



Chapter 8

Styles and Conventions

The use of consistent styles and conventions does much to enhance the professional look and feel of quality documentation. This chapter covers the following topics:

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Introduction

Many valuable resources covering the details of English usage and stylistic conventions exist for writers. This chapter is not intended to reproduce those resources or to teach you how to write. Generally, topics are covered here for one of these reasons:

- They have some particular application to company documentation.
- They express the preferred choice when there may be more than one correct way to do something.
- They indicate common errors to be avoided.

Style References

The following books are excellent references:

Clear Technical Writing by John A. Brogan (McGraw-Hill, Inc., 1973).

Pocket Pal, 14th edition, International Paper Company, 1989.

The Chicago Manual of Style, 14th edition, University of Chicago Press, 1993.

The Elements of Style by William Strunk, Jr., and E. B. White (Macmillan Publishing Co., Inc., 1979). (An online version is available at <http://www.bartleby.com/141>.)

Manual of Style for Technical Publications, Microsoft Press, 1995.

Read Me First! A Style Guide for the Computer Industry, Sun Technical Publications, 1996.

Online versions of *Manual of Style for Technical Publications* and *Read Me First! A Style Guide for the Computer Industry* are also available in:

`publish\libtools\Reference Style Guides`

Note Alternate stylistic conventions are frequently suggested for formal and informal writing. In general, choose the formal suggestion for technical writing assignments.

Term References

For information related to spelling, hyphenation, word use, and so on, refer to *Merriam-Webster's Collegiate Dictionary*, Tenth edition. For definitions of APICS terms, see the *APICS Dictionary*.

Note For spelling and formatting conventions for technical terms, refer to Chapter 11, “Hyphenation and Word Usage,” on page 253 or the Microsoft’s style guide rather than this dictionary. If you are unsure of which conventions to use with a particular technical term, consult the lead technical editor.

For explanations of technical terms and acronyms, see:

<http://whatis.techtarget.com>

For explanations of technical terms and acronyms that pertain to the Java programming language, see:

<http://java.sun.com/docs/glossary.html>

Book Element Style and Format

The usability of information is closely tied to its predictability. Consistent element formatting is a key component in creating a predictable environment for the reader. The following elements are discussed alphabetically in this section:

- “Abbreviations and Acronyms” on page 182
- “Cross-References” on page 182
- “Captions” on page 183
- “Equations” on page 184
- “Headings” on page 184
- “Lists” on page 185
- “Run-In Headings” on page 186

Chapter 10,
“Acronyms,” lists
common
software related
acronyms.

Abbreviations and Acronyms

Use abbreviations and acronyms as little as possible. Unless an abbreviation or acronym is well known, only use it when the term or phrase to which it corresponds is used more than two or three times in a document. Trademarked terms should not be abbreviated.

Always spell out the full term or phrase the first time it is used in a chapter. Follow the term with its corresponding abbreviation or acronym in parentheses. Words in the term should only be capitalized if they are proper nouns.

To form the plural of an acronym, use a lowercase *s* if there are no periods; add an apostrophe *s* if there are periods. For example, URLs and Ph.D.’s are correct.

In general, periods are not included in acronyms.

Avoid Latin abbreviations and terms such as e.g., i.e., and via. Readers are often confused about what they actually mean. Some Latin terms such as versus and vice versa can be used occasionally as long as you do so sparingly and with discretion.

The proper format for time references is AM and PM.

Abbreviate *United States of America* as US. Do not use U.S., USA, or U.S.A.

Note Please submit new acronyms to the lead technical editor as projects introduce them.

Cross-References

Cross-references serve two broad purposes: they refer readers to additional material of use or interest and they serve as additional access or entry points to a body of information. Cross-references are a wonderful navigation tool in online documentation, and you should make every effort to use them.

- All references to other document elements should be made using the automatic cross-reference features of FrameMaker. This includes references to tables, figures, other headings, or chapters.

