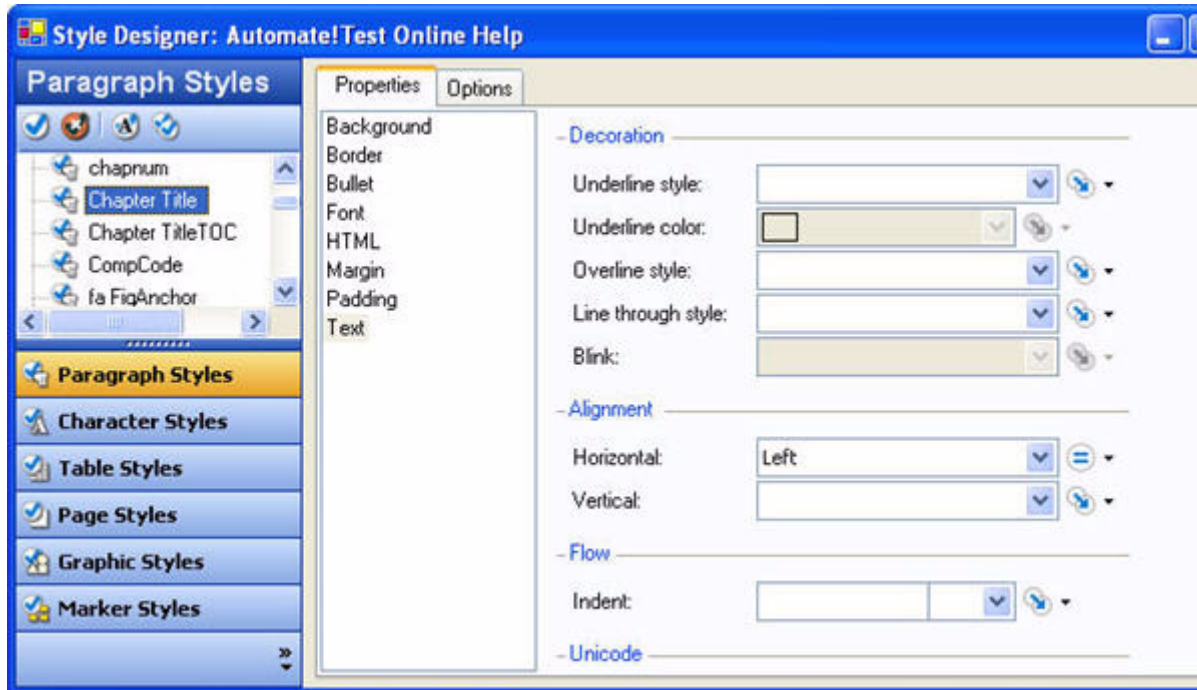
    c.   From the Paragraph Styles list, select Chapter Title.

    d.   In the Properties page, under Alignment, select Left from the Horizontal drop-down list.

    e.   From the Paragraph Styles list, select Heading 1.

    f.   In the Properties page, under Alignment, select Left from the Horizontal drop-down list.

    g.   Repeat the process for Heading 2 and Heading 3.

8.   Define the Page options by selecting View > Style Designer, then click the Page Styles tab, then the Options tab.

     The Style Designer Page Options window displays:
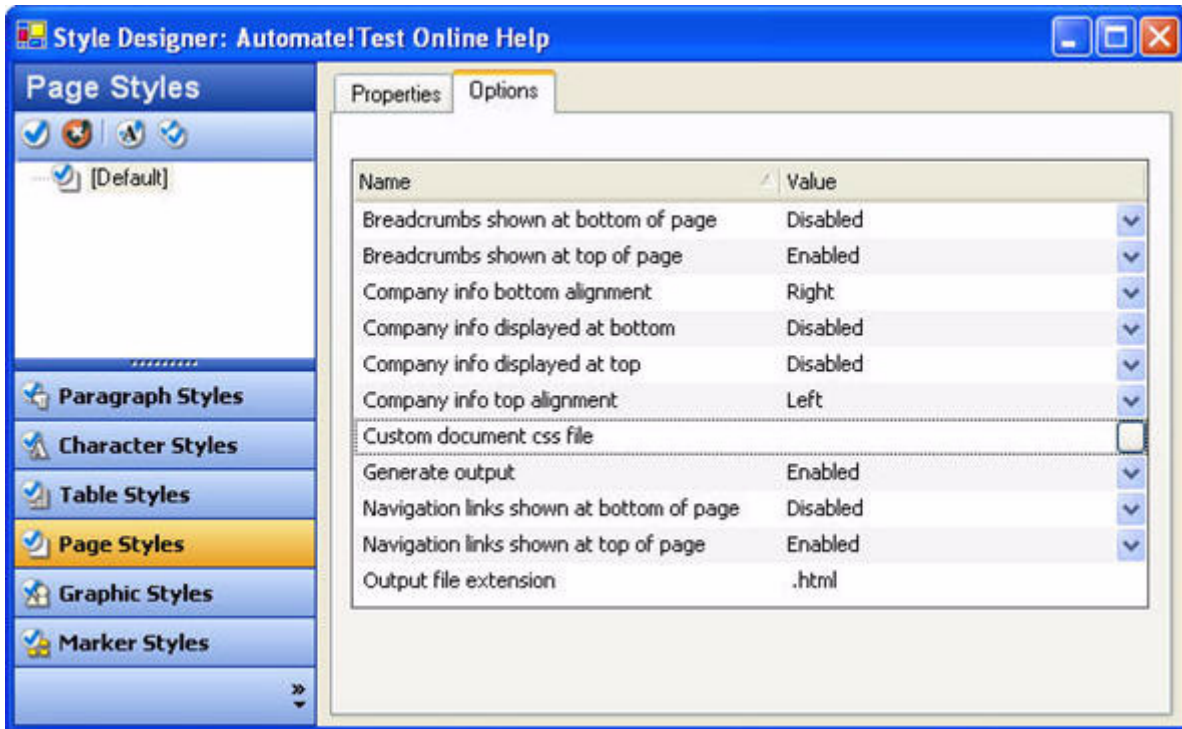
Then do the following:

