

Book Type
Book Title

Unit 1
Unit 2
Unit 3

Item Number
Product
Date

Copyright Info

Company Name

Company Address

City, State ZIP

Phone

Fax

<http://www.company web site>

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About This Guide

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This guide covers the features of

Other Documentation

- For an overview of new features and software updates, see the *Release Bulletin*.
- For software installation instructions, refer to the appropriate installation guide for your system.
- For conversion information, refer to the *Conversion Guide*.
- For an overview of system features and instructions on navigating the user interface, see *User Guide: User Interfaces*.
- For detailed information on using system features, refer to the relevant user guide.
- For technical details, refer to *Entity Diagrams* and *Database Definitions*.
- To view documents online in PDF format, see the *Documents on CD* and *Supplemental Documents on CD*.

Note Installation guides are not included on a CD. Printed copies are packaged with your software. Electronic copies of the latest versions are available on the Web site.

For a complete list of documentation, visit the Support site.

Online Help

There is an extensive online help system. Help is available for most fields found on a screen. Procedure help is available for most programs that update the database. Most inquiries, reports, and browses do not have procedure help.

For information on using the help system in the different environments, refer to *User Guide: User Interfaces*.

Web Site

The company Web site provides a wide variety of information about the company and its products. You can access the Web site at:

<http://www.company.com>

For users with a Web account, product documentation is available for viewing or downloading on the Support site:

<http://support.company.com/>

You can register for a Web account by accessing the Web site and clicking the Accounts link at the top of the screen. Your customer ID number is required. Access to certain areas is dependent on the type of agreement you have with the company.

Most user documentation is available in two formats:

- Portable document format (PDF) files can be downloaded from the Web site to your computer. You can view and print them with the free Adobe Acrobat Reader.
- HTML files let you view user documentation through your Web browser and use search tools for easily locating topics of interest.

Features of the Support also include an online searchable solution database to help answer questions about setting up and using company products. Additionally, the site has information about training classes and other services that can help you learn about company products.

Conventions

Screen Illustrations

System functions are available in a feature-rich .NET-based graphical user interface (UI); a subset of functions can be used in a simplified character interface. All screenshots in the documentation show the .NET UI.

Navigation in the two UIs is not the same. The user guide text follows the navigation model of the .NET UI for moving from one screen to the next. In the character interface, the Progress status line at the bottom of a

program window lists the main UI-specific keyboard commands used in that program. In the .NET UI, alternate commands are listed in the Actions menu.

For complete keyboard command summaries for UI navigation, refer to the appropriate chapters of *User Guide: User Interfaces*.

Typographic

This document uses the text or typographic conventions listed in the following table.

If you see:	It means:
monospaced text	A command or file name.
<i>italicized</i> monospaced text	A variable name for a value you enter as part of an operating system command; for example, <i>YourCDROMDir</i> .
indented command line	A long command that you enter as one line, although it appears in the text as two lines.
Note	Alerts the reader to exceptions or special conditions.
Important	Alerts the reader to critical information.
Warning	Used in situations where you can overwrite or corrupt data, unless you follow the instructions.

Using FrameMaker Templates

This chapter provides information about the standard template used to develop product information in FrameMaker. This chapter discusses the following topics:

<i>Why Styles?</i>	6
<i>Paragraph and Character Tags {Ihead}</i>	10
<i>Tables</i>	28
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Why Styles?

Creating product information has two major aspects. The first is developing content that is complete, accurate, and understandable. The second is presenting this information in a consistent, well-designed manner that facilitates the reader's understanding.

This chapter addresses the second aspect of developing product information. Consistency in the presentation of information across platforms is enforced through the use of document templates. A document template, also known as a style sheet, defines the appearance of each logical unit in a document. Consistent use of styles:

- Ensures that documents with diverse authors have a common look and feel.
- Provides a foundation supporting more complex book management features such as tables of contents, cross-references, and indexes.
- Enables global changes to be made quickly with minimal effort.
- Supports a document life cycle that spans multiple environments, enabling a document to move from Microsoft Word to FrameMaker to the Web with minimal reformatting.

Use of styles is especially critical in an environment where information is moved between different tools. In our case, while some of our product information is developed in Word, it is produced in FrameMaker, which has more advanced book management features. To facilitate the conversion from Word to Frame, the style names used in the MS Word `tmplt87.dot` are the same as those used in the equivalent template in FrameMaker. Without styles, all formatting in Word documents is lost.

The normal extension for a document created in Word is `.doc`. Templates, on the other hand, are distinguished by an extension of `.dot`. In FrameMaker, an extension is not used to distinguish between documents and templates; both have a `.fm` extension.

Important All document formatting must be done with the defined set of styles contained in this template. Format overrides should never be used.

Ignoring this rule can greatly increase the amount of time required to move a document from development to publication. It creates even more problems with the conversion to HTML. These are discussed in “HTML Considerations” on page 54.

The Word template contains a section on conversion tips with recommendations for making the conversion from Word to Frame as painless as possible.

Note Microsoft uses the term *style* to refer to attributes associated with text or paragraphs. FrameMaker uses the term *tag* to refer to the same attributes. The FrameMaker term is used in the rest of this chapter.

Adding New Template Elements

Occasionally, you may find that existing tags or other elements in the standard user-guide templates do not meet your current needs.

Example You require a character tag that combines bold, italicized, and monofont formatting and none exists in the template.

If you feel that a new element is needed in a standard template or in your document only, fill out the Template Change Request Form with the details of the required change and submit the form to the lead technical editor for review. This ensures that all changes to and deviations from standard templates are made visible early in the document life cycle and do not become issues later during production.

Important Do not apply formatting overrides or add new elements to a document without following the proper change-request procedure. Doing this can cause problems later when documents are converted to HTML or PDF format.

Updating Books with Template Changes

The FrameMaker templates develop and change as we encounter new kinds of information and as we find better ways of completing tasks. Whenever you begin working on a book, you should make sure that the book is using the latest version of the template.

Some template changes require a number of steps to convert an existing document to the new template design. When this happens, we generally try to convert all documents at once to ensure that the correct steps are followed.

Most of the time, you can simply import formats from the templates into your book files to get the latest changes and additions. However, make sure to import from a template that corresponds to the appropriate part of the book. For example, to update your table of contents, import formats from the table of contents template, not from the chapter template.

Note Some template elements, such as paragraph and character tags, can be imported across an entire book. But even this varies by type of book. For example, you can import variables across an entire user guide, but not across the Database Definitions book files. See “Template Exceptions” on page 47 for details about how templates vary.

To see what kind of changes have been made in the template, review the Template Change Request Forms in:

```
\directory
```

Important If you must update a book that has not been updated recently and has an out-of-date set of tags, consult with the lead technical editor regarding required template changes.

You should periodically review template elements to ensure the integrity of a document. This is especially important before turning over a document for review. Use the Structure Checklist: Document to review these elements.

Updating Formats

To update the formats in a document:

- 1 Open the template files you want to import from.
- 2 Open the book file you want to import to.
- 3 From the target book file, choose File|Import|Formats.
- 4 Choose the template file as the document to import from.
- 5 Choose the formats you want to import.

- 6 If you are making minor changes, do not remove manual page breaks. However, if you are planning to make significant content changes, removing and reapplying them at the end of the edit cycle is often easiest.
- 7 Since format overrides in general are not a good idea, you can remove other format/layout overrides.

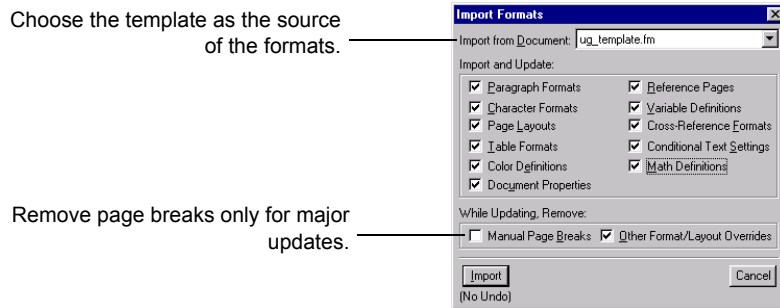


Fig. 1.1
Import Formats

Important Always be careful when selecting Page Layouts as an import format. If you have any special master page layout, it will be lost.

Deleting Formats

You may need to delete extraneous paragraph tags introduced during development. You may also want to delete tags that you do not use to simplify document maintenance. To delete paragraph tags:

- 1 Choose Format|Paragraph|Catalog to open the paragraph catalog or Format|Character|Catalog to open the character catalog.
- 2 In the Catalog window, click Delete.
- 3 In the Delete Formats window, select each tag you want to delete and click Delete.
- 4 When you have finished deleting tags from the catalog, click Done.

Paragraph and Character Tags {1head}

This section includes an overview of the tags provided in the user guide chapter template and the purpose of each. Table 1.16 on page 48 summarizes this information. You may find it useful to keep the table in front of you while you work until you become familiar with the tags.

Note To make it easy for you to recognize tag names in the following discussion, each is presented in bold between braces. The braces are not part of the actual name.

The discussion in this chapter focuses on the development of user guides. Other types of books may require different tag sets or additional formatting considerations. Similar tags are used as much as possible, but if you are working on a document other than a standard user guide, check for instructions unique to that kind of document.

Note Database Definitions is described in the *Production Handbook*.

Subordinating Tags {2head}

Subordinating tags are used to organize information from the most general to the most specific. These tags include **{unit}**, **{1head}**, **{2head}**, **{3head}**, and **{4head}**. **{unit}** normally represents a chapter or major section, while **{1head}** represents a broad topic. Beneath the topic, **{2head}**, **{3head}**, and **{4head}** represent increasingly focused subtopics.

The tag for paragraph content is **{body}**.

You can subordinate text under body by using **{bodysub1}**.

Further subordination is provided with **{bodysub2}**.

In addition to **{bodysub1}** and **{bodysub2}**, three other subordinate paragraph tags, **{examplesub}**, **{notesub}**, and **{importantsub}**, are provided. Use these tags to subordinate text with an autonumbered heading under bulleted, autonumbered, or **{bodysub1}** text. These tags are identical to their corresponding first-level autonumbered tags except that they are indented.

Note For information on autonumbered tags, see “Special-Purpose Paragraph Tags” on page 15.

Lists

Bulleted and numbered lists are common ways of organizing and presenting information.

Bulleted Lists {3head}

A bulleted list should have more than one bullet. If a bulleted list begins to grow complex and contains a lot of subordinate text, it has probably outgrown the list format. Consider restructuring into subheadings.

Creating Bulleted Lists {4head}

Create bulleted lists with the **{list}** tag. Use **{listsub}** to create a subordinate list within a list. Use subordinate text tags such as **{bodysub1}** if a bullet point requires more than one or two lines of explanation.

- This is text in **{list}** format. It is the first level of subordination and may be the only level.
This is text in **{bodysub1}** format.
- This is text in **{list}** format.
 - This is text in **{listsub}** format. It is the second level of list subordination.
 - This is text in **{listsub}** format.
 - This is text in **{listsub2}** format. Use this level of subordination with care. It is most frequently used in installation guides below substeps.
 - This is text in **{listsub2}** format.
- This is text in **{list}** format.