- Never manually edit a cross-reference. They are maintained by the system, and editing them destroys their integrity.
- The lead-in for a cross-reference should be *See*.
- Cross-volume references are entered manually using the following format:

See User Guide Volume 3: Master Data.

See User Guide: Desktop Interface.

Note When cross-referencing a user guide from a book that covers multiple versions of the software, such as an external interface guide, do not use a volume number, since these may change between releases. The format would be:

See User Guide: Master Data.

Captions

Captions are used for both figures and tables.

- Try to keep each caption within a document unique; captions should communicate something specific about the figure. For example, Picklist Processing Flow is more descriptive than Work Flow.
- Screen capture captions should generally include the menu number as in the following example:

Figure 1.2
Call Maintenance (11.1.1.1)

- When a chapter contains a consecutive series of screen captures for one program, each screen capture caption should include the program name and frame name, separated with a comma. In this case, only include the menu number in the first capture in a sequence; you do not need to repeat it.

Figure 1.3
Call Maintenance, End User Selection Frame

- Use standard title capitalization rules for captions. Do not capitalize articles, coordinating conjunctions, and prepositions with fewer than five letters, unless they begin or end the caption.
- Avoid starting captions with articles; for example, use *Page Layout* rather than *The Page Layout*.

- Avoid starting captions with words that can be multiple parts of speech. For example, in the title *Processing Flow*, *Processing* could be an adjective indicating a type of *Flow* or a verb indicating something that is done to *Flow*.

Equations

Table 8.1 lists common operators used in equations.

Table 8.1
Equation Operators

Operation	Use	Comment
Addition	+	
Subtraction	en dash (–)	If the equation uses the Courier New font, do not use the en dash since this causes problems in HTML; simply use a hyphen.
Multiplication	*	Do not use x.
Division	/	Do not use the division sign.

Headings

Headings are summary statements for readers; they encompass more than titles. The breadth of each summary statement should match its heading level; that is, heading 1 summarizes a broader subject than heading 2.

As much as possible, headings should be used in order—heading 1, then heading 2, then heading 3. Avoid skipping levels.

Make each heading in a document unique. Include content words in headings for specificity; for example: *Introduction to Items/Sites* rather than *Introduction*.

In all cases, try to limit headings to one line.

Use verb forms when possible; they frequently carry more information than nouns alone. For example, phrases such as *Importing Schedule Data into the Database* carry more information than *Import Program Use*.

Use parallel construction for headings at each level. For example, *Setting Up MRP* should be followed by *Executing MRP* rather than *MRP Execution*.

Avoid starting headings with articles; for example, use *Page Layout* rather than *The Page Layout*. Also, avoid starting headings with words that can be multiple parts of speech. In *Processing Flow*, it is not clear whether *Processing* is an adjective or a verb; *Processing* could be a type of *Flow* or something that is done to *Flow*.

Headings follow standard outline structure. There should be at least two headings for each level that you use.

Lists

There are two basic types of lists: numbered and unnumbered. Each type is appropriate in different situations.

For more information, see “Lists” on page 77.

Try to create consistent lists by not mixing complete sentences with sentence fragments. If such a mixture is unavoidable, punctuate each item as a sentence.

- Capitalize the first word of each item.
- Make sure all items in a list use parallel construction.
- End sentences with appropriate punctuation.
- Do not punctuate the end of sentence fragments unless they are in a list with a mix of complete sentences and sentence fragments.
- Try to limit numbered procedures to less than nine steps. This is according to the $7 + \text{or} - 2$ rule for how humans learn and retain information.
- Bulleted lists need at least two bullets. Stepped procedures need at least two steps. If you need to set a single paragraph of text apart, use the `bodysub1` tag.

Numbered Lists

Avoid using substeps within numbered lists unless there is a strong requirement for them. Overuse can fragment a procedure and confuse the reader.

Numbered lists are most often associated with procedures, processes, and other prescriptive text. Most people cannot remember more than seven steps or levels. This is known as the *7 plus or minus 2 rule*, and should be kept in mind when writing stepped procedures. If a procedure extends beyond this, consider breaking it into more than one procedure.

