UCS Writing Guidelines

March 31, 2010

Contents

Symantec writing standards

This chapter includes the following topics:

About Symantec writing standards

Writers with different experience levels and backgrounds do not produce similar output. Although each writer may produce high-quality content, it may not be consistent in voice, organization, structure, and style. To achieve consistency, writers must follow shared writing guidelines. Standard writing guidelines provide writers with a common set of rules for language use.

Standard writing guidelines ensure that writers develop content that has the following characteristics:

■ Contains reusable, topic-oriented content

■ Uses controlled language and standardized terminology

- Complies with machine translation rules
- Supports and is consistent with the Symantec brand

The Unified Content Strategy (UCS) team develops and maintains Symantec writing standards, models, and tools.

The UCS team develops processes and the tools that offer the following benefits to internal and external customers:

- Improved accuracy, quality, and consistency of content
- Strong Symantec brand due to seamless integration of content from widely different origins
- Reduced costs for localization, which allows more languages to be translated

About topic-based writing

Topic-based writing is a structured and modular approach to content development where topics are the basic units. It is a way to develop focused and concise units of information that anticipate and target specific user goals. The topic-based writing approach is designed to support all output formats, from PDF with more linear book-like outlines to Help or Web content. Topics can be used as stand-alone units or as building blocks that can be grouped into larger units such as chapters, books, or parts. Topics are connected to other topics by cross-references to provide context and navigation.

About topics in general

A topic is the basic building block in the topic-based writing approach. It is the basic unit of all the deliverables that InfoDev builds and the smallest unit of reuse. A topic corresponds to a section in Vasont. It consists of a title and the content that follows the title.

Create the content of the topic with the following principles of effective technical communication and learning theory:

■ Users and readers process information in small, manageable units.

■ Writers need to create and label manageable units of content called topics.

■ Every topic needs to focus on only one idea.

■ All information in a topic must be relevant to the idea.

A topic has the following characteristics:

■ Fully answers a single question that is related to a user goal

■ Treated as a unit, often seen by users on a single screen

■ Can be accessed individually, often by multiple methods

■ Has a recognizable, predictable structure

■ Cross-references to related information in other topics

See

Resources for standardized writing

Symantec content follows specific style conventions. These conventions support the development of global, reusable content.

The *SymTOP User Guide* documents the style conventions that differ from accepted industry standards. In addition, Symantec content providers use a controlled authoring tool, acrocheck, to minimize ambiguity and promote consistency in English source content.

For any issues that are not addressed in the *SymTOP User Guide* or acrocheck, use the following reference materials:

Microsoft Manual of Style for Technical Publications	General Windows UI and terminology resource
The Chicago Manual of Style	General grammar and punctuation resource

Read Me First! A Style Guide for the Computer Industry (from Sun)	General UNIX UI and terminology resource
Apple Publications Style Guide	Questions that are specific to the Macintosh terms, software, and hardware
	The current Apple Style Guide is available for download at Apple's Web site as well as a list of Mac OS X guides.
Microsoft Computer Dictionary	Technologies, terminology, and acronyms resource
The American Heritage Dictionary of the English Language	General spelling, capitalization, and terminology resource

See

About effective topic titles

The title of a topic is the first thing that users encounter when they look for help with a task. They may find the topic in a PDF, on a Symantec Web site, or elsewhere on the Internet. For this reason, topic-based writing emphasizes meaningful and descriptive topic titles.

Topic titles are used as organizers to provide an overview of the information that is contained in the content that follows. Rather than read documentation from start to finish, users scan to search for the information that they need.

Effective topic titles help content developers to more quickly locate and assess content in the content management system. In this way, they help content developers to more quickly take inventory of their content assets, especially when planning and writing content. Effective titles help developers to stay focused on the theme of the content.

Topic titles should do the following:

■ Be descriptive, address one specific question that a user might have about a particular topic.

■ Orient users so that they can determine from the title whether to read the topic content or continue to scan for more relevant information.

■ Indicate the type of information (conceptual, procedural, or reference) so that users get to the information they need quickly.

■ Be context free and not be dependent on body content or other topics in a nested structure to make sense. Context-free titles can appear in a table of contents, index, Help, or cross-reference.

■ Facilitate accurate content retrieval for Web search engines.

Guidelines for writing topic titles include the following:

■ Use the standard grammar and the vocabulary that are meaningful to users.

■ Make titles unique within the deliverable so that users can identify all of the content that meets their information needs.

■ Develop titles that are based on the questions that users might ask, but do not write titles as questions.

■ Use plural forms whenever possible. These help reduce verbiage and improve readability.

■ Avoid too much detail, especially the long titles that wrap to the next line.

■ Avoid too little detail, such as a one-word title.

■ Use sentence-style capitalization.

See "About capitalization" on page 10.

■ Avoid vague titles like Using <product name> and Working with <product name>.

■ Avoid jargon and technical terms.

See "Jargon" in the *Microsoft Manual of Style for Technical Publications*.

■ Do not begin a title with an article (a, an, the).

About acronyms

Observe the following guidelines when you use acronyms:

Avoid using acronyms for Symantec trademarks	Do not use acronyms to abbreviate Symantec trademark names. For example, type NetBackup, not NBU. See "Symantec Trademark Usage Guidelines" on the Symantec Legal Department Web site: http://syminfo/legal/trademarkGuidelines.asp
Spell out unfamiliar acronyms on first usage	If your readers are unlikely to be familiar with an acronym, spell out the complete term the first time that it appears in a topic. Then type the acronym in parentheses immediately after the complete term. HTML and RAM are examples of industry standard acronyms that you do not need to spell out. If you are unsure whether you need to spell out an acronym, consult with other writers, your editor, or your term admin.