Keeping Text Together in Bulleted Lists {4head}

Use **{bodykeep}** or **{bodysub1keep}** to ensure that the text leading into a bulleted list stays with the first bullet. **{bodykeep}**

{bodysub1keep} may be needed when field descriptions have a list of choices, as in the following example:

Method. Enter the method used to allocate costs from a base process to its co-products. Possible entries:

- Receipt Quantity
- Price
- Receipt Quantity and Price

Numbered Lists

Use the **{step1}** tag for the first element in a numbered list. Use **{step}** for the remaining numbered items. These tags include autonumbering.

- 1 This text is formatted with **{step1}**. The tag includes autonumbering, which is initialized with 1. This tag is defined to keep with the preceding paragraph, so the paragraph leading into the list stays with the first number.

You can use other tags between steps. For example, use **{bodysub1}** for additional explanation between two steps.

Example This text is formatted with **{examplesub}**. Use this tag to insert an example beneath a numbered or bulleted paragraph.

- 2 This text is formatted with **{step}**. The tag includes autonumbering, which is always one more than the number that precedes it.

Note This text is formatted with **{notesub}**. Use this tag to insert a note beneath a numbered or bulleted paragraph.

- a This text is formatted with **{substep1}**.

Use **{bodysub2}** to include additional explanation between two substeps.

- b This text is formatted with **{substep}**.

Graphics, Diagrams, Screen Captures

Two sets of tags are provided for use with graphics. Which one in each set you use depends on whether you want to include or exclude graphics and captions in online HTML output.

Use **{figure}** or **{figureNoOutput}** for captions. They are defined to display in the sidebar and must precede the actual frame containing the graphic. Figure tags are autonumbered and derive the first number from the **{unitnumber}** tag.

Import figures and screen captures by reference; *never* embed them. Format the paragraph marker located above the graphic with the **{graphic}** or **{graphicNoOutput}** tag. These are used to anchor the graphic frame.

Note For graphics in table cells, use the **{graphictable}** tag rather than the **{graphic}** tag to format the paragraph containing the graphic anchor. This is illustrated in Table 1.3 on page 31. This ensures that graphics display correctly when documents are converted to HTML.

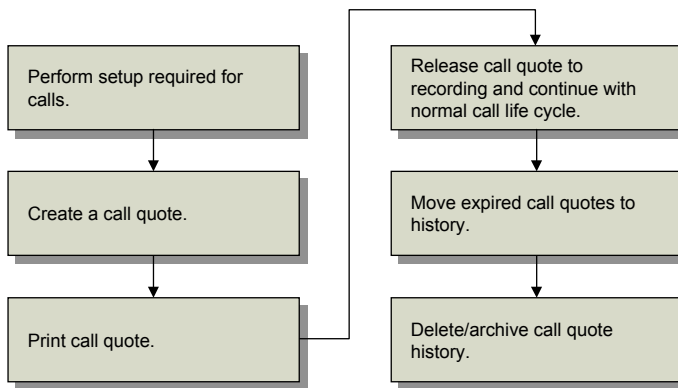


Fig. 1.2
Figure Title for
Diagrams,
Graphics, and
Screen Captures
{figure}

Anchored Frames

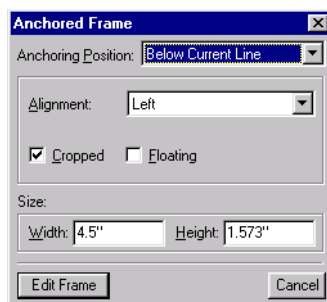
Typically, the easiest way to define the formatting for a graphic is to copy an existing one, including the caption, anchor, and anchored frame. If you create a new frame, follow these guidelines:

- The anchoring position is Below Current Line.

- Alignment is left.
- Cropped is enabled, which prevents the image from extending outside the page margin.
- Width is 4.5 inches; height varies with the graphic size.

Important Do not create anchored frames by importing a graphic, or if you do, make sure you apply the preceding formatting rules. When you import a graphic, the anchor is centered and the width is sized based on the graphic.

Fig. 1.3
Settings for
Anchored Frames



Frame format affects the display of graphics in HTML output. Graphics may look fine in a FrameMaker book, but variations in alignment affect the display of the HTML files.

Use the graphic frame to limit display to the part of a screen capture that is meaningful. For screen captures that contain only a few fields, you can crop the extraneous area to utilize space better. You can also crop the screenshot when you take it.

DPI

When you insert a screen capture, the system prompts you for a resolution. For user guides, you typically enter 185 in the Custom dpi field. If you plan to add callouts, for a screen capture of the Desktop interface, change the DPI to 200 so that you have room for the callout text.

Generally, screen captures are imported at 150 DPI in installation guides. This maximizes the readability of the screen for detailed instructions.

Graphic Callouts

Use one of three tags for formatting graphic callouts:

- Use **{callout C}** for centered callouts.
- Use **{callout L}** for left-justified callouts.
- Use **{callout R}** for right-justified callouts.

Use the FrameMaker drawing tool to add callout lines as appropriate. These should be .5 in weight. In general, use right-angle lines. Unnecessary angle variations can make graphics look nonuniform and cluttered.

Special-Purpose Paragraph Tags

Some formats are used for special purposes only. Depending on the kind of information you are writing, you may or may not need to use these tags. For example, the code tags are only used in documents that contain lengthy code samples. To avoid cluttering the paragraph and character catalogs with unnecessary tags, you can delete any template tags you do not plan to use in your document.

If you find that you need these tags later, you can reimport the template formats, making sure that Paragraph Formats is selected in the Import Formats dialog box.

Chapter Heading Lists

The first page of each chapter, or unit, in a book generally includes a short paragraph introducing the chapter contents, followed by a list of the major sections in the chapter. This is illustrated at the beginning of this chapter; see page 5.

To create this list, use the ChapterTOC cross-reference format to insert active cross-references to all **{1head}** paragraphs in the chapter. Use a new paragraph for each cross-reference and organize them in the order in which their associated headings appear in the chapter. Finally, format each paragraph in the list with the **{1headtoc}** paragraph tag, as in the following example:

Why Styles? **6 {1headtoc}**

The **{1headtoc}** tag is also used to create table of contents lists for section separator pages. Format these lists in the same way as chapter heading lists, but use the ChapterTOC cross-reference format to create cross-references to the title of each unit in the section rather than to **{1head}** paragraphs.

A similar list is created on many title pages using the **{titleTOC}** tag and inserting heading cross-references to chapter or section titles in the book.

Code Listings

You may need to use samples of code or scripts to illustrate a technical point. Programmers typically use tabs to format code so that the flow of logic is clear. However, you cannot use tabs in any document converted to HTML format, since the HTML environment does not support them. Therefore, for a code sample to display properly when converted to HTML, you must do one of the following:

- Format it using the special set of code tags to indicate levels of tab indenting.
- Place it in a text box within an anchored frame so that it is converted to HTML as a graphic rather than text.

Typically, the anchored frame method is used for short code samples when:

- You want to add one or more callouts.
- You want to have a figure title to use as a reference somewhere else in the document.
- The indentation of the sample is deeper than the levels supported with the code tags.

When formatting a code sample as a graphic, use the **{code}** tag. You can use tabs within this tag to show standard tab indents in code.

Important Do not use tabs with other tags.

To place a code sample in an anchored frame:

- 1 Choose Special|Anchored Frame.
- 2 Use the Height field in the Anchored Frame dialog to specify the appropriate frame size. Leave Width set to 4.5.


- 3 Choose Graphics|Tools.
- 4 Click the  button on the tools palette.
- 5 Position your cursor in the anchored frame and drag diagonally to create a text frame of the required size.
- 6 In the Create New Text Frame dialog box, enter 1 in the Number field (number of columns) and click Set.
- 7 Click in the text frame to place an insertion point in it and type the code text.
- 8 Apply the **{code}** paragraph tag to the text.

Figure 1.4 presents a code segment using a text box within an anchored frame. It is anchored like other graphics in a paragraph with the **{graphic}** tag.

```
ListPtr = POINTER TO ListNode
ListNode =
  RECORD
    key: CARDINAL
    Data: ...
    next: ListPtr
  END
```

Fig. 1.4
Code Listing
{figure}

For code samples that are too large to fit in a single text frame, use the paragraph tags listed in Table 1.1 to create multiple levels of indentation without using tabs.

Tag Name	Description
codesp	no indent, space above
code	no indent, no space
codein1	1/4 inch indent, no space
codein1sp	1/4 inch indent, space above
codein2	1/2 inch indent, no space
codein2sp	1/2 inch indent, space above
codein3	3/4 inch indent, no space
codein3sp	3/4 inch indent, space above
codein4	1 inch indent, no space
codein4sp	1 inch indent, space above

Table 1.1
Code Tags

Tag Name	Description
codein5	1 1/4 inch indent, no space
codein5sp	1 1/4 inch indent, space above
codein6	1 1/2 inch indent, no space
codein6sp	1 1/1 inch indent, space above

The following example illustrates the use of these formats in a code sample:

```
# start server {codesp}
$DLC/bin/_mprosrv $DBNAME -H HPCPD -n 24 {code}

$DLC/bin/_progres \ {codesp}
  $DBNAME -ld db \kfkfdkdkdkdld lodldld lldld lldld lldld
  ldldld {codein1}
    cpinternal iso8859-1 -cpcoll basic -Bt 350 -c 30 -D 100 -mmax
    3000 -d dmy -nb 2 {codein2}
      00 -s 48 -yy 1950 -E {codein3}

$DLC/bin/_progres \ {codesp}
  $DBNAME -ld db \kfkfdkdkdkdld lodldld lldld lldld lldld
  ldldld {codein1sp}
    -cpinternal iso8859-1 -cpcoll basic -Bt 350 -c 30 {codein2sp}
      00 -s 48 -yy 1950 -E {codein3sp}
        00 -s 48 -yy 1950 -E {codein4sp}
        00 -s 48 -yy 1950 -E {codein4}
          00 -s 48 -yy 1950 -E {codein5sp}
          00 -s 48 -yy 1950 -E {codein5}
            00 -s 48 -yy 1950 -E {codein6sp}
            00 -s 48 -yy 1950 -E {codein6}
```

Character Screens

If you are documenting a product or feature that is only available in a character-interface version, you can create text-based screen images by following these steps:

- 1 Copy the screen as text.
- 2 Paste the text into an anchored frame within a text box in the FrameMaker document.
- 3 Use the `{screen}` tag to format the screen text appropriately


```

utmtzon.p 99      11.21.22.24 Multiple Time Zones Startup Util      04/18/97
+-----+
|           Multiple Time Zones: no
|           Server Time Zone: PST/PDT
|
|
|           Update: no
|
|
|           Output:
|           Batch ID:
+-----+

```

Fig. 1.5
Multiple Time
Zones Startup
Utility
(11.21.22.24)

Note The `{screen}` tag must only be applied to text inside a FrameMaker anchored frame.