Tables and Lists

See “Graphics, Diagrams, Screen Captures” on page 79.

Use untitled tables (Prompt table style) like the following to create lists of field values for user entry.

End User Type:	blank
Prod Line:	w-10
Duration:	90

When you have a long list of short items, you can create a multiple-column list using a table. Use the Prompt table format without any table caption or headings. Use the list style within the table cells.

- | | |
|----------|----------|
| • Item 1 | • Item 4 |
| • Item 2 | • Item 5 |
| • Item 3 | • Item 6 |

Run-In Headings

See “Tags for Highlighting Text” on page 91 for details.

A number of paragraph tags are provided that include run-in headers: example, examplesub, note, notesub, important, and warning. Be careful to use these tags appropriately and not overuse them.

Punctuation

The following sections include miscellaneous information related to punctuation.

Apostrophes

To form the plural of an acronym, use a lowercase *s* if there are no periods; add an apostrophe *s* if there are periods. For example, BOMs and Ph.D.’s are both correct.

Commas

Commas add clarity by inserting short pauses in the flow of words. When using commas, keep in mind the specific grammar rules that govern their use.

Use a comma to separate elements in a series. Using a comma before between-item conjunctions in a series clearly distinguishes them from any within-item conjunctions.

Single-item series: A, B, C, and D

Compound-item series: A and B, C and D, and E and F

Mixed-item series: A, B and C, D, and E

Use commas between independent clauses joined by a coordinating conjunction such as *and*, *but*, *or*, *nor*, *yet*. This combination signals a softer stop than a period or semicolon.

Use a comma to separate introductory words, prepositional phrases, or clauses from the main body of a sentence.

Use commas to set off parenthetical material. This approach is easier to read than parentheses.

Use a comma to separate elements of a date when all three are present and two numerical elements are adjacent. When a date in this format is not at the end of a sentence, insert another comma after the year.

January 3, 1995

The comma is not necessary when only two elements of a date are present or when the numerical elements are separated.

January 1995 or 10 January 1995.

Do not use commas in four-digit numbers such as 1000; do use commas in numbers that have more than four digits.

Dashes

Always use en or em dashes rather than hyphens. Since our materials are translated, we must take care to use dashes infrequently and in only the most unambiguous ways. Table 8.2 shows some of the standard uses of the dash.

Table 8.2
Using Dashes

Dash	Use	Example
Em	Setting off an explanatory phrase within a sentence	We are talking parenthetically—in asides—not hypothetically, alphabetically, or theoretically.
	Setting off a series punctuated by commas	The standard refrain—Yeah, yeah, yeah—filled the arena and rattled the rafters. (No spaces around em dashes.)
En	Indicating the arithmetic operation minus	1492 – 1215 = 277 (Spaces around the en dash)
	Indicating a range between limits	1939–45
	In software menu names	Issues–Unplanned

In online help, use a floating hyphen (space on either side) in menu labels that use an en dash with no spaces when referenced in FrameMaker documents; for example, Issues - Unplanned.

Table 8.3 shows how to create dashes in FrameMaker, PowerPoint, or Microsoft Word for Windows.

Table 8.3
Creating Dashes

Dash	FrameMaker	Word and PowerPoint
Em	Ctrl+q Shift+Q	Alt+Ctrl+minus sign (on the numeric keypad)
En	Ctrl+q Shift+P	Ctrl+minus sign (on the numeric keypad)

Tip
Paragraph and character tags that use Courier New include the prompt and code paragraph tags and monofont character tags.

Important Do not use en or em dashes in any text formatted with the Courier New font, since they do not display correctly when converted to HTML. Always use hyphens rather than dashes in Courier New text, as in the following examples:

```
Open cursor error, please increase -c (1445)
```

```
In the Start Params field, change the default open cursors parameter from -c 30 to -c 50.
```

Exclamation Points

Avoid using exclamation points in technical documentation.