Avoid punctuation of acronyms	Do not punctuate acronyms. The acronym for hypertext markup language is HTML, not H.T.M.L.
Index an acronym using the same form as in the text	If you index an acronym, consider how it is used in the topic. If it is a common acronym, use the acronym as the primary index term rather than spelling it out. If necessary, you can also create a see reference under the complete term that points users to the acronym entry. This practice ensures that all users can find the information, whether they look under the acronym or under the complete term. See "About see and see also references in index entries" on page 63.
Follow the standards for approved acronyms	Approved acronyms appear in the following resources: ■ The standardized terminology list The standardized terminology list is located at the following URL: http://infowiki.corp.symantec.com/infowiki/index.php/Acrocheck See "About standardized terminology at Symantec" on page 67. ■ The global glossary You can search for terms in the Glossary Sources collection in Vasont.

See "About Symantec writing standards" on page 5.

About capitalization

In general, capitalize the initial letter of a proper noun. Do not capitalize the first initial letter of common nouns. Do not overuse capitalization. Use lowercase unless you have a specific reason to capitalize.

InfoDev maintains a database of standardized terminology. Check this list for terms with approved capitalization.

The standardized terminology list is located at the following URL:

http://infowiki.corp.symantec.com/infowiki/index.php/Acrocheck

For product name capitalization guidelines, see the list of Symantec trademarks in the *Symantec Corporate Editorial Style Guide*, available on the Symantec intranet.

For other words, use the *American Heritage Dictionary*. Use *The Chicago Manual of Style* for general capitalization guidelines. Use the *Microsoft Computer Dictionary* for capitalization of technical terms.

Table 1-1 lists the capitalization guidelines for some common items that appear in our documentation.

Table 1-1   Capitalization guidelines

Item	Capitalization style	Example
Command-line text (Windows-based)	Case sensitive	cp/etc/home/MYFILE/export
Dialog box titles	Follow UI	New Job dialog box
Error messages or alert	Follow UI	Virus in Memory: The Cascade.1701.F virus was found in memory.
Icon name	Follow UI	Recycle Bin
Window name	Follow UI	Help window
File name	Initial caps (Windows only) UNIX and Linux file and path names are case sensitive Mac OS X file and path names can be case sensitive	Config.sys
Folder name	Initial caps (Windows only) UNIX and Linux file and path names are case sensitive Mac OS X file and path names can be case sensitive	Windows
Path	Initial caps (Windows only) UNIX and Linux file and path names are case sensitive Mac OS X file and path names can be case sensitive	\NSC Repository\Products\
File extension	Lowercase (Windows only)	.doc
Unnamed dialog box or window	Lowercase (Windows only)	document window
URL	Lowercase (Windows only)	www.symantec.com
Acronym See "About acronyms" on page 9.	Uppercase	HTML, LAN, PDF

Table 1-1   Capitalization guidelines *(continued)*

Item	Capitalization style	Example
Chapter title	Sentence style (first word and proper nouns only)	Maintaining virus protection Getting started
List item See "About bulleted list capitalization" on page 18.	Sentence style (first word and proper nouns only)	Unformatted disk MIS creates a server list
Topic title See "About effective topic titles" on page 8.	Sentence style (first word and proper nouns only)	Maintaining virus protection Responding to Symantec Client Firewall alerts
Table entry See "About table punctuation" on page 32.	Sentence style (first word and proper nouns only)	Unformatted disk
Book title	Title style	*LiveUpdate Administrator's Guide*
Index terms See "Style conventions for index entries" on page 62.	Use initial capitalization for products, product components, and interface elements. Use lowercase for all entries that are not case sensitive.	Add/Remove Products Wizard Change Log query Decision Support Center export file format types print order

See "About Symantec writing standards" on page 5.

About punctuation

For information on general punctuation rules and usage, see *The Chicago Manual of Style*.

The following rules apply to end punctuation in Symantec documentation:

Abbreviations and acronyms   Do not use periods in abbreviations and acronyms, except for A.M. and P.M. and for hardware measurements. (For example, abbreviate inch as in.)

URLs	Do not use punctuation at the end of any sentence that ends with a URL. Always put the URL in a separate para and omit any punctuation or other text that is not part of the URL.
	For example:
	You must install both AppSec and the AppSec hotfix. You can find information about installing AppSec and the hotfix at the following URL:
	www.microsoft.com/windows2000/library/resources/reskit/tools/ hotfixes/appsec-o.asp
Text that users type	Do not use punctuation at the end of any sentence that ends with a command or other text that a user should type. This rule is important because a period can be misconstrued as part of the command or other text that the user should type.
	For example:
	At the command prompt, type the following:
	`net use \\`*`computer_name`*`\ipc$/user:`*`username`* *`password`*
	For example:
	On the **Server** tab, in the **Master Server** box, type *server_name*

See "About Symantec writing standards" on page 5.

See "About bulleted list punctuation" on page 19.

See "About bulleted list punctuation" on page 19.

About parallel construction

You must use parallel construction within bulleted lists, tables, and figure callouts. You must ensure that each list item is written in the same way. For example, if you begin an item with a verb, every item in the bulleted list or table column must begin with a verb. If you begin an item with an option name, every bulleted list item or table column item must begin with an option name.

Table 1-2 shows examples of how some bulleted lists that are incorrectly structured can be rewritten to use parallel construction.

Table 1-2   Examples of parallel and non-parallel construction in bulleted lists

Correct (parallel construction)	Incorrect (non-parallel construction)
When Symantec AntiVirus for Handhelds - Corporate Edition identifies a suspicious file, it does the following:	When Symantec AntiVirus for Handhelds - Corporate Edition identifies a suspicious file, it does the following:
■ Blocks the access to the file ■ Displays a dialog box that provides information about the potentially infected file and lets you delete or allow the suspicious file ■ Logs the found virus as an event	■ Blocks the access to the file ■ The program displays a dialog box that provides information about the potentially infected file and lets you delete or allow the suspicious file. ■ Logs the found virus as an event
The event log reports errors or timeouts from the following sources:	The event log reports errors or timeouts from the following sources:
■ Timeouts that occur when you run a policy ■ Timeouts that occur when you run a job step ■ Errors that occur when you run a job	■ When you run a policy, a timeout occurs ■ Timeouts that occur when you run a job step ■ Errors that occur when you run a job

See "About Symantec writing standards" on page 5.