During the early stages of documentation development when GUI screens are not available or change frequently, you may want to use character screen captures as placeholders. You can use the text method or use Fullshot to create .pcx files and import them into documents in the same manner as GUI screen captures.

Equations

Apply the `{equation}` tag to equations to give them a special format so that they stand out from normal text. Since formulas can be very long, it uses a small font size.

$$\text{Engineer Points} = \text{Availability} + (2 * \text{Availability}) + (2 * \text{Primary}) + \text{Area} + \text{Problem} \text{ **{equation}**}$$

If you create an equation that spans two lines, ensure that the line break does not separate logically related elements. Use nonbreaking spaces to keep elements together.

Prompt

The `{prompt}` tag is used mainly in the installation guides. There are multiple indented forms so that it can be used in stepped procedures to format information displayed to the terminal. Pagination is defined as keep with previous because it is often used for a message explained by the previous paragraph.

```

This is a line of prompt text. {prompt}
    This is an indented line of prompt text. {promptsub1}
        This is the next level indented line of prompt text.
{promptsub2}

```

You can also use the **{prompt}** tag to format directory paths, file names, and so on as separate paragraphs that display in a monospace font. This is especially useful for long directory paths, since the **{prompt}** tag uses a smaller font size than the `monofont10` character tag. See “Character Tags” on page 26 for details.

Field

Online help is generally formatted in Microsoft Word, but many of the tags used to format it also exist in FrameMaker. The tags used in online help include the **{field}** tag, used to identify field help records.

For more information on styles used in help, see the help template, `tmpl1t87_hlp.dot`.

Use the **{field}** tag to format field descriptions in FrameMaker. It is designed as a run-in head. To create a field description in FrameMaker:

- 1 Type the field label as a separate paragraph formatted with **{field}**.

Important Do not type a period at the end of the field label. The **{field}** tag includes a period. If you type an additional one, it will display in the HTML even though FrameMaker suppresses the display in the source file.

- 2 Then, type the description as a separate paragraph formatted with **{bodysub1}**.

The following is an example of a field label and description:

*Area **{field}**.* Specify a unique, eight-character code that identifies a geographic area. Use up to 8 alphanumeric characters. **{bodysub1}**

Note In the Microsoft Word help warehouse, the **{field}** tag is followed by **{body}**, not **{bodysub1}**.

Glossaries

Define key terms related to a set of functions in a glossary. These terms are eventually merged with the standard glossary. Use **{glossitem}** to format each term and **{glossbody}** for the definition, as in the following example:

End User {**glossitem**}. A person who normally uses an item, requests maintenance for it, and reports problems. Each sold-to customer can have many end users. {**glossbody**}

Important Do not type a period at the end of the glossary term. The {**glossitem**} tag includes a period.

One other tag can be used in glossary entries, if needed. Use the {**glosslist**} tag to create a bulleted list associated with a term, as in the following example:

Netting Logic. Determines how the software calculates the required shipping schedule. There are three options:

- If 1, only shipping schedules are used.
- If 2, only planning schedules are used.
- If 3, combine the planning and shipping schedule, with the shipping schedule taking precedence in the interval the schedules overlap (replace logic).

Write glossary terms in title format with leading capital letters and organize them alphabetically. When writing glossary definitions, use a style appropriate for a glossary. Do not include user instructions, keyboard shortcuts, or any type of software-specific information in the definition.

You can use the glossary xref cross-reference format to create cross-references in glossary entries to other related terms. These cross-references display as hypertext links in HTML and make it easy for users to navigate in the document.

Browse. An inquiry program that displays records in a tabular format. Look-up and drill-down browses are associated with individual fields for use in selecting entry values. See also *Drill-Down Browse* and *Look-Up Browse*.

You should also use glossary xref cross-references to create glossary entries for acronyms and link them to their associated full-term entries, as in this example.

CIM. See *Computer Integrated Manufacturing (CIM)*.

Running Heads

FrameMaker templates use master pages to define page layouts and running heads.

- **{headerright}** on the right-hand page automatically displays the appropriate unit name, based on the definition of one of four system variables; see page 38.
- **{headerleft}** on the left-hand page is used for the volume title and is updated using a variable named Book Title; see page 40.

Note In previous versions of the template, the left header text was manually typed on the master page. If your document does not use the current template, updating the Book Title variable has no effect.

Cross-References

See “Cross-References” on page 22 **{xref}**.

Use the **{xref}** tag to format references to material that is not directly adjacent to the current topic. This tag displays text in the sidebar. You should enter it as a separate paragraph *before* the text to which it refers. These are typically mapped to no output in HTML output.

See “Cross-References” on page 22 **{xxref}**.

If you want to use a cross-reference in the sidebar that is not retained in HTML output, you can use the **{xxref}** tag to format the reference. This is useful when the only a subset of a book is included in the help and you want to omit references to files that are not included. See “Controlling Cross-References” on page 43 for a discussion of how to use this tag.

Important Never insert a cross-reference paragraph immediately before another sidebar element, a heading, a graphic, or a table. It distorts the line spacing.

Cross-references themselves are entered using the Special|Cross-Reference dialog. The formats are predefined as part of the template and are based on template tags. You should use them without modification.

Introduce cross-references with the phrase *See...* rather than *Refer to...*

If you want to reference a figure or table that directly follows, enter the cross-reference as part of the introductory paragraph rather than using the **{xref}** tag. You can also use the cross-reference formats to build a list of headings. Use one of the following formats:

- “Heading”

- “Heading” on page #
- Heading

These lists are updated automatically during book generation.

Important Always use the automated cross-reference tools to refer to other parts of a document such as headings, chapters, figures, and tables. Never manually enter a heading or number. The only exception to this is a reference to a different physical book, such as another volume of the user guide set.

Designing Cross-References for Single Source

Previously, standard procedure was to format cross-references as stand-alone paragraphs tagged as **xref** to display in the sidebar.

However, HTML does not support sidebar elements; it renders each paragraph, one after another down the page, in the order received. As a consequence, in online help, the **{xref}** style precedes the paragraph that it applies to. This placement of such parenthetical information can significantly disrupt the primary information flow.

For books that will be converted to online help, embed cross-references in the normal paragraph text flow; avoid using sidebar cross-references. To remove the sidebar cross-references, apply the **{xxref}** tag to them.

When using cross-references, take into account the following considerations:

- Use references to headings when possible.
- Avoid references of the form “on page x,” when *page x* is the live cross-reference. These do not convert well in an HTML context.

Cross-Reference Formats

Table 1.2 lists cross-reference formats in the order in which they display in the Cross-Reference dialog.

Note Not all listed formats may display in your book. The appendix formats exist only if your book has an appendix. The glossref format is used only in glossaries.

Table 1.2
Cross-Reference
Formats

Format Name	Looks Like...	Use with
“Heading”	“Why Styles?”	Any heading
“Heading” on page #	“Why Styles?” on page 6	Any heading
#	1	Any autonumber: step1, step, substep1, substep
# (page)	6	To refer to a page number only
Appendix #	Appendix A	apndxnumber
Appendix #, “Title,”	Appendix A, “Sample Appendix,”	apndxunit
Appendix #, “Title,” on page #	Appendix A, “Sample Appendix,” on page 61	apndxunit
Chapter #	Chapter 1	unitnumber
Chapter #, “Title,”	Chapter 1, “Using FrameMaker Templates,”	unit
Chapter #, “Title,” on page #	Chapter 1, “Using FrameMaker Templates,” on page 5	unit
ChapterTOC	<i>Why Styles?</i> 6	1head
Figure #.#	Figure 1.2	figure
Figure #.# on page #	Figure 1.2 on page 13	figure
Figure #.#, “Figure,” on page #	Figure 1.2, “Figure Title for Diagrams, Graphics, and Screen Captures {figure},” on page 13	figure
Heading	Why Styles?	Any heading; not for {xref} format
Page #	page 6	Any tag
Section #, “Title,” on page #	Section 1, “Appendices,” beginning on page 59	section
step # on page #	step 3 on page 8	steps
Table #.#	Table 1.2	table
Table #.# on page #	Table 1.2 on page 24	table
Table #.#, “Title,” on page #	Table 1.2, “Cross-Reference Formats,” on page 24	table
Table Footer	Table 1.2 — <i>Cross-Reference Formats</i> See Table 1.16 on page 48 for an example.	Tables that span multiple pages

Tags for Highlighting Text

Some paragraph tags are used to highlight the nature of the associated text. These tags are built with an introductory term defined with the autonumber format in the paragraph designer. They are not defined as run-in headings using the pagination run-in head format.

The **{example}**, **{note}** and **{important}** tags both have indented counterparts that can be used after bulleted, numbered, or **{bodysub1}** paragraphs. See “Lists” on page 11 for examples.

Example Use this tag to introduce a short example illustrating a more general concept being discussed. It should have no additional heading, and should immediately follow the related general material. Examples should be clear and concise. **{example}**

Example Use this tag for examples that are part of subordinated text such as lists. **{examplesub}**

For examples that are longer than one paragraph, consider using a standard heading.

Note Use this tag to draw attention to special information about using the software. Notes are often used to call out exceptions to general rules or special conditions. Be careful not to overuse them. **{note}**

Note Use this tag for notes that are part of subordinated text such as lists. **{notesub}**

Important Use this tag to draw attention to critical pieces of information. Use this tag rather than a warning, unless actual data corruption or loss results from not understanding the point being made. **{important}**

Important Use this tag to draw attention to critical pieces of information. Use this tag rather than a warning, unless actual data corruption or loss results from not understanding the point being made. **{importantsub}**

Warning Use this tag to warn users about actions that could cause data corruption or loss. Warnings are typically used in installation and conversion instructions. In user information, warnings should accompany procedures that make irreversible mass updates to database records.

{warning}

Annotation 1 Use this tag during information development for notes that are not part of the actual document, such as notes to yourself or notes to a reviewer. Annotations are numbered for ease of reference.

Annotations display as red text on a color monitor. Generate a list of annotations before sending the book for review. You must remove any text with this tag before submitting a document for publication.

{annotation}

Character Tags

Use character tags—listed in Table 1.17 on page 52—to apply special formatting to particular words within a paragraph. While a number of character tags are defined in the template, most are used with a particular paragraph tag. Character tags available for general use are ALLCAPS7.5, ALLCAPS8.5, **bold**, *Emphasis*, monofont10, monofont (as is), ~~striketrough~~, [urllink](#), variable10, variable (as is).

The link character format is an *as is* format that is used to define the active area for a hyperlink. It is only visible in PDF and HTML. It is used with hypertext markers, when these are more effective than cross-references.

Note Other character tags are used as part of paragraph formats, such as the formatting of **Note** in the note paragraph tag, which uses *run-in*.

These tags include **fig**, *run-in red*, **smallbullet**, and **stepnumber**, which add accents to other paragraph styles.