Hyphens

Use hyphens with some prefixes when necessary to prevent a word from being mispronounced or mistaken for another word. For additional information on this type of hyphen usage, see Chapter 11, “Hyphenation and Word Usage,” on page 253.

When several words are used together to modify another word, they are referred to collectively as a *compound modifier*. Hyphenate a compound modifier when it occurs before the word it modifies. Do not hyphenate it when it occurs afterwards.

Incorrect: This overview helps you understand topics at a high-level.

Correct: This is a high-level overview.

Incorrect: Use this report to determine whether any amounts are out-of-tolerance.

Correct: Use this report to review out-of-tolerance amounts.

Do not hyphenate compound modifiers when the first word ends in *-ly*.

Incorrect: This is a fully-integrated solution.

Correct: This is a fully integrated solution.

Avoid hyphenating most software-specific terms even when they are technically behaving as compound modifiers.

Incorrect: Enter information in the sales-order header.

Correct: Enter information in the sales order header.

Incorrect: Process the general-ledger updates.

Correct: Process the general ledger updates.

A hyphenated word will break at the end of a line. Use nonbreaking hyphens to prevent this when the first part of a word cannot stand by itself. For example, recreate should not break at the end of a line but over-shipment can.

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

Quotation Marks

- Never use quotation marks to set apart words. You can use the Emphasis character tag to highlight new terms the first time they are used. If you are using a word in a nonstandard fashion, perhaps a more appropriate word is needed.

Incorrect: EMT creates allocations in a “dummy” location.

Correct: EMT creates allocations in a location that represents the secondary business unit.

- Do not use quotation marks to set off user entries or technical terms. Programmers like to use this format, and you often are given source material containing quotation marks. Use the Emphasis character style to set apart terms.
- Place periods or commas inside quotation marks.
Wrong: The warning is, “Be careful out there”.
Right: The warning is, “Be careful out there.”

Parentheses

- Avoid the use of parenthetical expressions. Readers come to expect that items in parentheses represent menu numbers, since this is a software interface convention. Incorporate parenthetical information into the text or use some other method of setting it apart, such as a tip.
- Do not represent both the singular and plural form of a word by using (s) as in the following example:

To create the file(s)...

Simply use the plural form of the word, since the singular form can be considered a subset of the plural.

Semicolons

You should generally avoid using semicolons in technical writing. Rather, related independent clauses should be formatted as two separate sentences. This helps keep sentences clear and concise, supporting both readability and translatability.

You should use a semicolon to separate items in a series that is internally punctuated with commas, as in the following example:

Their vacation plans included travel to San Diego, California; Santa Fe, New Mexico; and Phoenix, Arizona.

We allow use of a semicolon before such expressions as *that is* and *for example*, but only when these expressions introduce a statement that is not a complete clause containing a subject and predicate.

Incorrect: The system searches for files in subdirectories that are named for sites with a prefix of mcp-. For example, mcp-10000.

Correct: The system searches for files in subdirectories that are named for sites with a prefix of mcp-; for example, mcp-10000.

When examples introduced with this type of construction become lengthy, you should format them as complete sentences rather than using semicolons.

Incorrect: Optionally enter the file name of a custom script to be run after a group of documents is created; for example, a script that invokes an e-mail program to transmit exported documents.

Correct: Optionally enter the file name of a custom script to be run after a group of documents is created. For example, this may be a script that invokes an e-mail program to transmit exported documents.

Slashes

Avoid using slashes to indicate two alternatives. They create ambiguous word combinations that are open to interpretation and difficult to translate. Instead of using a slash, spell out the meaning; for example, lot/serial numbers should be written as lot numbers and serial numbers.

Slashes are appropriate only when they are part of the product name or interface; for example, Items/Sites.

Other Formatting Rules

Forced Returns

Do not use forced returns for formatting, except:

Tip
Create a forced return by pressing Shift+Return.