About domain names and IP addresses for use in examples

When you need to use an example domain name or IP address in your content, do not use an example that resolves to a real Internet domain or server.

Symantec has acquired the following domain names for use in examples:

■ www.blocksads.com

■ www.uninvitedads.com

■ www.noadsorspam.com

■ www.symantec-internetsecurity.com

■ www.symantecinternetsecurity.com

■ www.symantecs.org

■ www.symantecexample.com

■ www.symantecdomain.com

When you need to use an example IP address in your content, use an address from the following ranges of private addresses in all examples:

■ 10.0.0.0 - 10.255.255.255

■ 172.16.0.0 - 172.31.255.255

■ 192.168.0.0. - 192.168.255.255

Note: If you use screen shots in your content, be sure that you use example values for domain names and IP addresses in the UI when you take the screen shot.

See "About Symantec writing standards" on page 5.

Bulleted lists

This chapter includes the following topics:

- About bulleted lists
- About bulleted list capitalization
- About bulleted list punctuation

About bulleted lists

When writing bulleted lists, use the following guidelines:

- Use bulleted lists to present nonprocedural, nonsequential items or ideas in an easy-to-read format.

- Use parallel construction for bulleted list items.

  See "About parallel construction" on page 13.

- Consider using a table rather than a bulleted list if your descriptive text is lengthy or you have three or more bulleted items that have descriptive text.

  See "About tables" on page 29.

Symantec standards permit one level of nesting. That is, an item in a bulleted list can contain a sub-bulleted list.

Bulleted lists should be introduced by a single sentence that ends in a colon. Do not include the number of options as they may change, which will mean an unnecessary localization cost. Instead, use the phrases "as follows" or "the following."

Introduce every bulleted list that appears in body text in one of the following ways:

- *Insert descriptive text here* in the following ways:

- *Insert descriptive text here* in one of the following ways:

- *Insert descriptive text here* as follows:

- *Insert descriptive text here* the following *descriptive text*:

Sometimes an introduction to a bulleted list must be longer than one sentence. In this case, ensure that all of the sentences are relevant to the bulleted list that follows. If they are, they can be included in the same element as the intro sentence.

Table 2-1   Examples of bulleted list introductory sentences

Correct	Incorrect
Products acquire new configurations in the following ways:	There are two ways that products acquire new configurations:
You can create firewall rules with Internet Access Control in one of the following ways:	There are four ways to create firewall rules with Internet Access Control:
The sources of Symantec Client Firewall information are as follows:	There are three sources of Symantec Client Firewall information:
SESA provides flexibility for the following installation strategies:	SESA provides flexibility for different installation strategies:

See "About bulleted list capitalization" on page 18.

See "About bulleted list punctuation" on page 19.

About bulleted list capitalization

Use sentence-style capitalization for items in a bulleted list. Sentence-style capitalization is when you capitalize only the first word of a sentence or phrase. Consider the following example:

At the client level, Symantec Client Security includes the following forms of protection:

- Virus protection

- Content filtering

- Firewall

- Intrusion detection

When possible, avoid starting bulleted list items with a specialized case-sensitive term. An example might be a function name or product name that begins with a

lowercase letter such as "iPod." When you use acrocheck, it flags these types of words.

General information on how to capitalize words in Symantec content is available.

See "About capitalization" on page 10.

See "About Symantec writing standards" on page 5.

See "About bulleted lists" on page 17.

About bulleted list punctuation

Punctuate all items in a bulleted list uniformly. Use end punctuation only if one or more of the items is a complete sentence.

You do not need to include end punctuation for an incomplete phrase even if the bulleted list item is followed by a complete sentence in a continuation para.

Table 2-2   Examples of bulleted list punctuation

Type	Example
Bulleted list with continuation text	The Symantec AntiVirus Corporate Edition server program does the following: ■ Protects the computer on which it is running ■ Manages other Symantec AntiVirus Corporate Edition servers and clients If a Windows-based network server needs protection only, install the Symantec AntiVirus Corporate Edition client program.
Bulleted list in a procedural step	◆ In the left pane, select one of the following options: ■ **Scan a Floppy Disk** This option is available only when a floppy disk drive is present. ■ **Scan Computer**
End punctuation for imperative sentences in bulleted list	To change the client group name, complete the following tasks: ■ Create a new client group by importing settings from another client group. ■ Move clients from the old client group to the new client group. ■ Delete the old client group.

See "About parallel construction" on page 13.

See "About punctuation" on page 12.

See "About Symantec writing standards" on page 5.

Cross-references

This chapter includes the following topics:

- About cross-references
- About cross-reference roles
- About text references
- Cross-reference best practices

About cross-references

In a section, you can add a cross-reference that links to the following elements:

- Another section
- A procedure in the same section (when a section contains multiple procedures)
- A step in the same procedure (for example, to tell users to repeat a particular step)
- A table in the same section
- A figure in the same section

Never create the following types of cross-references:

Cross-references to procedures, steps, tables, or figures in other sections	Cross-references to procedures, steps, tables, or figures in other sections break if the topic is published to the Web or symHelp.
	Instead, reference the other section that contains the procedure, step, table, or figure.
	Note: If the title of the other section does not make it clear why you are referencing it, then examine the other section. Perhaps the title should be revised. Or perhaps the section describes more than one idea or answers more than one question: in this case you should consider dividing the section into two separate topics.
Cross-references to chapters or appendixes	In our topic-oriented publishing model, a source section cannot contain cross-references to chapters or appendixes. Chapters and appendixes are containers for sections. They do not have unique content of their own to reference. The sections that are included in a chapter or appendix can vary from output to output.
	Instead, reference one or more key topics in the chapter or appendix.
Cross-references to other deliverables	You cannot create a linked cross-reference to another deliverable. If necessary, type a text reference to the book in its own para element.
	See "About text references" on page 25.