The symbol tag is available if a Greek letter is needed in an equation or formula, such as:

$$\Pi \{\mathbf{symbol}\} = 2R$$

The **unittoc** character tag is used for page numbers in the chapter table of contents listing.

Keep the following important rules in mind when you use character tags:

- Apply special formatting only to elements that require it.
- Never format text using character format commands on the toolbar or menu; for example, to italicize it or make it bold. Instead, use the appropriate character tag.
- Do not apply character tags to heading text. Since the heading itself is indicated by a font change, another font change can be confusing. In addition, applying character tags to headings adversely affects automatic hypertext links.
- Do not use small caps as a character format. This formatting is not preserved in HTML and the characters will revert to lowercase. Use `{allcaps7.5}` and `{allcaps8.5}` to emulate smaller capital letters.
- If you need to change the character format applied to a text item, you *must* do it in two steps:
 - First, apply the default paragraph font to remove the current character format.
 - Then apply the character format you now want to use. You may need to reapply the paragraph format to make this change apply.

Important If you do not remove the original character format, the text actually retains both the new and the old. This can create problems with HTML conversion and other changes made later.

Use the `monofont10` and `monofont` character tags to format references to the following interface elements:

- Directory paths
- File, program, and database file names
- Screen output, including system-generated prompts and messages
- Commands or parameters

Use `monofont10` when the surrounding text is 11 pt. Use `monofont` in tables and sidebars, where the size difference between Courier New and Times New Roman is less pronounced.

The `variable10` and `variable` character tags are similar to the `monofont10` and `monofont` character tags, with the addition of italics. Use these tags to format references to interface elements when an element name must be supplied by the user. This occurs almost exclusively in the installation guides.

Example Modify the `PROMSGS=` setting to use a language-specific Progress messages file (`promsgs.LanguageCode`).

Note To format directory paths, file names, and so on as separate, indented paragraphs, use the **{prompt}** paragraph tag; see page 19. For long paths that do not fit on a single line, you can also use one of the code tags, which is a smaller font.

Use the dingbat character tag for special characters such as check marks (3) in tables. The check mark is the numeral 3 with the dingbat character tag applied. Since dingbat symbols other than the check mark do not translate directly to HTML, check with the online help and Web coordinator before using other dingbat characters in documents.

Use [urlink](#) to indicate a live link to a Web page. “Using Markers to Create Active URL Links” on page 45 discusses how to do this.

Never use quotation marks to highlight a word or phrase. The *Emphasis* tag is appropriate when introducing a new term or unusual word.

Tables

Tables are important information design elements that add variety and simplify presentation. A number of template elements are used in combination to support creating tables:

- Table designs can be applied through the table designer.
- Some paragraph tags are designed to be used with table rows.
- Special formatting applies to table headings and footings.

During conversion to HTML, standard tables are adjusted to a percentage of the width of the online help page; this is called dynamic sizing. Most of the time, dynamic sizing produces optimal results; however, when the table has very little text, the dynamic resizing can make it hard to read the content. For these cases, alternative static-size table tags are provided. Static tables are sized the same in HTML as they are in FrameMaker.

Use the static-size table styles when the table should not be spread across the width of the page, such as when there is very little data in each column. Table 1.14 on page 35 is an example of a table that is more readable in HTML when it is formatted as a static table. Since the

columns have little content, it is better to keep them close together. Table 1.15 on page 47, on the other hand, should be a standard dynamic table.

Table Formats

The following table formats are provided in FrameMaker:

- Use the left and indent (or indentStaticSize) table formats to create open-looking tables, aligned as indicated by the format name. These tables have a heading row with a single rule.
- Use the megarule family of table formats to create tables with borders around each cell. This type of table is useful for information that is difficult to read in the more open format and is common in the installation guides.
 - Megarule and megaruleStaticSize are aligned with the left margin.
 - Megarulein1 and megarulein1StaticSize are indented .25 inches.
 - Megarulein2 and Megarulein2StaticSize are indented .5 inches.
 - Megarule-title is left aligned with a title that is part of the table. Use this format to define extra-wide tables in documents without sidebars. Often, this type of table is included in an appendix or reference chapter and may be used in a rotated page.
- The prompt, prompt2, promptStaticSize, and prompt2StaticSize tables have an open format with no heading. Use these tables for displaying fields and user input. They work well in stepped procedures for indicating what the user must enter. Also use them to create multi-column lists. Prompt aligns with step text and prompt2 with substep text.

Important Make sure your tables with headings have real heading rows (see page 34). Otherwise, they will not display correctly in HTML.

Paragraph Tags for Tables

The paragraph tags provided for formatting text and graphics in and around tables include `{cellcenter}`, `{celleft}`, `{celleftthang}`, `{cellright}`, `{celllist}`, `{cellhead}`, `{cellheadcenter}`, `{cellheadright}`, `{graphictable}`, `{table_wide}`, `{tablespacer}`, `{tablefooter}`, `{table}` and `{tableNoOutput}`.

The `{table}` and `{tableNoOutput}` tags in FrameMaker are applied to the table title. They are autonumbered and derive the initial part of the number from the `{unitnumber}` tag. `{tableNoOutput}` is the same as `table`, but lets you map selected table titles out of the HTML online content.

Use the following sequence of tags to insert tables in FrameMaker:

- 1 The `{table}` tag places the table caption in the sidebar. You must manually add a forced return between the table number and the caption.
- 2 Pressing return at the end of the table caption adds another paragraph that is tagged `{tablespacer}`. This contains the anchor for the table.
- 3 To insert a table, choose Table|Insert Table when your cursor is located in the `{tablespacer}` paragraph. Select the appropriate format from the list.

A few special-purpose tags used with tables warrant some explanation:

- Use the `{celleftthang}` tag to format system commands that appear as multiple lines in a table but are typed as one line. This tag is most typically used in installation materials.
- Use the `{graphictable}` tag to format graphics in table cells so that they can be correctly converted in HTML.
- Use the `{table_wide}` tag to format text in the title row of a megarule-title table. For these tables, the `{table}` tag is not used since there is no sidebar. For these tables, do not insert a forced return between the table number and the title.

Table Examples

The following examples illustrate the standard table formats and the paragraph tags you can use with them. This first table will not have a title in the HTML because its title is tagged as **{tableNoOutput}**.

Note In these examples, cell text styles are used arbitrarily. Most tables use **{cellleft}** text only.


{cellhead}	{cellheadcenter}	{cellheadright}
{cellleft}		{cellright}
<ul style="list-style-type: none"> • {celllist} • {celllist} 		
	<p>The anchor for the above graphic is formatted with {graphictable}.</p>	
{cellleft}	{cellleft}	{cellright}
This text is formatted with {celllefthang} .	{cellleft}	{cellright}

Table 1.3
{indent} Table

The following is the static version of the indent table.

{cellhead}	{cellheadcenter}	{cellheadright}
{cellleft}	{cellcenter}	{cellright}
{cellleft}	{cellcenter}	{cellright}
{cellleft}	{cellcenter}	{cellright}

Table 1.4
{indentStaticSize}
Table

{cellhead}	{cellheadcenter}	{cellheadright}
{cellleft}	{cellcenter}	{cellright}
{cellleft}	{cellcenter}	{cellright}
{cellleft}	{cellcenter}	{cellright}

Table 1.5
{left} Table

{cellhead}	{cellheadcenter}	{cellheadright}
{cellleft}	{cellcenter}	{cellright}
{cellleft}	{cellcenter}	{cellright}
{cellleft}	{cellcenter}	{cellright}

Table 1.6
{leftStaticSize}
Table

Table 1.7
{megarule} Table

{cellhead}	{cellheadcenter}	{cellheadright}
{cellleft}	{cellcenter}	{cellright}
{cellleft}	{cellcenter}	{cellright}
{cellleft}	{cellcenter}	{cellright}

The following is the static version of the megarule table.

Table 1.8
{megaruleStaticSize} Table

{cellhead}	{cellheadcenter}	{cellheadright}
{cellleft}	{cellcenter}	{cellright}
{cellleft}	{cellcenter}	{cellright}
{cellleft}	{cellcenter}	{cellright}

Table 1.9
{megarulein1} Table

{cellhead}	{cellheadcenter}	{cellheadright}
{cellleft}	{cellcenter}	{cellright}
{cellleft}	{cellcenter}	{cellright}
{cellleft}	{cellcenter}	{cellright}

The following is the static version of the megarulein1 table.

Table 1.10
{megarulein1 StaticSize} Table

{cellhead}	{cellheadcenter}	{cellheadright}
{cellleft}	{cellcenter}	{cellright}
{cellleft}	{cellcenter}	{cellright}
{cellleft}	{cellcenter}	{cellright}

Table 1.11
{megarulein2} Table

{cellhead}	{cellheadcenter}	{cellheadright}
{cellleft}	{cellcenter}	{cellright}
{cellleft}	{cellcenter}	{cellright}
{cellleft}	{cellcenter}	{cellright}

The following is the static version of the megarulein2 table.

Table 1.12
{megarulein2 StaticSize} Table

{cellhead}	{cellheadcenter}	{cellheadright}
{cellleft}	{cellcenter}	{cellright}
{cellleft}	{cellcenter}	{cellright}
{cellleft}	{cellcenter}	{cellright}

When you need more space, use the megarule-title table. These often occur in Appendices. The caption is not in the side bar, but uses a special table title tag.

Table 1.13 megarule-title Table Tag `{table_wide}`

<code>{cellhead}</code>	<code>{cellheadcenter}</code>	<code>{cellheadright}</code>
<code>{cellleft} {cellleft}</code>	<code>{cellcenter}</code>	<code>{cellright} {cellright} {cellright} {cellright} {cellright}</code>
<code>{cellleft} {cellleft}</code>	<code>{cellcenter}</code>	<code>{cellright} {cellright} {cellright} {cellright} {cellright}</code>
<code>{cellleft} {cellleft}</code>	<code>{cellcenter}</code>	<code>{cellright} {cellright} {cellright} {cellright} {cellright}</code>

Prompt tables have no heading row. They are generally used to emulate multiple columns. In this case, the cell text should be tagged to fit with the surrounding paragraphs, as if this were not a table; do not use the cell tags, which are a smaller font. The table title is also omitted, as in the following examples.

Example All of the following fields are included:

- Site
- Location
- Customer
- Price
- Sold-To
- Amount

The following is the static-size prompt style.

- Site
- Location
- Customer
- Price
- Sold-To
- Amount

You can also use an indented prompt2 table.

- Site
- Location
- Customer
- Price
- Sold-To
- Amount

The following is the static-size prompt2 style.

- Site
- Location
- Customer
- Price
- Sold-To
- Amount

Other Table Elements

Most tables, except for the Prompt table format, have headings. Some may also have footings. Occasionally, you may also need to use footnotes with tables.

Table Headings

When you add a new table with one of the standard table formats, it is created automatically with a heading row. The heading repeats if the table spans more than one page.

Note The Prompt table is an exception. By default, it has no heading row.