- In the three tags that require them: tips, table captions, and figure captions
- In table cells or code listings where formatting should be preserved in different delivery environments
- To prevent product names with slashes from breaking at the end of a line

To preserve required spacing in FrameMaker documents, learn the keystrokes for nonbreaking spaces and hyphens.

Table 8.4
Nonbreaking
Characters

To insert this	Do this
Nonbreaking space	Ctrl+Space
Nonbreaking hyphen	Escape hyphen h

It is especially important to avoid forced returns in headings. They display in the table of contents, forcing entries to two lines. They also cause problems in documents converted to HTML.

Smart Quotes

Watch out for straight quotes (") and apostrophes when you are converting text from other applications to FrameMaker. If you import text from another application that does not support smart quotes (“ ”) or has smart quotes turned off, FrameMaker replaces the quotation marks in the imported text with straight quotes rather than smart quotes. You must manually search for straight quotes and replace them yourself.

Note You cannot use FrameMaker’s find feature to automatically search for or replace straight quotes and apostrophes. Similarly, enabling the Straight Quotes option in the FrameMaker spelling checker does not guarantee that the spelling checker will find imported straight quotes.

Numbers

In general, spell out cardinal numbers zero through nine. Use numerals for numbers 10 and above. However, when writing about user input for fields, numbers should be written as they appear in the interface.

Incorrect: Enter one to select a customer planning schedule or two to select a customer shipping schedule.

Correct: Enter 1 to select a customer planning schedule or 2 to select a customer shipping schedule.

Spell out the number zero when there is a possibility of confusing the numeral by itself with another character such as a capital *O*.

Incorrect: If you enter 0, the system does not allocate inventory.

Correct: If you enter 0 (zero), the system does not allocate inventory.

Do not spell out zero when it appears in a list with other numbers or in other cases where there is no risk of confusing it with a different character.

Incorrect: Valid values are 0 (zero), 1, or 2.

Correct: Valid values are 0, 1, or 2.

Always use numerals when expressing percentages, dates and times, equations, and units of measure such as inches, grams, or bits.

Incorrect: The system calculates the variance percentage as follows: two divided by two-hundred = .01, or one percent. This report requires approximately five MB of memory to run.

Correct: The system calculates the variance percentage as follows: $2/200 = .01$, or 1%. This report requires approximately 5 MB of memory to run.

When a sentence contains two or more numbers that are not units of measure, and at least one number is greater than 10, use numerals for all. Otherwise, spell out each number.

Incorrect: Customer A purchases five cases of item C while customer B purchases 16 cases.

Correct: Customer A purchases 5 cases of item C while customer B purchases 16 cases.

Spell out ordinal numbers (first, second, and so on) unless doing so would require more than one word, as in 21st or 53rd. Try to avoid using large ordinal numbers whenever possible.

Incorrect: When you scroll down to the bottom of the window, the client displays the 2nd set of records, starting with the 51st record.

Correct: When you scroll down to the bottom of the window, the client displays the second set of records, starting with record 51.

Always use cardinal numbers rather than ordinal numbers in dates.

Incorrect: Item A is shipped from site 1000 on March 10th.

Correct: Item A is shipped from site 1000 on March 10.

Capitalization

Capitalize most software module names even when they are also standard APICS terms. This includes Material Requirements Planning and Distribution Requirements Planning.

Incorrect: Material requirements planning (MRP) considers confirmed sales orders as sources of demand.

Correct: Material Requirements Planning (MRP) considers confirmed sales orders as sources of demand.

An exception to this rule is the term *general ledger*, which is not capitalized unless you are referring specifically to the product's General Ledger module.

Incorrect: This program generates General Ledger (GL) transactions.

Correct: This program generates general ledger (GL) transactions.

Capitalize general ledger account names, but do not capitalize the word account.

Incorrect: The system updates the Transfer Variance Account.

Correct: The system updates the Transfer Variance account.

Do not capitalize references to database tables.

Incorrect: The system stores item data in the Item Master table.

Correct: The system stores item data in the item master table.

The term *service pack* is lower case unless it is part of a title of a CD or is a specific title itself:

Correct: To install Service Pack 1, place the CD-ROM in a drive.