Each cross-reference to a section must be in its own paragraph, without any other content. This practice enables topic reuse in multiple deliverables, because a cross-reference in a deliverable can be suppressed when necessary.

For example, section A includes a cross-reference to section B. But if section A is included in a deliverable that does not include section B, then the cross-reference to section B cannot be resolved. To solve this problem, an unresolved cross-reference is automatically suppressed (omitted) in a deliverable output. If a cross-reference is isolated in its own paragraph, it can be suppressed without losing any text or leaving an incomplete sentence.

The only exception is for a cross-reference that links to a figure, a table, or a step in a procedure. This type of cross-reference is embedded in text: either the text that introduces the table or figure or the step text that refers a user to another step. A specific role, called the link role, is applied to this type of cross-reference to identify it. A cross-reference with the link role applied to it is never suppressed automatically.

You complete the following tasks to create a valid cross-reference:

Add an xref element.	To create a cross-reference, you add an xref element. Xrefs are inline elements.
Specify the role for the xref.	In an output (PDF or Help), the cross-reference includes auto-generated text that varies based on the role that is assigned to the xref. See "About cross-reference roles" on page 23.
Resolve the cross-reference (link it to the target element).	To identify the element that the cross-reference should link to (the target), the client key of the target element is stored as an attribute of the xref element.

About cross-reference roles

Every cross-reference requires that you specify the role attribute for the xref element. In a PDF or Help extract, the role determines how the cross-reference is generated. The role controls what text is auto-generated and, in some cases, where the cross-reference appears in the final output.

For example, in a PDF extract, the linkseeheading role and linkmoreinfo role both produce the same result: a cross-reference that displays the title of the target section, preceded by the word "See" and followed by "on page #."

However, in Help extracts, when you assign the linkmoreinfo role, the cross-reference moves out of its context. Instead of appearing in the body of the topic, it moves to a list of related topic links at the bottom of the Help page. In these links, only the section title appears.

In a Help extract, the page number is never relevant; it is omitted from all cross-references, regardless of role.

Note: In an online PDF output or a Help system, the link color is blue. In a Print PDF output, the link color is black. A Print PDF is sent to a vendor to generate a printed manual. Unless the link color is black, the link text appears gray on the printed page.

Table 3-1 describes the xref role attributes that you can use.

Table 3-1   Cross-reference role attributes

Role	Usage	Output display characteristics
link	Inline links to table, figure, and step elements only. (The sentence that introduces this table is an example.) **Note:** Type a space after the xref element, to separate it from the first word in the rest of the sentence.	■ PDF outputs Displays the number of the table, figure, or step. For example, "Table 1-1" or "Figure 1-1". For a link to a step, only the step number is generated (the word "step" is not auto-generated). ■ Help outputs A cross-reference to a step displays the step number, as it does in a PDF. But cross-references to tables and figures display the table or figure title text instead of the table or figure number. The numbering system that is used in PDFs is not applicable to a Help system.
linkseeheading	■ Links to sections, when you do not want the cross-reference to appear at the bottom of the topic page in a Help output. ■ Links to procedures in the same section (when the topic contains multiple procedures). **Note:** Do not type a period after the xref element. The period is added when the content is extracted.	■ PDF outputs Displays the title text of the target, preceded by the word "See" and followed by "on page #." (including the period). ■ Help outputs Displays the title text of the target, preceded by the word "See" and followed by a period.
linkmoreinfo	Links to sections, when you want the cross-reference to appear in a related topics list at the bottom of the topic page in a Help output. **Note:** Do not type a period after the xref element. The period is added when the content is extracted.	■ PDF outputs Displays the title text of the target, preceded by the word "See" and followed by "on page #." (including the period). ■ Help outputs Displays the title text of the target only, under an auto-generated heading at the bottom of the Help page.
linkmoreinfoside (consumer only)	Links to sections in Consumer source collection, when you want the cross-reference to appear out of its context in both Help and PDF outputs. **Note:** In XMetaL, these cross-references appear in purple text within body content.	■ PDF outputs Displays the cross-reference in the margin, next to the paragraph that precedes it in the XML. This style is applicable to consumer guides only. ■ Help outputs Displays the title text of the target only.

About text references

You sometimes refer a user to other information without using a hyperlinked cross-reference. For example, you cannot create a linked cross-reference to another deliverable book. Instead, you type a text reference to the book in its own para element.

In the text reference, do the following:

■ Specify the relevant information that users can find in the book.

■ Refer to the document by title only; do not include chapter or page numbers.

■ Wrap the title text in the citetitle inline element.

For example:

For more information on configuring, building, and deploying custom installation packages, see the *Symantec pcAnywhere Administrator's Guide*.

A topic can be used in multiple deliverables. A topic that contains a reference to a Symantec product manual should not be used in the deliverable that it references. If necessary, you can apply a condition to the para that contains the text reference to control which outputs the reference appears in.

Cross-reference best practices

At Symantec, any topic can potentially be viewed by a user in isolation, out of context of other topics, depending on the type of output. For example, a topic may be a result of a Google search and topics can be viewed individually on the Symantec support site. Topic-to-topic cross-referencing provides context and creates a network of content. Consider the following information when planning the navigation for your content.

Note: Links to tables and figures in the same topic do not provide topic-to-topic navigation. Nor do textual references to other deliverables.

| Table 3-2 | Guidelines for meaningful cross-references |

Best practices	Comments	Questions to ask yourself
Each topic must have at least one cross-reference to another topic.	At least one cross-reference must link to another topic.	■ Does my topic have at least one cross-reference to another topic? ■ After reading my topic, what questions related to this information might my readers have?
Each topic must have at least one cross-reference pointing to it from other topic.	Links from other topics provide information to users they may not have known to search for. Without links from other topics, your topic may not be found.	What paths of inquiry might a user follow to this topic?
Cross-references generally belong at the end of a topic.	■ Cross-references can disrupt the flow of the topic. Readers might get confused as to how important they are and whether they should leave a topic to follow the cross-references. ■ Putting cross-references at the end of a topic doesn't disrupt the uptake of the main information in the topic. It is acceptable to list cross-references after a procedure in a task topic. ■ Place cross-references following a paragraph only if the immediate context and proximity matter (consider 1 or 2 at a time). For example, a cross-reference from a task topic back to its related process topic must follow the introductory paragraph.	■ Where are the cross-references in my topic? ■ Will the user think it is necessary to follow the link?
Use process topics to help the user navigate through multiple stages to complete a high-level task.	Each step or phase of the process table contains a cross-reference to a related topic. Each task, concept, or reference topic that links from the process topic must also link back to the process topic.	■ Is this task part of a larger process? ■ What related conceptual or reference information does a user need to complete the task?