If you want to add a heading to an existing table, make sure you do not simply add a row and format with a cell heading tag. This kind of row is not repeated when the table breaks across pages. Also, the correct shading is not applied when the table is converted to HTML. To add a true heading, you must use the Add Rows or Columns dialog box and select To Heading from the Row(s) drop-down list.

Table Footings

Some tables span multiple pages. Since the table title is not part of the table, use table footings to orient readers. You should add a footing whenever a table extends over more than one full page. Table 1.16 on page 48 is an example of a table with a footing.

To create a table footing:

- 1 Choose Table|Add Rows or Columns, select To Footing from the Row(s) drop-down list, and click Add.
- 2 Select the entire footing row and choose Table|Straddle.
- 3 If you are using one of the Megarule table formats, use the Custom Ruling and Shading dialog to remove all borders around this row.
 - a Select the entire footing row.
 - b Choose Table|Custom Ruling and Shading.

- c In the Custom Ruling and Shading dialog, select the Custom Cell Ruling check box.
 - d In the Apply Ruling Style scrolling list, select None.
 - e In the Outside Edge frame, select Top, Bottom, Left, and Right.
 - f Click Apply.
- 4 Insert a cross-reference to the table title using the Table Footer cross-reference format. This is followed by a space and an em dash.
 - 5 Choose Special|Variable and insert the system variable Table Sheet.
 - 6 Format the footing with the **{tablefooter}** paragraph tag.
 - 7 Select the entire footing row and choose Special|Conditional Text and apply the PrintOnly condition.

Note The PrintOnly condition is set to always show in FrameMaker. The row will not be displayed, however, when converted to HTML.

Table Footnotes

Footnotes are not typically needed in user guides and should be avoided. However, in complex table information, you may occasionally need to add footnotes. Table 1.14 illustrates a table with a footnote.

Important Footnotes should not be used in any other part of a document.

Status	Tax System	pod_taxable	prh_tax_at
Taxable	VAT	Yes	VAT class
	GTM	Yes	“Yes”
Nontaxable	VAT	No	“0” ¹
	GTM	No	Blank

1. First VAT class with a zero percentage.

To add a footnote:

- 1 Position the cursor where you want the footnote to display.
- 2 Choose Special|Footnote.
- 3 Apply the **{footnote}** tag to the footnote text.

Table 1.14
VAT to GTM,
Purchasing
Transactions

Sometimes you may need to apply the same footnote to more than one table cell. To do this, follow these steps:

- 1 Create the first footnote.
- 2 Position the cursor where you want the second footnote.
- 3 Choose Special|Cross-Reference.
- 4 Choose footnote as the paragraph tag to reference and # as the format. Then select the appropriate footnote and click Insert.

Other Template Elements

This section discusses other elements defined by the FrameMaker templates including the following:

- “Master Pages” on page 36
- “Color” on page 37
- “Variables” on page 38
- “Text Options” on page 41
- “Hyphenation” on page 42
- “Conditional Text Settings” on page 42

Master Pages

The master pages determine the basic page layout, including the page size, horizontal or vertical layout, the position and content of the running header and footer, and the position of graphical elements.

Most parts of a user guide (TOC, preface, chapter, section, glossary, index, appendix) are defined with three master pages: right, left, and first. The text area on the first page is smaller than right and left pages and, for chapter files, includes a background graphic.

Note The title page has only two pages: right and left.

Because the master page determines the content of the running headers, different parts of a book require different master pages. For example, the system variable used for the header in a preface is different from a standard chapter file. See “Variables for Running Headers” on page 38 for more details.

Other types of books may require special master pages. This is particularly true when technical reference information is displayed in tables. The small page size may require pages to be rotated to display wide tables. To do this requires new master pages.

Important When you update the template in a book, be very careful about importing master pages. Importing master pages can cause problems when:

- You import the master page from a template that does not correspond to the part of the book you are updating. For example, you import the master page from the preface template into the index.
- The book file you are updating uses special master pages.

When you import formats, the master page format is updated when Page Layout is selected. “Updating Formats” on page 8 describes how to do this.

Color

The template uses color and color graphic elements.

- Each chapter table of contents page has a color background graphic.
- Pantone 285 is applied to the following elements:
 - Bullets
 - Page numbers
 - 1head, 2head, and 3head
 - List numbers (step1, step, substep1, substep)
 - Figure caption numbers (for example, Fig. 7.1)
 - Table caption numbers
 - Text formatted with dingbat or urllink character tags; for example, the arrow character in sidebar cross-references

- The company logo (the horizontal version, with color) displays in the footer of each regular (non-first, non-special) page.
- Text formatted with the **{annotation}** tag displays in red.

Variables

The four system variables used in running headers must be defined consistently across the book. The Table Sheet variable also has a custom definition. In addition, the template includes the following user-defined variables: Draft, Confidential, Book Title, Product Name, and Current Release.

Note Installation guides use some special variables; see “Template Exceptions” on page 47.

Variables for Running Headers

The system supplies four variables for running headers. They should be defined across a book as follows:

- Running H/F1, <paratext[unit]>
- Running H/F2, <paratext[unitnonnumber]>
- Running H/F3, <paratext[apndxunit]>
- Running H/F4, <paratext[section]>

Note The running header in the table of contents file is not defined with a variable. Since it never varies from Contents, the word Contents is typed as the header.

When these variables are defined like this and the correct master pages are being used, you can import variables across an entire book without affecting the running headers.

Important Make sure you have only Variable Definitions selected in the Import Formats dialog since you cannot import other types of formats across an entire book. See “Updating Formats” on page 8 for details.

Table Sheet Variable

By default, FrameMaker defines the Table Sheet variable as:

```
(Sheet <$tblsheetnum> of <$tblsheetcount>)
```

This variable is used in table footings—see page 34—and has been redefined in the template to use Page rather than Sheet:

```
(Page <$tblsheetnum> of <$tblsheetcount>)
```

Draft Variable

The phrase “Draft documentation. Subject to change.” that displays in the footer is set with a variable named Draft. All documents that have not been approved for final publication should have this phrase in the footer. This includes new documents being developed as well as pre-release or draft versions of existing manuals that have been updated.

Use this variable when sending out draft documentation to DG members or posting draft documents on the Solution Center.

When a document has been through the entire editing cycle and is submitted for final publication, you must set the value of the Draft variable to one space, so that the footer no longer prints.

To do this:

- 1 Choose Special|Variable.
- 2 Select Draft from the scrolling list and click Edit Definition.
- 3 In the Edit User Variable dialog, replace the text in the Definition field with a single space and click Change.
- 4 Click Done.

If you need to publish a draft document, you should also change the title page to reflect the draft status.

- 1 Remove the item number and replace it with the word Draft.
- 2 Add the specially formatted Draft text block to the title page. See the sample draft title page that is part of the user guide template.

Confidential Variable

The Confidential variable is similar to draft. It displays the phrase “Confidential. Do not copy.” Use this variable when distributing documents intended for an internal audience only.

Book Title Variable

The left-hand header is set with two variables: Book Title and Product Name. Product name typically does not change. To set Book Title correctly for your book:

- 1 Choose Special|Variable.
- 2 Edit the definition of Book Title to reflect the name of your book.

In a multi-chapter book, set the variable in one chapter, then import the variable definition across all other files in the book. To do this:

- 1 From the book file, select all files in the book.
- 2 Choose File|Import|Formats.
- 3 In the Import Formats dialog, select the appropriate chapter in the Import from Document drop-down list.
- 4 Check Variable Definitions. Make sure that no other options in this dialog are selected.
- 5 Click Import.

Warning The *Database Definitions* book requires customized variables and master pages. Do not import variables across the entire book.

Product Name Variable

When you need to make a reference to the software in the user documentation, do this by inserting the Product Name variable rather than manually typing the product name.

Example Control programs let you adapt Product to your environment.

Be aware, however, that the Product Name variable is not appropriate in all cases. You should manually type the product name instead of using the variable when you need to refer specifically to more than one software release. For example, refer to *Product Version 8.6, 9.0, and 9.1*.

These references are most common in installation guides, external interface guides, and bolt-on product guides.

Note When in doubt, it is better to type the product name rather than using the variable. The variable has created its own set of problems in the past and we may discontinue using it.

Current Release Variable

The Current Release variable is used on the master page as part of the book title. It is also used in the Release Bulletin as a convenience since there are so many references to the specific release number.

In other cases, when you need to reference a specific release, including the current one, you should type the product name and the release number. This ensures that the context is preserved if the value of the variable changes.

Text Options

Text options, defined with Format|Document|Text Options, are imported with template formats. The template uses the following options:

- Smart Spaces is on.
- Smart Quotes is on.
- Allow Line Break After is set to:

- = \m|

To maximize the effectiveness of these options, make sure your options in the spelling checker include finding straight quotes and extra spaces. If spelling checker is set not to include the period (.) in the Space Before list, you can avoid errors on file extensions such as .xml.

The text settings do not allow breaks after a slash character (/) to prevent frequently used names from breaking at the end of a line. However, a side effect of this is that a long string in a sidebar element can wrap in an odd

place. For example, a graphic titled Manufacturing/Design Update would not display correctly. Keep this in mind when using the slash. In general, using *and* is preferred to using the slash.

Hyphenation

Automatic hyphenation is currently not enabled for any of the template tags. You can let hyphenated words such as *cross-reference* break at the hyphen when they are located at the end of a line. When the hyphenated portion of the word is very small, it is better to use a nonbreaking hyphen to prevent separating the two parts. For example, use a nonbreaking hyphen for words such as *3-character* string.

Use the Esc, -, h key sequence to type a nonbreaking hyphen.

Conditional Text Settings

The template contains only one conditional text setting. When the PrintOnly condition is applied, the associated text is unchanged in FrameMaker. However, when the conditional text is converted to HTML with WebWorks publisher, it does not display in the HTML.

PrintOnly is currently used to suppress table footings in HTML. It can be used in any other situation where it is appropriate to leave text or graphics out of the HTML.

Using conditions consistently across a document set requires careful planning.

Important If you choose to use conditional text during information development, all condition markers must be removed entirely before the document is received into production.

Inconsistent conditional text settings cause errors during printing. Conditional text can also cause problems during conversion to HTML using WebWorks Publisher.

Note The Find/Replace function in FrameMaker cannot find conditional table rows.

Elements for Online Help

FrameMaker books to be converted to online help require additional tags to provide more control during conversion.

Tags for Controlling HTML Output

The following tags can be used to ensure that elements are not included during conversion to an online help file:

- Use `{xxref}` to exclude a cross-reference in the sidebar from conversion.
- Use `{figureNoOutput}` to exclude graphic captions from conversion.
- Use `{graphicNoOutput}` to exclude the anchored frame and its content during conversion.
- Use `{tableNoOutput}` to exclude table titles from conversion.

Controlling Cross-References

HTML output does not use page numbers and displays cross-references as active links with a different color. When writing for online viewing, you can embed cross-references in paragraph texts that are not visible in the printed book or PDF, but become active links in the HTML. You might do this when referring to a program.