a. Do not include the company information in the generated topic. To ensure this, make sure that Company info displayed at top and Company info displayed at bottom is disabled.

b. Specify that the navigation links show at the top **and** bottom of the page. Make sure these items are enabled.

c. Define how the breadcrumbs will appear in the help.

▷ Specify that the breadcrumbs (topic path) be shown at the top and bottom of the topic. To define this, make sure that **Breadcrumbs show at top of page** and **Breadcrumbs show at bottom of page** is enabled. Make sure that Breadcrumbs show at bottom of page is disabled.

d. Define the separator that will appear between the entries in the bread crumb trail. To do this, click the Properties tab. Click Navigation. In the Breadcrumbs section, use the drop-down list to select > as the Separator. See the figure below.
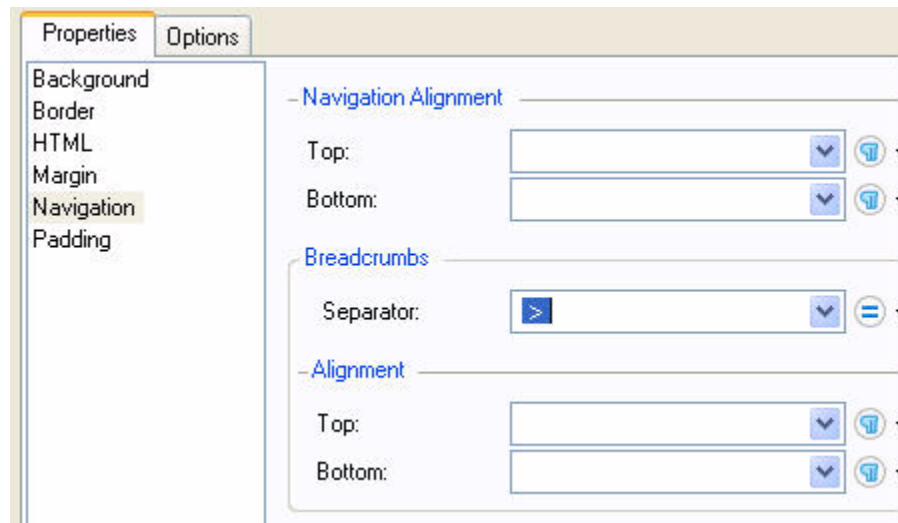
9. Save the project.

10. Generate the help.

11. Once you generate the help file, make sure the output name matches the expected deliverable file name. For example, the expected compiled help file for Automate!Test is A!T_Help.chm. You will have to rename the compiled help because the project name (therefore the default output name) will not match.

12. ADD INFO ABOUT WHERE TO STORE THE FILES. SUGGEST DIRECTORY STRUCTURE

Preparing Documents for PDF

When preparing documents for conversion to pdf, keep the following in mind:

▶ Make sure that comments or other items not meant to be in a print version are hidden.

▶ Edit the TOC and Index files and make sure the line breaks are in a good place and no extraneous text is included.

▶

Archiving Release Files

When a release is ready, copy the final pdf files to the \\S: \newmerix\Engineering\Product Documentation\Latest PDFs folder so whenever anyone needs a copy of the released file, they can get it themselves.

Also, copy all the source files to the appropriate product folder in .\S: \newmerix\Engineering\Product Documentation\