Table 3-2	Guidelines for meaningful cross-references *(continued)*	
Best practices	**Comments**	**Questions to ask yourself**
Not every topic needs to cross-reference to every other topic in a cluster. Avoid too many cross-references in a single topic.	Too many cross-references may distract the user or make it more difficult to scan and read your topic. Think about where they are in accomplishing their task and what information they need.	■ How much of a user task is already complete? ■ What is left to do? What does the user still need to know? ■ How readable is my topic?

Tables

This chapter includes the following topics:

- About tables
- How to introduce a table
- How to write table titles and column headings
- About table punctuation

About tables

Use tables whenever information would be clearer if presented in rows and columns. You can use tables in body text and in procedures. (Do not use tables in notes and warnings.)

Tables can contain paragraphs, bulleted lists, notes, warnings, and graphics. Tables cannot contain full procedures. If a numbered list is necessary in a table, use the orderedlist element instead of the procedure element.

You can create two different types of tables: complex tables and informal tables. If you add a table to a procedure step, the table must be an informal table.

See "Guidelines for using tables in procedures" on page 47.

For each type of table, you can specify (and later modify) the number of columns and rows that it contains.

You can make either type of table a wide table. A table normally spans the width of the text column in a PDF output. A wide table spans the width of the page, from margin to margin.

Table 4-1 describes the types of tables that you can create.

Table 4-1   Table types

Table type	Element used	Description
Complex table	Table	■ Has a title and a top row of column headings ■ Used for all tables with three or more columns and for context-sensitive Help options ■ Used for two-column tables where data is difficult to read without vertical lines or a descriptive header ■ In a PDF output, formatted with borders and shading
Informal table	Informaltable	■ Has neither a title nor a row of column headings ■ Used when placement is important for readability ■ Used instead of a bullet list with two levels of information (for example, for options and descriptions) ■ In a PDF output, has no borders or shading

In Vasont, you can add a table by cloning one from the Templates collection.

You can do the following in XMetaL:

■ Create tables.

■ Change table types (informaltable to table, for example).

How to introduce a table

You introduce a table in the following ways:

Informal table	Requires an introductory sentence in a para element The sentence should end in a colon and use one of the following constructions: ■ <Insert descriptive text here> in the following ways: ■ <Insert descriptive text here> in one of the following ways: ■ <Insert descriptive text here> as follows:

Complex table	Introductory sentence optional
	If the title and column headings are adequate, an introductory sentence may not be necessary. Do not merely repeat the information in the table title. Instead, provide additional information or omit the introductory sentence.
	An introductory sentence should be isolated in its own para element. It must start with a cross-reference to the table and end in a period. The xref element in the introductory sentence must have the role attribute set to link.
	See "About cross-reference roles" on page 23.

Table 4-2 includes correct and incorrect examples of introductory sentences for complex tables.

Table 4-2   Complex table introductory sentences

Correct	Incorrect
Table 5-1 includes information about the configuration parameters.	The configuration parameters are described in Table 5-3.
Table 1-1 lists and describes the main components of Symantec Client Security.	The main components of Symantec Client Security are listed in Table 1-1.
Table 5-2 lists the methods that you can use to install Symantec Client Security servers.	You can install Symantec Client Security servers using any of the methods that are listed in Table 5-2.

Note: If you conditionalize a table, the para that contains the introductory sentence to the table must also be conditionalized with the same condition name.

How to write table titles and column headings

Complex tables always include titles and column headings.

Table titles should be brief and to the point. Do not provide an in-depth explanation of the table's contents in the table title. Detailed information belongs in the body text that precedes the table.

Every table title should be unique. A deliverable should never contain two or more tables with the same title.

Examples of good table titles include the following:

■   Components of Symantec Client Security

- Intrusion prevention tasks

- Symantec Client Security client types

- Virus definitions files update methods

Use the following guidelines for column headings:

- Always use sentence-style capitalization.

- Always use parallel construction.

See "About tables" on page 29.

About table punctuation

The following guidelines pertain to content in a table cell:

- Make sure that the entries in a table column follow the style of the column heading.

- Within a table, use sentence-style capitalization for column headings and cell content.

- Within a table, use end punctuation with complete sentences only.

- If a table contains a mixture of sentence fragments and complete sentences, use end punctuation on all entries.

  Use parallel construction to avoid mixing complete and incomplete sentences within a table.

  See "About parallel construction" on page 13.

See "About Symantec writing standards" on page 5.

See "About punctuation" on page 12.

See "About bulleted list punctuation" on page 19.

Procedures

This chapter includes the following topics:

About writing procedures

A procedure can be a single step or a series of steps that are performed in a specific sequence. A procedural step tells the user to make a decision or perform an action. You can create procedures in XMetaL.