In the following example, the references to Master Pages is actually a cross-reference in the Heading format. So readers of the printed book can find the topic, you need to include an addition side-bar cross-reference, that is not included in the HTML. It is tagged with the `{xxref}` tag.

Example Use Master Pages to control headers and footers.

See page 36.

Avoiding References to Numbers

Some cross-reference formats do not work well in online help formats. You should avoid using the Chapter #, Appendix #, and page # formats. These all map to the string *this topic*. Since no paragraph text is associated with these formats, nothing else can be used in the mapping. If you have a sentence such as:

Chapter 1 provides an overview of processing options.

It will be mapped to:

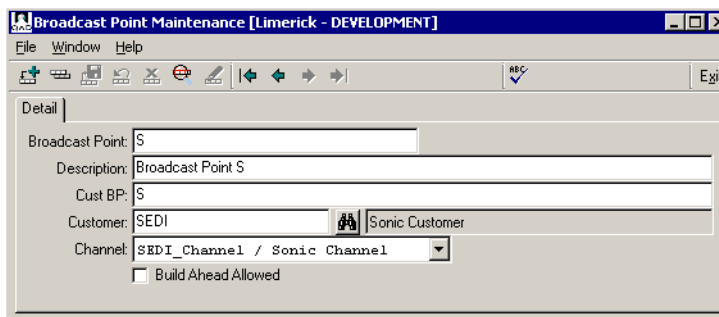
this topic provides an overview of processing options.

This is not a good outcome.

Controlling Table Title, Figure, and Caption Output

The following figure caption and screen shot will not be included in the HTML output generated by WebWorks. The graphic anchor is tagged with the **{graphicNoOutput}** style.

Fig. 1.6
Broadcast Point
Maintenance
{figureNoOutput}



Typically, when you create online help, you choose to always include or exclude graphics and titles. However, you can discard most titles while retaining some that have special significance. However, be aware of the following. In the help output, figure numbers are stripped from the figure caption. In dynamic HTML, they are not. If you do choose to include some captions and exclude others, the numbers in the dynamic HTML reflect the source, so figures may be numbered Figure 1, Figure 3, Figure 4, and so on.

The same principles apply to table titles. Some or all of these can be mapped to tableNoOutput.

You also need to be careful with cross-references. If you create a cross-reference to a figure caption or table caption that is being excluded from the output, the link will still be live and display the page, but there will be no specific focus or reference for the user.

Generating Collapsible Text

Use the DropHead tag to introduce lists of fields or other text that you want to let users collapse or open in the online version of the book. This section must be followed by a DropDownEnd marker that indicates where the collapsing of text should stop.

Note The following is here as an example and useful for testing conversions.

Field Descriptions

Channel Type. Channel types are members of the channel_type class set up in Tools\System Data Tools\Class Code Maintenance.

Inbox Directory. This directory defines where files containing broadcast messages to be processed by this channel are located.

Note This last paragraph ends with a DropDownEnd marker.

Designing Context-Sensitive Help

The custom TopicAlias marker is included in the template to support single-source development of context-sensitive help.

Using Markers to Create Active URL Links

A Uniform Resource Locator (URL) indicates the location of a file anywhere on the Internet or on an intranet. Using features in the user guide templates, you can embed special markers in a FrameMaker document that become direct links to a URL when the document is saved as HTML or PDF.

Prepare the Text

For a text string to be used as a link, it must be identified with character formatting that sets it apart from the rest of the paragraph containing it.

- 1 Select the text that you want to act as a URL link.
- 2 Apply the urlink character format to it.

Note Typically, the paragraph is tagged bodysub.

Insert Marker

- 1 Select the formatted text and choose Special|Hypertext.
- 2 Select Goto URL from the Command drop-down list. This adds the message URL command to the command text area. Enter the URL after this command. For example:
message URL <http://www.company.com>
- 3 Click New Hypertext Marker to establish the link.

Fig. 1.7
Hypertext Window



Note You can also use the Message Client command to create the same kind of marker, but in this case you must type URL after the message command.

Here is an example of a link that is active when converted to PDF or HTML:

<http://support.company.com/>

Test the Link

You can test whether text has been correctly activated as a link by pressing Ctrl+Alt and then clicking the link area. In a FrameMaker document, this will activate the Hypertext marker.

Template Exceptions

In some special cases, variations on the standard user guide template are used. These apply mainly to external interface guides and installation guides.

Table 1.15
Template
Exceptions

Book	Exception
Service Packs	<ul style="list-style-type: none"> Variables in running header are different than user guides. Page layout is different: 8.5 x 11 and no sidebar. Because there is no unit number, table and figure tags with autonumbering do not use the x.x convention.
User Guide Volume 1: Introduction	<ul style="list-style-type: none"> First chapter has graphics with runaround property set on.
All External Interface Guides	<p>Do not include the Current Release variable in the left header. When importing page layout, the variable must be removed from the master page.</p> <p>Windows GUI screen captures are allowed rather than Desktop screens since the book applies to releases of the software before Desktop was introduced.</p>
EIG: Q/LinQ EIG: Advanced Planning and Optimization EIG: Demand Planner	Contain rotated master pages to display wide tables.
EIG: Decision Support	Uses nonstandard character formatting for user interface elements.
Installation Guide: Progress	<p>Includes three variables:</p> <ul style="list-style-type: none"> MID (InstallDir, variable10) MIDsmall (InstallDir, variable) Desktop (Desktop) <p>Graphics imported at lower DPI than user guides.</p>
Installation Guide: Oracle	Graphics imported at lower DPI than user guides.
Conversion Guide	<p>Includes variables:</p> <ul style="list-style-type: none"> TVInstall (TargetVersionInstallDir) Desktop (Desktop) <p>Graphics imported at lower DPI than user guides.</p>

Book	Exception
Database Definitions	Header for content is set up in telephone style. You cannot import variables across this book. Uses different paragraph and table styles for the schema content. See the <i>KE Production Handbook</i> for details on creating Database Definitions.
KE Handbook	Chapter 9 and Chapter 10 of are loosely based on the glossary template, with a two column master page. They use two new tags—word and word_desc—instead of the standard glossitem and glossbody. This is because we didn't want to use the period separator that the glossary uses.

Tag Summaries

The following tables list:

- Paragraph tags for a regular chapter
- Character tags for general use
- Tags used in title pages only
- Tags used in glossaries
- Tags used in appendices

Chapter Tags

Table 1.16 lists each tag in the FrameMaker paragraph catalog for chapter files, along with a brief description. Table 1.17 lists character formats.

Table 1.16
Paragraph Catalog

Tag Name	Purpose
1head	Use {1head} for major topics that can stand on their own.
1headtoc	Chapter table of contents created with 1head cross-references.
2head	Use {2head} to designate subtopics.
3head	Use {3head} to designate smaller independent subtopics within a subtopic.
4head	Use {4head} as the lowest topical subordination.
annotation	Use {annotation} to insert notes to yourself or reviewers.

Table 1.16 — Paragraph Catalog — (Page 1 of 4)

Tag Name	Purpose
body	Use {body} for plain content text.
bodykeep	Use {bodykeep} for plain content text when you want it to stay with the following paragraph. This is typically before lists.
bodysub1	Subordinate paragraph text (1/4-inch indent).
bodysub1keep	Subordinate paragraph text (1/4-inch indent) that stays with the following paragraph. Typically used before sublists.
bodysub2	Second-level subordinate paragraph text (1/2-inch indent).
callout C	Centered graphic callout.
callout L	Left-justified graphic callout.
callout R	Right-justified graphic callout.
cellcenter	Table cell centered.
cellhead	Table heading left.
cellheadcenter	Table heading centered.
cellheadright	Table heading right.
cellleft	Left-aligned text in a cell
celllefthang	Use to format indented command lines in tables (1/8-inch indent).
celllist	Bulleted list in a table cell.
cellright	Table cell right.
code	Monofont (Courier New), no indent, no space.
codein1	Monofont (Courier New), 1/4-inch indent, no space.
codein1sp	Monofont (Courier New), 1/4-inch indent, space above.
codein2	Monofont (Courier New), 1/2-inch indent, no space.
codein2sp	Monofont (Courier New), 1/2-inch indent, space above.
codein3	Monofont (Courier New), 3/4-inch indent, no space.
codein3sp	Monofont (Courier New), 3/4-inch indent, space above.
codein4	Monofont (Courier New), 1-inch indent, no space.
codein4sp	Monofont (Courier New), 1-inch indent, space above.
codein5	Monofont (Courier New), 1 1/4-inch indent, no space.
codein5sp	Monofont (Courier New), 1 1/4-inch indent, space above.
codein6	Monofont (Courier New), 1 1/2-inch indent, no space.
codein6sp	Monofont (Courier New), 1 1/2-inch indent, space above.

Table 1.16 — Paragraph Catalog — (Page 2 of 4)

Tag Name	Purpose
codesp	Monofont (Courier New) with 1/4-inch tabs for code listings. No indent, space above.
DropHead	Formatted like a 3head, but color is black. Used to create sections of collapsible text in HTML output.
equation	Use for formulas and equations.
example	Run-in heading for examples illustrating a business concept.
examplesub	Subordinate example (1/4-inch indent).
field	Required heading for online field help. Use to describe fields in user guide also. Followed by bodysub1.
figure	Autonumbered figure title for diagrams, graphics, and screen captures. Displays in the sidebar.
figureNoOutput	Same as figure but mapped to no output in HTML conversion.
footnote	Footnote format. Use only with tables.
glossbody	Format for glossary definitions.
glossitem	Format for glossary terms.
glosslist	Format for list that is part of a definition.
graphic	Anchor for an inserted graphic; no text. Follows {figure} .
graphicNoOutput	Anchor for an inserted graphic that should not be included in HTML output.
graphictable	Use to anchor graphics in table cells. Required for HTML conversion.
headerleft	For running document or chapter heads on left page.
headerright	For running heads on right page.
important	One of the set of run-in headers. Not as extreme as a warning, but more critical than a note.
importantsub	Subordinated version of important.
list	Automatically bulleted list.
listsub	Subordinate bulleted list text.
listsub2	Additional level of subordinate bulleted list text. Use for lists associated with substeps.
note	One of the set of run-in headers. This tag draws attention to special considerations that readers need to access while scanning the text.
notesub	Subordinate note (1/4-inch indent).

Table 1.16 — Paragraph Catalog — (Page 3 of 4)

Tag Name	Purpose
prompt	Use for computer output displayed in stepped procedures or for directory paths, file names, and so on when formatted as separate paragraphs (1/4-inch indent).
promptsub1	Use for computer output displayed in stepped procedures or for directory paths, file names, and so on when formatted as separate paragraphs (1/2-inch indent).
promptsub2	Use for computer output displayed in stepped procedures or for directory paths, file names, and so on when formatted as separate paragraphs (3/4-inch indent).
screen	Use to format character screens copied from character sessions so that they display in monotype font. Should be used only inside an anchored frame.
step	Use to continue an autonumbered sequence.
step1	Use to start a new autonumbered list.
substep	Use to continue a subordinate autonumbered sequence within a sequence (for example, Step 1, substep b).
substep1	Starts a subordinate autonumbered sequence within a sequence (for example, Step 1, substep a).
table	Autonumbered title for a table; displays in sidebar.
table_wide	Used to format table titles for extra-wide tables.
tablefooter	Format for footing in long tables that span multiple pages.
tableNoOutput	Table title to mapped out of HTML output.
tablespacer	Table anchor; follows {table} .
unit	Name for a unit (generally chapter title).
unitnumber	Chapter number used in autonumbered figures and tables.
warning	One of the set of run-in headers. Should be used sparingly for critical issues such as data loss.
xref	Formats cross-references displayed in the sidebar.
xxref	Cross-reference to be omitted in HTML output.