Correct: The service pack files are copied to the directory you specify.

Times

Use the following conventions when referring to time:

11 AM

4 PM

3:15 PM

Units of Measure

In general, avoid abbreviating units of measure except for the following:

- kilobytes (K)
- megabytes (MB)
- gigabytes (GB)

When indicating a unit quantity, include a space between the number and unit of measure. When the combination of number and unit of measure is used as a compound adjective and directly precedes the modified noun, use a hyphen instead of a space.

Incorrect: A 3.5 inch disk

Correct: A 3.5-inch disk

Note The exception to this rule is the abbreviation for kilobytes, K, which directly follows the number it modifies with no intervening space.

Incorrect: 128 K of memory

Correct: 128K of memory

Gender References

Avoid creating sentences that require a he or she pronoun. Never use he/she or, even worse, s/he. Most such references can be avoided by writing in the plural.

Wrong: The system administrator should configure his or her computer for the installation.

Right: System administrators should configure their computers for the installation.

Important Try to avoid creating disagreement between subjects and their modifiers. For example, do not write “The system administrator changed their mind.”

Symbols

Table 8.5 lists symbols you may need to use and how to insert them.

Table 8.5
Symbols

To insert this	Do this
Copyright (©)	Control+q, shift+0
Registered (®)	Control+q, shift+9
Trademark (™)	Control+q, shift+8

Alphabetizing

To alphabetize lists that contain phrases rather than single words, use the word-by-word system. This system is explained in detail in the *Chicago Manual of Style*. A brief explanation of the two modes follows.

Word-by-word. Alphabetization is interrupted at the end of the first word. Hyphens, slashes, and apostrophes are treated as continuing the single word.

Letter-by-letter. Alphabetization continues across spaces between words.

This rule has a significant effect on the order of entries in a glossary, for example. Table 8.6 illustrates the two methods.

Table 8.6
Sample
Alphabetized
Phrases

Letter by Letter	Word by Word
newborn	New Deal
New Deal	new math
new-fashioned	newborn
new math	new-fashioned
newt	newt

Writing About Software

Some of the writing issues you face are related to the kind of products we document. This section contains information useful in writing about company software products.

Describing Interface Actions

This section lists some generic conventions to use when writing about navigation activities in the software UI. Some of these conventions are adapted from *The Microsoft Manual of Style for Technical Publications*. For topics not covered here, refer to the online version of *The Microsoft Manual of Style* located in:

```
publish\libtools\Reference Style
Guides\microsoft_style_guide.hlp
```

Important Be careful when adapting standards from *The Microsoft Manual of Style* or other recommended style guides; not all standards apply to our documentation. If you are unsure about whether to use a particular convention, always check with the lead technical editor before proceeding.

General Conventions

Use *enter* to indicate the act of manually typing a value in a field or text box, or populating a field for which you can either manually enter a value or choose one from a list. In general, do not use *type* to describe the act of entering values.

You should use *enter* only to describe the act of inserting a code or identifier in a field or text box. When you tell the user to reference an object or type of record without specifically saying which code or identifier to use, use the more generic *specify*.

Incorrect: Enter an item in the field.

Correct: Enter an item number in the field. *or* Specify an item in the field.

Use *log in* to describe the act of accessing an application, as in “Log in to the database.”

Use *log on*:

- To describe the act of connecting to a network
- To describe the act of starting Windows
- In a UNIX-specific context, as in the following example:

To copy the files from the installation CD to the UNIX host, you must first log on as the root user ID.

Hyphenate log in and log on when using them as adjectives or nouns.

Incorrect: login ID, logon ID, during login

Correct: log-in ID, log-on ID, during log-in

Use *press* to indicate the act of entering a command from the keyboard.

Example Press Tab to access the next field and enter a value. Then press Go to proceed to the next frame.

Capitalize references to command keys. Use a plus sign (+) with no spaces between command names when writing out key combinations such as Ctrl+Alt.