Use the following guidelines when you write procedures:

Number of actions in a step	If possible, each step should include only one action. In some cases, you may need to include more than one action in a step. A step that describes more than one action is known as a narrative step.
	See "About narrative steps" on page 38.
Number of steps in a procedure	Try to limit multiple-step procedures to no more than nine steps. If more than nine steps are necessary, try to break the procedure into several smaller ones or use narrative steps.
	See "When to break up a procedure" on page 45.
Location of procedure in a topic	The procedure is the last element in the topic. Do not follow a procedure with body text, notes, or other content except for cross-references. You can add cross-references after a procedure, if the cross-references point to other topics and have the linkmoreinfo role applied.
	See "About cross-reference roles" on page 23.
	If additional text is needed and it is related to the last step, add continuation text within the last step. If the additional text relates to the task as a whole, place it before the procedure.
Number of procedures in a topic	A task topic can include more than one related procedure. If appropriate, the final step of the first procedure can instruct the user to perform the task in the next procedure. You can add a cross-reference in the step that points to the next procedure.
	Do not add text between the procedures. As a best practice, add a table to the topic, above the first procedure, that lists and describes each procedure in the topic. Include a cross-reference to each procedure in the table.
Final action in a procedure	Always include the final action that the user must perform to complete a task, even if it seems obvious (for example, Click OK).

Actions that can be performed in multiple ways	If there is more than one way to perform an action in a step, use the preferred method. Generally, use the product UI to accomplish an action. For example, instruct the user to select the Copy command from a menu instead of using the Ctrl-C keyboard shortcut. Keyboard shortcuts are for advanced users. If you want to document other methods, point the user to an appropriate reference topic.

See "About procedure titles" on page 35.

See "About orienting users in procedures" on page 36.

See "About describing UI options" on page 42.

See "About documenting wizards" on page 47.

See "Guidelines for using tables in procedures" on page 47.

About procedure titles

Begin procedures with an infinitive phrase that starts with To. Make sure that procedure titles use the same wording as the topic titles under which they appear.

Table 5-1 shows how topic titles and procedure titles should be similar.

Table 5-1   How to write correct procedure titles

Topic title	Procedure title
Deleting files from your desktop	Correct: To delete files from your desktop Incorrect: To remove a file from your desktop
Configuring NetWare servers	Correct: To configure NetWare servers Incorrect: To set up NetWare servers

See "About effective topic titles" on page 8.

See "About writing procedures" on page 33.

About orienting users in procedures

To orient the user means to tell the user the location in which an action is to be performed. Orient users before you tell them what to do; that is, specify the location of an action, and then the action.

If several sequential actions take place in the same location, you need not repeat the location in each step.

When a step requires the user to navigate multiple subtabs or submenus, specify each UI element, separated by a greater than (>) symbol, as in the following examples:

Subtabs:

> 2. ⊟step⟩ ⊟para⟩On the ⊟guilabel⟩Configuration > Scan Now > Basics ⟨/guilabel⟩ tab, under ⊟guilabel⟩What to scan ⟨/guilabel⟩ , click ⊟guimenuitem⟩**All databases in the default directory** ⟨/guimenuitem⟩. ⟨/para⟩ ⟨/step⟩

Submenu:

> 4. ⊟step⟩ ⊟para⟩On the ⊟guilabel⟩File ⟨/guilabel⟩ menu, click ⊟guimenuitem⟩**New > File** ⟨/guimenuitem⟩. ⟨/para⟩ ⟨/step⟩

Use the > symbol when you refer to the name of a subtab in a procedure step, in body or table text, in a figure title, or in a table title.

Note: All UI text that you specify should be wrapped in a guimenuitem or guilabel element. Be sure to use the correct element.

See "When to use guimenuitem and guilabel" on page 43.

Table 5-2 includes specific information about how to orient users in various UI components.

Table 5-2 How to orient users in procedures

UI item	How to orient the user
Console	In the *console_name* console
Console pane	In the *console_name* console, in the left pane **Note:** In a console UI, always refer to the bounded areas of the window as panes.
Dialog box	In the *dialog_box_name* dialog box
Group box	Under *group_box_name*

Table 5-2   How to orient users in procedures *(continued)*

UI item	How to orient the user
Menu	On the *menu_name* menu
Menu and submenu	On the *menu_name* menu, click *submenu_name > option_name* For example: On the **File** menu, click **New > File**. **Note:** Wrap the submenu name, greater-than symbol, and option name in the same guimenuitem element.
Notification area (of Windows taskbar)	In the notification area **Note:** Do not use system tray, per Microsoft standards. For information about notification area, see the *Microsoft Manual of Style for Technical Publications, Third Edition*.
Page	On the *page_name* page
Pane	In the left pane
Tab	On the *tab_name* tab
Tab and subtab	On the *tab_name > subtab_name* tab For example: On the **Alert Messages > Administrator** tab **Note:** Wrap the tab, greater-than symbol, and subtab in the same guilabel element.
Toolbar	On the toolbar
Window	In the *window_name* window
Windows Start menu	On the **Start** menu, click *option_or_submenu_name*. For example: On the **Start** menu, click **Programs > Symantec AntiVirus**. **Note:** Wrap the greater-than symbol and the submenu or option name in the same guimenuitem element.

Often you instruct users to perform an action that displays a new dialog box, window, or other UI element. In that case, do not follow the step text with any continuation text that informs the user of the change in the UI display. Instead, orient the user at the beginning of the next step, as follows:

Correct:	**1**	Click **Configure**.
	2	In the **Configure FTP** window, type the FTP information that is needed to access the internal LiveUpdate server.
Incorrect:	**1**	Click **Configure**.
		The **Configure FTP** window appears.
	2	Type the FTP information that is needed to access the internal LiveUpdate server.

See "About writing procedures" on page 33.

See "About describing UI options" on page 42.

About orienting users on the Internet

In a procedure, when you direct users to a Web site, use the following wording:

On the Internet, go to the following URL:

URL

Always put the URL in a separate para element that contains no other text. Do not include end punctuation after the URL.

See "About writing procedures" on page 33.

About narrative steps

A narrative step is a procedural step that tells the user to perform more than one action. To shorten a lengthy procedure, you can sometimes combine several short steps into a single narrative step.

For example, in a dialog box, you need to instruct a user to type some information, save the change, and then close the dialog box. You can combine these actions into a single step as follows:

4   In the Create Account dialog box, type the name of the account, click **Save**, and then click **OK**.

Regarding the use of "and" versus "and then" before the final action, use "and then" when you need to indicate a sequence of actions. In the previous example, if it is possible that the user could click OK before the user clicks Save, then "and then" is appropriate. If the actions cannot be performed out of sequence (such as when you select a sequence of commands on a menu), then "and" is sufficient.