Table 1.16 — Paragraph Catalog — (Page 4 of 4)

Table 1.17
Character Catalog

Tag Name	Purpose
allcaps7.5	Use to format string in all capitals in table cells; typically a business object document (BOD) name.
allcaps8.5	Use to format a string in all capitals in body text; typically a BOD name.
bold	Formats bold, for use as needed.
dingbat	Character format for xref arrow character.
Emphasis	Use to italicize key terms when they are introduced and emphasize other text as needed.
fig	Character formatting used with autonumbers for sidebar elements such as figure and table.
link	Character format for preparing hyperlink areas; no visible effect in the printed document.
monofont	Formats Courier New As Is (same size as surrounding text). Use with tags under 11 pt to format references to interface elements such as directory paths and screen output.
monofont10	Formats Courier New 10 pt. Used with 11 pt tags to format references to interface elements.
pagenumber	Format for blue page number on master page.
run-in	Character format for lead-in tags such as note, example, warning, important.
run-in red	Character format for lead-in tag for annotations.
smallbullet	Small bullets in {cellist} tag format.
stepnumber	Character format for autonumbered steps and substeps.
strikethrough	Legal strikethrough format for indicating replaced text.
superscript	Character format for superscript in equations.
symbol	Seldom-used Symbol font.
unittoc	Character formatting for the {thead} table of contents inserted at the beginning of a chapter.
urlink	Format for links to Web pages (blue text). Typically applied to {bodysub} for a stand-alone link.
variable	Formats Courier New As Is with italics. Use with tags under 11 pt to format references to interface elements with user-supplied names.
variable10	Formats Courier New 10 pt with italics. Use with 11 pt tags to format references to interface elements with user-supplied names.

Title Page Tags

The other elements of a book have abbreviated tag sets that may only apply to a particular element. Table 1.18 lists the tags used in `ug_templateTITLE.fm`.

Tag Name	Purpose
copyright	Format for the copyright.
date	Format for the printed date.
graphic	Anchor for graphical elements.
itemnumber	Tag for the item number.
subtitle	Subject of book, such as Distribution.
title	Type of book and volume, such as Product User Guide Volume 1.
title-text	Plain content text.
titleTOC	List of chapters or major units in the book. Use active cross-references to create this list so that they are converted to links in HTML and PDF.
version	Product version.

Table 1.18
Title Page Tags

Table of Contents Tags

Most of the tags in `ug_templateTOC.fm` are automatically created by FrameMaker by appending TOC to the tags included in the table of contents setup. These include `{unit}`, `{unitnonumber}`, `{1head}`, `{2head}`, `{section}`, and `{apndxunit}`. This template also uses `{headerleft}`, `{headerright}`, and `{tocunit}` for the Contents heading.

Glossary Tags

Table 1.19 lists tags used in the glossary, other than standard `{headerleft}` and `{headerright}`.

Tag Name	Purpose
glossbody	Text format of the definition.
glosshead	Alphabetic letter separators in a long glossary.
glossitem	Format for the term being defined.
glosslist	Bulleted list within a definition.

Table 1.19
Glossary Tags

Tag Name	Purpose
unitnonumber	Chapter title without a number.
unitnumber	Chapter title with a number in <i>Volume 1: Introduction</i> .

Note The glossary in *User Guide Volume 1: Introduction* is a numbered chapter and uses `{unit}` and `{unitnumber}` tags. For glossaries in stand-alone books, `{unitnonumber}` is used.

Index Tags

Most of the tags in `ug_ix.fm` are generated and indicate the applicable index level and letter separator. The `{unitnonumber}` tag is used for the Index title.

Appendix Tags

The tags available for use in appendices are identical to those in the standard chapter template, with the following exceptions:

- `{apndxnumber}` is used in place of `{unitnumber}`.
- `{apndxunit}` is used in place of `{unit}`.

In addition, some seldom used table formats that are typically used in appendix reference material are included: `{celleftref}`, `{celleftin1}`, `{celleftin2}`, `{celleftin3}`, `{celleftin4}`.

Since appendix numbering follows an alphabetical format, the `{table}` and `{figure}` tags have been modified to use alphabetical numbering also.

Important To prevent numbering problems, do not import paragraph tags between chapter and appendix files.

HTML Considerations

This section discusses common document formatting errors that cause problems during conversion to HTML using WebWorks Publisher. Some of these practices would be acceptable if our only output were printed books. But because our output is used in multiple ways, the following rules must be strictly followed.

Table Formatting

- Ensure that tables have true heading rows.

The color formatting in HTML is applied to table rows based on their type. A row may look like a heading row in print, but if it is not a true heading row, the correct color is not applied in HTML.

- Do not use a table defined to have a heading row to create the effect of the Prompt table format.

If you are using a table that normally has a heading row and you remove the heading row, the table is converted in HTML with padded cells. The Prompt table is intended to look invisible, and is converted without cell lines. If the table defines a two-column list, for example, it looks bad in HTML with the cell padding.

- Do not use unauthorized paragraph tags in table cells.

This is especially common in blank table cells and in tables converted from Microsoft Word documents.

- Do not leave spaces in blank table cells.

Always verify that blank cells are free of spaces, especially in tables converted from Word.

- Do not use table shading to convey significant meaning.

Tables in HTML have their own design and shading applied based on the HTML design, which is independent of how the table is shaded in FrameMaker. Shading does not convert in WebWorks Publisher because it is not associated with a particular style. Shading is applied at the row and column level which does not have a style. You can however specify unique shading following a pattern per a table style with WebWorks Publisher's {AlternateShading} table style.

- Do not use footnotes in table headers.

Footnotes use special cascading style sheet (CSS) attributes to make numbers superscript. The text is black. WebWorks Publisher formats table headers to have dark blue shading, thus preventing footnote numbers from displaying appropriately. If a footnote applies to an entire column, put it on the first entry instead of the heading.

- Do not use the Table Sheet variable in table headers.

Unlike cross-references, variables are treated as hard-coded text in WebWorks Publisher. Since tables are not broken up by page breaks in HTML, a variable indicating a page range is not applicable. This variable in a table footer does not create problems because footers are conditionalized text in FrameMaker. Any row that has the condition `PrintOnly` in FrameMaker does not display in HTML.

Paragraph Formatting

- Use paragraph tags appropriately.

The WebWorks template does not always map tags exactly like the FrameMaker template. Similar tags may look quite different in HTML. For example, do not use the `{screen}` tag for code samples.

Note Use the `{screen}` tag only inside anchored frames.

- Do not type a period after run-in tags such as `{field}` and `{glossitem}`.

FrameMaker automatically suppresses the display of manually typed periods in any tag that includes a period in the tag definition. The only way to see the extra periods in FrameMaker is to use the Cross-Reference dialog and select `field` and `glossitem` as the paragraph tag to cross references. Each occurrence of the paragraph displays. If the field name is followed by a period, it means that an extra one has been typed and needs to be deleted. Otherwise, the HTML document displays two periods.

- Use every tag in a document to be used as an HTML template.

WebWorks expects all tags to be used in a document. If some tags in the FrameMaker catalog are unused, they are not included in the WebWorks conversion. If you are going to base a WebWorks template on this conversion, no mapping will exist for other documents that do use the tag.

Character Formatting

- Avoid formatting overrides.

An override occurs, for example, when you apply bold formatting using the toolbar or `Ctrl+B` rather than the **bold** character tag to format text as bold. In HTML, the resulting display is erratic, sometimes applying one format or the other.

- Apply only one character tag to the same text area.

This occurs, for example, when you create italicized Courier text by applying both the `monofont10` and *Emphasis* tags rather than using *variable10*. This causes problems during HTML conversion because only one of the tags can be mapped properly.

- Do not use small caps character formatting.
HTML does not support small caps and displays the letters as lowercase. Instead, use the `allcaps7.5` and `allcaps8.5` character tags.

Miscellaneous Formatting

- Do not use em and en dashes in Courier New (monofont) text
These display as non-printable characters in HTML.
- Do not use a manually inserted hyphen to break text across lines in the sidebars.
This introduces an extra space in the HTML.
- Do not including text in `{tablespacer}` and `{graphic}` paragraphs.
It is often hard to see this text in the source FrameMaker file since the font size is so small. However, it displays clearly in the HTML.
- Do not use any conditional text formats other than PrintOnly.
Note The PrintOnly condition in FrameMaker is acceptable only if it is used on the tablefooter row of a table spanning more than 2 pages.
- Use only the dingbat characters referenced in the template.
Currently, the arrow used to introduce cross-references in the sidebar and the check mark used in tables are the only dingbat characters authorized for use in our documentation. Check with the lead technical editor and online help and web coordinator before using any dingbat character other than these two.
- Avoid using tabs for formatting text.
Tab indentations are not preserved in HTML. Use the family of code tags for indented code listings.
- Do not include a hyphen in a book file name.
These are not converted correctly by WebWorks.
- Create separate graphics files for each graphic displayed in a Frame, even when you could use one several times.

In a document to be converted to HTML, do not use anchored frames to crop a single graphic and reuse it to display different areas in multiple figures. Instead create a separate graphic file for each displayed area by copying and renaming the file. WebWorks applies the same size constraints to each version of the graphic, resulting in distortions in the HTML output.

- Do not use spaces in any file names. This includes any book file names or graphic file names.

A space in a file name causes problems with UNIX scripts that the Web team uses for moving and managing files.



Section 1

Appendices

This section includes sample appendix templates.

Sample Appendix **61**

Sample Appendix

Use this template to create appendices when needed. Make sure that an appendix is really required for the material. Sometimes, appendices are used simply as a way of avoiding the task of integrating difficult topics.

This template is exactly the same as the chapter template with these exceptions:

- unitnumber has been replaced with apndxnumber.
- unit has been replaced with apndxunit.
- The variable running H/F 1 has been changed to look for apndxunit instead of unit.
- Numbering formats for the figure and table tags reference the appendix number.

Cross-Reference Formats

If you want to refer to your appendix in any standard chapters, you will need to import the cross references from this template. There are three cross-reference formats for the appendix.

Table A.1
Appendix Cross-
Reference Formats

Format Name	Looks Like...	Use With...
Appendix #	Appendix A	apndxnumber
Appendix #, “Title,”	Appendix A, “Sample Appendix,”	apndxunit
Appendix #, “Title,” on page #	Appendix A, “Sample Appendix,” on page 61	apndxunit

Table of Contents

When adding an appendix to a book, the table of contents must be adjusted. These changes have been made to the TOC template.