Table 8.7 lists command keys that should be referred to by their associated abbreviations. Do not abbreviate other command key names not listed in this table, such as Enter or Spacebar.

Table 8.7
Command Key
Abbreviations

Command Key Name	Abbreviation
Alternate	Alt
Control	Ctrl
Escape	Esc

Formatting Conventions

Format references to the following interface elements with a monospace font—either the monofont10 or monofont character tags or the prompt paragraph tag:

- Directory paths
- File and program names
- File extensions, such as .pdf
- Database names, such as mfgdemo, mfgtrain, and mfgadmin
- Screen output, including system-generated prompts and messages
- Commands or parameters
- User names, such as user mfg under group tech

Important Do not use any special formatting conventions for field names (so_nbr) or table names (so_mstr).

Note More formatted is used in the installation guides than in the user guides, since it improved the reader’s ability to identify the key information they need to input into screens and prompts.

Here are some guidelines to follow when formatting interface elements in text:

- When the surrounding text is 11 pt, use the monofont10 character tag.
- In tables and sidebars, where the size difference between Courier New and Times New Roman is less pronounced, use the monofont character tag.
- Make sure that the spaces preceding and following the interface element do not have character formatting applied. This prevents leaving large gaps in text lines.
- In a table where interface elements are referenced in a separate column, you generally do not need to apply special formatting to them. However, when interface elements are integrated into standard text in cells, use the monofont tag. Table 8.8 provides an example.

Prompt	Description
Path of 90	This prompt is required. Enter the path to your target version installation directory; for example, <code>InstallDir</code> .
Startup script	This prompt is required. Enter the name of the startup script used to begin MFG/CONV against the source version database; for example, <code>connect</code> .
Path of dump dir	This prompt is required. Enter the path to your conversion dump directory; for example, <code>/mfg74/dump</code> .
Source database name	This prompt is required. Enter the name of your source version database; for example, <code>mfg74.db</code> .

Table 8.8
General Prompts

In Table 8.8, the system-generated prompts in the left column do not use special formatting. However, the directory paths and database file names in the right column use the monofont character tag to set them apart from the other text in the cell.

- Use the prompt paragraph tag to format an interface element as a separate, indented paragraph. This is especially useful for long directory paths, since the prompt tag uses a smaller font size than the monofont10 character tag.

- When applying special formatting, be careful that it does not defeat its purpose and make the surrounding text more difficult to read. For example, in a table that consists mainly of file names, you may not want to use any special formatting.

Windows-Specific Conventions

The remainder of the terms and conventions in this section should be used only when describing navigation activities in Windows-based environments. Use these conventions when referring specifically to the Windows and Desktop interfaces or when describing Windows-specific installation steps in an installation guide.

Note In the standard user guides, refer to commands using generic, interface-free terms, since instructions must apply to all product interfaces.

Use *click* to indicate the act of choosing or selecting a command button in a window, dialog box, prompt, or pop-up. Do not use click on or click at; click in the window is acceptable, however.

Example In the Welcome window, click Next to continue.

Use *choose* to refer the act of selecting an item from a menu.

Example Choose Tool Bar from the Options drop-down menu.

Use *drop-down menu* in preference to pull-down menu. However, do not use drop down as a verb.

Incorrect: Drop down the Edit menu and choose copy.

Correct: Open the Edit menu and choose copy. *Or*, choose Edit|Copy.

Refer to disabled or dimmed icons or menu options as *unavailable*. When referring to the appearance of an unavailable icon or option, use *dimmed* rather than grayed, grayed-out, or disabled.

Use *select* to refer to:

- Designating a record, file, or other entity to be acted upon, generally in a list or browse. For example:
Select a record from the look-up browse.

- The act of enabling an option indicated by a check box. Use *clear* to refer to disabling a check box. For example:

Select the Hidden Fld Labels? option to hide fields for which this profile is denied access.

Do not use *check* or *uncheck* to describe the act of selecting or clearing a check box. Describe the state of a check box using the adjectives *selected* and *not selected*.