Narrative steps are also useful for wizard procedures, when the wizard includes many panels. You can use a narrative step for the click Next or click Continue step that advances the user to the next panel.

See "About documenting wizards" on page 47.

Limit narrative steps to two or three actions. If your narrative step contains more than three actions, consider creating a separate procedure for those actions.

See "When to break up a procedure" on page 45.

Note: We do not support nested procedures. That is, a step cannot be structured with nested steps so that it appears in an output as a numbered step with a series of lettered, indented substeps in it: for example, 2a, 2b, and 2c. Such a structure cannot be localized into all languages.

See "About writing procedures" on page 33.

About the use of click, select, and other action verbs

Use click or double-click as the action verb for most UI elements, which include buttons, menu options, and items in list boxes. Do not use choose as the action verb.

When a procedural step requires users to make a general decision (not perform a specific action), use select instead of click. Use select for unnamed items or for any items that are specific to the user's computer.

When users have a choice among several options in a single step, use select and present the options in a bulleted list or informal table.

Table 5-3 lists examples of when to use click.

Table 5-3   When to use click or double-click

Use	Example
For specific buttons, menu items, folders, or files	■ Click **Next**. ■ On the **File** menu, click **Open**. ■ Double-click the **Groups** folder. ■ In Windows Explorer, double-click **Modemcfg.exe** to run the utility.

Table 5-3 When to use click or double-click *(continued)*

Use	Example
For any icons that do not include a name or for nonspecific drives or folders	■ On the **Windows taskbar**, double-click the **Symantec AntiVirus Corporate Edition** icon. ■ Double-click a drive or folder to open or close it.
For specific drop-down list items	In the **Save** dialog box, in the **Files of Type** list, click **Policy Packages (*.cfp)**.
For bars in Consumer content	Correct: To set additional options 1 At the top of the main window, click the **Norton Internet Security** tab. 2 Click the **Miscellaneous Settings** bar to open it. Incorrect: To set additional options 1 At the top of the main window, click the **Norton Internet Security** tab. 2 Open the **Miscellaneous Settings** bar.

Table 5-4 lists instances in which you should not use click as the action verb.

Table 5-4 Exceptions: When not to use click

Exception	Example
Select in DOS procedures.	Select `Safe Mode`.
User makes a general decision.	In the **Save** dialog box, in the **Files of Type** list, select one of the following file types: ■ **Policy packages (*.cfp)** ■ **XML files (*.xml)**
Press a key.	Press **Enter**.
Move a slider.	Move the **Brightness** slider to the right to increase brightness.

Table 5-4   Exceptions: When not to use click *(continued)*

Exception	Example
Check or uncheck check boxes (not click to check or click to uncheck).	■ Check **Enable scheduled automatic updates**. ■ Ensure that **Schedule For Automatic Updates** is checked, and click **Schedule**.
Press a key and perform an action at the same time.	Press **Ctrl** and select the multiple log entries.
Expand or collapse a folder tree.	■ Expand **Histories**. ■ Expand the server, server group, or client group and look for more warning icons.

See

About keyboard terminology and keyboard actions

Spell key names as they appear on the keyboard.

Table 5-5 lists the terminology to use when you write about keys.

Table 5-5   Keyboard terminology

Rule	Example
Press a key. Do not use articles with key names. Do not include the word key.	Press **Tab**.
Type a character.	Type **X**
Run together all the two-word key names that appear on the keyboard to form one word with an internal capital letter.	Press **UpArrow**. Press **DownArrow**. Press **RightArrow**. Press **LeftArrow**.
Use Enter to process a command or insert a hard carriage return.	Press **Enter**.
Use Return for Macintosh.	Press **Return**.
Use a plus sign with no spaces to show a sequence of keys to press.	Press **Ctrl+Alt+Delete**.

Table 5-5   Keyboard terminology *(continued)*

Rule	Example
Use a comma to set off the keys that should be pressed separately.	Press **Alt+F**, **X**.
For punctuation marks in key combinations, type the punctuation mark name if it could be confused with a hyphen, an underscore, or a plus sign. Type in lowercase within parentheses.	Type **Alt+-** (hyphen).

See "Key Names" in the *Microsoft Manual of Style for Technical Publications.*

See "About Symantec writing standards" on page 5.

About describing UI options

When you write about elements of the UI (such as in dialog boxes, windows, and wizards), follow the UI for capitalization.

Specify the name of the option as it appears on the UI. With few exceptions, do not specify what kind of option it is (button, option, or other element). Exceptions include lists, arrows, and sliders.

Note: Be sure to apply the appropriate inline element to all UI text, text that the user types, UI elements that the user clicks, or keys that the user presses.

Table 5-6   How to describe UI options

UI element	Usage
Buttons	Specify the button name only. Do not include the word button. For example: Click **Save**.
Check boxes	Specify the check box name only. Do not include the word box. For example: Check **Enable scheduled automatic updates**.
Lists	Include the word list. For example: In the **Select an action** list, click **Verify**.
Arrows	Click the **Size** arrow.
Sliders	Move the **Brightness** slider to the right to increase brightness.

When to use guimenuitem and guilabel

All user interface (UI) objects that you name in documentation must have either the guimenuitem element or the guilabel element applied to them. Guimenuitem is used for UI objects with which the user interacts directly, such as a button or a menu item. Guilabel is used for UI labels, such as the title of a window or the name of a grouped set of UI objects.

Table 5-7 lists which inline element to apply to which UI object.