- The reference page for the TOC includes the appropriate formatting for the appendix chapters.
- The apndxunitTOC style has been created.

Also remember to set up the TOC in your book to include the appendix.

- 1 Generate your book with the appendix included.
- 2 Make the book file the active document.
- 3 Highlight the table of contents.
- 4 Choose File|Set Up File.
- 5 Double click on apndxunit in the list titled Don’t Include to move it to the list of styles to be included.

Sidebar Options

If the material in your appendix requires a wider format, you can turn off the sidebars.

- 1 Choose Format|Page Layout|Column Layout.
- 2 Uncheck Room for Side Heads.

Wide Tables

Appendices often have wide tables for reference information and may use some special table formats. The following table uses indented `{celleftin1}` through `{celleftin4}` tags and `{celleftref}`. The `{celleftref}` is used to be able to pick out fields in the first column to use as cross-references.

Table A.2 Operations Menu

Menu Sections	Menu Items	Options
Factory Dashboard Monitor		
Assembly		
	Assembly Order Workbench	Options Set Lines
	Assembly Order Monitor	Options Set Lines Options Set Refresh Rate
Packaging/ Shipping		
	Packaging Workbench	
	View/Rebuild Packages	
	Shipping Sequence Viewer	
	Shipping Workbench	
	Finalized Shipment Viewer	
Monitors/ Workbenches		
	Cust Order Version Monitor	
	WO Scheduling Monitor	
	Released WO Status Monitor	
	In-Transit Order Monitor	
	Cust Order Version Workbench	Options Cust Order Version Monitor Options CO Version Detail Options View PFO List Versions Options View WO List Versions Options Manual COV Entry Options COV Version Detail Options Copy Customer Order Version Options Delete Cust Order Version

Glossary

A

ABC Class. An inventory classification and ranking system based on the annual dollar usage of the inventory. Three classes are used: A, B, and C. Class A items have the highest annual usage and receive the most attention. Class B items have lower annual usage and are controlled using reorder point. Class C items have the lowest annual usage. Inventory value is determined by annual usage, unit cost, lead time, space available for storage, and quality.

Absorbed Tax. A sales tax not passed on to the customer.

Abstract Class. A class with no instances. Abstract classes organize a class hierarchy or define methods and variables for subclasses. Also called virtual class.

B

Backflush. (1) The automatic recording of component/raw material issues based on (a) the quantity of end items received and (b) the quantity per of the component from the end items bill of material. Can be used for both work order and repetitive production. (2) Calculates the quantity completed for the base process using Work Order Receipt Backflush

(16.12). The backflush quantity for the base process is used to calculate the issue (backflush) quantities for the co-products and by-products.

Buyer. The individual responsible for purchasing. Buyer duties include vendor selection, negotiation, order placement, and follow-up as well as evaluation of new materials or processes, evaluation of vendor performance, and value analyses.

By-product. A product that is an incidental result of a process and usually has little sales value. Recyclable products and waste products are types of by-products.

C

Calendar Days. All days of the year. Calendar days include both workdays and non-workdays. Calendar days are usually used to schedule purchase order due dates.

Call. Any type of contact that generates a service response, ranging from a phone call from a customer. For example, a service visit or a call by a field technician.

Call Activity Recording (CAR). The process of recording actual time, materials, and expenses consumed in handling a call.

Column Type. An attribute of a column in a group. Values for column types are:

- **Actual.** Actual posted amounts are included in the column.
- **Budget.** Budgeted amounts are included in the column. (A budget code is specified to indicate the budget for extraction.)
- **Calculation.** The column is a function of columns.

Common Business Practice. A common practice or procedure that the business community subscribes to.

D

Data File. A collection of related data records organized in a specific manner in a computer system.

Data Folder. A business UI component that displays the fields the user will edit or view. The fields exist in the application's primary table; that is, the table with the fields the application requires to perform its business function.

Data Item. The smallest element of data in a database.

Data Record. A collection of related data items.

Dynamic Unpeg. The process in which peg quantities are unpegged from unconfirmed shippers and pegged to ship lines on newly created shippers for the same order line number.

E

ECCN. Export Control Classification Number.

Economic Order Quantity (EOQ). A demand rate calculation used to balance total inventory costs against order costs. The EOQ is a type of fixed order quantity that may be used to

determine the optimal amount of an item to be purchased or manufactured at one time. The purpose of the calculation is to minimize the combined costs of acquiring and carrying inventory.

External Warehouse. A customer warehouse where stock is stored.

F

Fab Auth Days. Fabrication Authorization Days. The time period or authorization horizon during which the customer authorizes a supplier to fabricate items.

Fab Qty. Fabrication Quantity. The maximum quantity of this item that the customer authorizes you to produce in anticipation of the customer's scheduled demand.

Free on Board (FOB). Identifies when title passes from the seller to the buyer and who pays shipping.

Full Pegging. Refers to the ability of a system to automatically trace requirements for a given component all the way up to its ultimate end item, customer, or contract number.

G

Gateway Program. A connecting computer link that translates between two different kinds of computer networks.

GATT. General Agreement on Tariffs and Trade.

General Allocation. The needed quantity of an item is reserved from the available inventory at a specific site. Ensures that the quantity of inventory required by the order is available. Does not reserve specific items of inventory.

GGTM. Global Tax Management.

H

Handle. The internal pointer of a component. Messaging between components uses handles to find the component that is to perform a procedure.

Header. The header identifies the specification by name, type, category and sub-category, system ID, and unique ID. It also identifies the business unit responsible for the specification.

Header Application. The main application; it maintains the master table, which holds the specifications for the application's components. It is the application that first instantiates when an OBCM application runs.

HIN. Health Industry Number.

I

Implementation. The integration of a system into day-to-day operations. The system implemented may be manual or computerized.

Implementation Standard. A set of programming guidelines that describes the correct use of general purpose programs provided for an area of functionality.

J

Job. A sales order that is directly produced by the shop. A job may include one or more work orders. The sales/job number is used to group costs.

Job Order Costing. A costing system where costs are charged to specific sales/job numbers. This system can be used with either actual or standard costs in the manufacture of discrete items or product lots.

K

Kanban. A Japanese method of production and inventory control first developed and used at Toyota. Designed for the day-to-day on-floor control of production and inventory, it relies on a series of control triggers, typically in the form of cards. Kanban is the predecessor of Just in Time.

L

Labor. (1) The direct cost associated with labor. (2) The physical work performed.

Labor Burden. The overhead cost associated with labor. Usually stated as a percent of the direct labor amount or as a cost per direct labor hour.

Labor Cost. The dollar amount of added value due to labor performed during manufacturing.

Labor Rate Variance. The difference between the reported work center labor rate and the payroll labor rate for that employee.

Lower Level Costs. The cost category representing a cost added at prior stages of manufacturing. Lower-level material costs are the cost of all purchased materials used in the final product and any subassemblies. Lower-level labor, burden, and subcontract are developed from the cost of making any lower-level subassemblies.

M

Machine Burden. The overhead cost based on the number of hours a machine is in use—both while it is being set up and while products are being run.

Maintenance Contract. A contract that includes a number of scheduled visits by an engineer not to fix broken equipment but to ensure that it remains in good working order.

Multiple Time Zones. An optional feature of SSM that enable the system to present call dates and times from the point of view of a call's end user. This allows users in diverse geographical locations to view times relative to their own time zones.

N

N-Tier Architecture. Applications can be distributed across multiple systems. A three-tier architecture is one in which user interface components are on a user's client machine, the business components are on an application server, and the database is on a separate data server.

NAFTA. North American Free Trade Agreement.

NDC. National Drug Code.

Need Date. The date items must be available for shipping or for issuing to manufacturing. The due date plus inspection lead time (if any) should equal the need date.

Net Change MRP. Replans those items that have had changes in supply or demand since the last MRP run.

O

OBCM. Acronym for Object-Based Component Model; a model-based development environment for building and running object-based components and applications.

Overissue. Removal from stock and assignment to a schedule of a quantity higher than the schedule quantity.

P

Packing Slip. A document included with a shipment that itemizes and details the contents.

Pallet. A portable platform used to store and transport inventory. Some companies group items by pallet for operations planning.

Proximo Terms. A special type of credit term used in France and some other countries. Allows you to manage due dates so processing occurs once a week, once a fortnight, or monthly.

Push System. Replenishment or production of items or materials in response to a given schedule or order from a centralized authority, or warehouse.

Q

Quality Order. A document authorizing a test or inspection. It specifies four things about an item: how much will be tested, where, when, and by what procedure.

Quotation. A statement of price, terms of sale, and description of goods or services offered by a vendor to a prospective purchaser. When given in response to an inquiry, it is usually considered an offer to sell.

R

Rate Variance. The difference between the actual output rate of product and planned or standard.

RVC. Regional Value Code.

S

Safety Lead Time. The time added to normal lead time for the purpose of completing an order in advance of its need date.

Scrap Account. A general ledger account charged when items or products are scrapped.

Screen. A means of accessing a program where you can add, delete, view, or modify data.

System-Level Items. Typically an item that is the parent or top-level item in a configured product structure. However, you can use this attribute in any way that is meaningful to your organization.

T

Tare Weight. The weight of just the containers. Does not include the weight of its contents.

Target Dataset. Number Range Management (NRM) sequences are associated with dataset identifiers. These are called the *Target Dataset* for the sequence. The target dataset can indicate who owns the sequence, or where its sequence numbers will be used. A sequence owner can be a process, a document, or some other entity that the client can recognize. For example, the target dataset may be the name of the principal database field where numbers from the sequence will be used.

Trial Daybook Report. Lists individual entries for a specified daybook or range of daybooks. A trial report displays all data specified in the selection criteria, but it does not update page and entry numbers.

U

Unapplied Payments. Payments such as deposits and prepayments that do not apply to specific customer invoices, memos, or finance charges.

Utilization. A measure of how intensively a resource is being used. Utilization equals the direct time charged divided by the clock time scheduled.

V

Value. The element information entered for this category. This value may be an authorization number, a contact name, or packaging information.

W

Wait Time. The time a work order must wait after it has been worked on, but before it is moved to the next operation. For example, drying, curing, cooling.

Warehouse System. Computer application used in external warehouse that exchanges data with the database through the Warehousing Interface, as well as interface processing of its own.

Workstation. Assigned location where a worker performs the job, such as a machine or workbench.

X

Y

Yield. Ratio of usable output from a process to its input.

Yield %. Yield Percentage. Percentage of acceptable quality of a manufacturing order.

Z

Zero Inventories. A philosophy of manufacturing based on planned elimination of all waste and consistent improvement of productivity. The goals of zero inventories are to:

- Have only the required inventory, when it is needed
- Improve quality to zero defects
- Reduce lead times by reducing setup times, queue lengths, and lot sizes
- Streamline operations to achieve these goals at minimum cost

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