Note Use this convention only with check boxes in non-company programs. In our product UI, check boxes are handled identically to other types of logical fields.

See “Logical Fields” on page 202.

Describing Software Elements

Make sure you always use the correct terms to refer to the basic screen elements and types of programs in the software.

Avoid personification of the software. For example, the system asks you should be replaced with the system prompts you.

The product interface consists of windows, made up of frames with fields. Some programs have pop-up windows that prompt for additional information. They usually contain a few additional fields that may not fit in the body of the frame. Pop-up windows should be distinguished from message prompts, which can be described simply as *a message displays*.

Tip
Pop-ups are also known as overlay frames.

The windows that display possible values for a field are called *lookups* or *look-up browses*. In the Windows interface, you can also display drill downs or power browses.

Note Do not use the expressions *help window* or *scrolling window* to refer to lookups.

For definitions of interface terms, see the glossary in *User Guide Volume 1: Introduction*. For definitions of interface terms that are specific to Desktop, see *User Guide: Desktop*.

Key Commands

In company documentation, never refer to function keys such as F1 and F2 by name, since these keys have different associated functions in the various different interfaces of the product. References to function keys should always be changed so they are not interface specific; for example, Go, End, or Back.

For a complete list of available keyboard commands in the character and Windows interfaces and the command names you should use to describe them, see the appropriate tables in *User Guide Volume 1: Introduction*.

For information on the keyboard commands used in Desktop, see the preface to *User Guide: Desktop*.

Database Tables

In past versions of software, database tables were referred to as *files*. Recently, all interface references to file were changed to table or removed. For example, control files are now referred to as control programs. You should never refer to a database table as a file, even though programmers may use this term in design documents.

Use the term *control program* only to refer to programs available as option 24 on a menu. While other kinds of maintenance programs can be viewed conceptually as creating control data, the term should be reserved for programs that actually update control tables.

Logical Fields

Use *Yes* and *No* to indicate valid values for logical fields, even when these fields display as check boxes in the user interface.

Incorrect: In Supplier Item Maintenance (1.19), select Use SO Reduction Price.

Correct: In Supplier Item Maintenance (1.19), set Use SO Reduction Price to Yes.

Labels

In general, spell field, frame, and menu labels as they appear in the interface. However, when a label is abbreviated in the interface and there is a risk of misinterpretation, you may want to spell out the full term in the documentation instead of using the abbreviated term.

For example, you can use Tax Included for a field labeled Tax In. However, simple, commonly used abbreviations like Sub-Acct and Pur/Mfg typically do not need to be spelled out.

Important In figure captions and index entries, always spell labels exactly as they appear in the interface.

Field labels in the user documentation should be based on those that display in the software interface when externalized labels are turned on. To turn on externalized labels, set Translate Frames to Yes in Label Control (36.4.17.24).

For details, see “Turning On Externalized Labels” on page 163.

Menus and Menu Numbers

- Do not use menu numbers in graphics.
- Do not use menu numbers in headings. It makes both the table of contents and cross-referencing unwieldy.
- Do not include menu numbers as part of the index entry for a menu label. Instead, create a separate entry for the menu number.
- In user guide material, menu numbers only need to be used for the first reference to a program in a major section. They do not need to be repeated in consecutive paragraphs. The same applies to acronyms, which only need to be defined when they are introduced.
- Some program names have hyphens in the user interface. When referring to these programs in FrameMaker documents, use the en dash with no spaces. When referring to these programs in online help, use a floating hyphen (space on either side).
- When referring to a nested menu entry in the Windows environment, use the pipe character (|) to separate option levels, as in the following example:

Choose File|Import|Formats.

See “Indexing Menus and Fields” on page 237 for additional indexing guidelines.

See “Hyphens” on page 189.

See “Captions” on page 183.

- Always use the menu number in the caption of a single screen capture or the first screen capture in a series. If there is a long series of screen captures for the same menu-level program, you do not need to repeat the menu number.