Table 5-7   Inline elements to apply to UI objects

UI object	Element	Description
Bar **Note:** Consumer only	guilabel	A labeled horizontal band that, when clicked, opens (expands) to display control elements, as in a dialog box. The only way to close (contract) a bar is to click a different bar in the same window.
Check box	guimenuitem	A square box that can be checked to turn on an option or unchecked to turn off an option. More than one check box in a group can be checked at any given time.
Column or row title	guilabel	The title that appears at the top of a column or beside a row in a display of tabular information. For example, "Description" at the top of this column should be tagged as a guilabel element.
Command button	guimenuitem	A rectangular button with rounded corners, usually with a label that describes its function. Users click command buttons to initiate commands.
Dialog box title	guilabel	The title that appears at the top of a dialog box. This title usually matches the name of the command that invoked it.
File name	guilabel	The name of a file as it appears in the UI when you need to refer to the file name as an interface object. An example of this situation is when you tell a user to double-click a particular file name in a procedural step.

<p style="text-align:center">**Table 5-7** Inline elements to apply to UI objects *(continued)*</p>

UI object	Element	Description
Folder name	guilabel	The name of a folder as it appears in the UI when you need to refer to the folder as an interface object. This reference is distinct from a path name.
Group box	guilabel	The label that identifies a framed or grouped set of related option controls.
Hyperlink	guimenuitem	A word or phrase in the UI that is presented as a hypertext link. Such text commonly is underlined and in a different color than the text that surrounds it. When a link is clicked, it brings up another interface display, such as a dialog box, or it initiates an action.
Icon	guilabel	The label that appears beside or beneath an icon in the UI.
List box	guimenuitem	Any type of box that contains a list of items that the user can select. The user cannot type a selection in a list box.
Menu	guilabel	The name of a menu as it appears in the menu bar. This name is distinct from the commands that appear in the menu, which you tag with guimenuitem.
Menu command	guimenuitem	A command that appears on a menu. For multiple commands on the same menu, include all of the commands and the intervening greater-than (>) signs within one set of guimenuitem tags.
Message box; alert box	guilabel	The name that appears in the title bar of a message box or an alert box.
Named toolbar	guilabel	The name of the toolbar.
Named view	guilabel	The name of a view, pane, page, or panel.
Option button	guimenuitem	A round button that the user clicks to select one of a group of mutually exclusive options. These are sometimes called radio buttons, though never in our documentation.
Slider	guimenuitem	An indicator on a gauge that displays a value from a continuous range, and that the user can drag to set a value.

	Table 5-7	Inline elements to apply to UI objects *(continued)*

UI object	Element	Description
Tab	guilabel	The name on the tab. The tab contains a labeled group of options that provide related settings.
Text box	guimenuitem	A rectangular box in which the user types text.
Unfold button	guimenuitem	A command button labeled with ">>" or "<<" that enlarges or minimizes a secondary window or pane that contains additional options or information.
Window	guilabel	The name that appears in the title bar of a window.
Wizard	guilabel	The title of the wizard.

When to break up a procedure

Usability studies show that procedures should contain no more than nine steps, where each step contains only one action. If a procedure contains more than nine steps, try to identify more than one task within the procedure. If you can identify more than one task, break each task into a separate procedure.

If you cannot identify more than one task, determine if you can break up the procedure into the different stages of the task with each stage containing its own tasks. Group the task stages into a process topic with a cross-reference to each task stage.

If a long procedure is necessary, use narrative steps to reduce the overall number of procedural steps. Narrative steps are often used in wizard procedures.

See "About narrative steps" on page 38.

See "About documenting wizards" on page 47.

Table 5-8 shows a procedure that is broken into two procedures, each of which describes a separate task.

Table 5-8   How to break up a procedure

Single procedure	Two separate procedures
To create basic Rescue Disks	To create basic Rescue Disks
1 At the top of the Norton Internet Security main window, click **Rescue**.	**1** At the top of the Norton Internet Security main window, click **Rescue**.
2 Under **Choose Rescue Type**, click **Basic Rescue**.	**2** Under **Choose Rescue Type**, click **Basic Rescue**.
3 Select the drive that you want to use to create the Rescue Disk set.	**3** Select the drive that you want to use to create the Rescue Disk set.
4 Insert a floppy disk into drive A.	**4** Insert a floppy disk into drive A.
5 Click **Create**.	**5** Click **Create**.
6 Insert additional disks as required.	**6** Insert additional disks as required.
Label the disks as you insert them.	Label the disks as you insert them.
7 Click **Restart** to test your newly created Rescue Disks.	To test your newly created Rescue Disks
■ If the **Rescue Disk** window appears, the Rescue Disk works properly.	**1** At the prompt, click **Restart**.
■ If the **Rescue Disk** window does not appear, the Rescue Disk does not work properly.	■ If the **Rescue Disk** window appears, the Rescue Disk works properly.
Warning: Do not continue with the rescue process when you test Rescue Disks. To prevent problems, do not repair a computer that functions properly.	■ If the **Rescue Disk** window does not appear, the Rescue Disk does not work properly.
8 To prevent any accidental changes to the data that is stored on the disk, remove the disk from drive A and slide open the plastic tab on the back of the disk to write-protect it.	**Warning:** Do not continue with the rescue process when you test Rescue Disks. To prevent problems, do not repair a computer that functions properly.
9 Shut down Windows if it is running.	**2** To prevent any accidental changes to the data that is stored on the disk, remove the disk from drive A and slide open the plastic tab on the back of the disk to write-protect it.
10 Turn off the power and turn it on again to restart your computer.	**3** Shut down Windows if it is running.
	4 Turn off the power and turn it on again to restart your computer.

See "About writing procedures" on page 33.

About documenting wizards

Use the following guidelines when you write procedures for wizards:

Do not capitalize the word wizard unless it is part of the feature name.	For example: ■ Symantec pcAnywhere offers some advanced configuration options that are not available in the wizard. ■ Use the Symantec Ghost Boot Wizard to create boot packages.
Wizards are made up of panels. Do not use the word window, dialog box, or screen when you refer to the elements of a wizard. This rule also applies to HTML wizards.	For example: In the Create Accounts panel, type one or more account names.
If the wizard is lengthy, you can combine actions that are performed in the same panel into a single step, which is known as a narrative step. See "About narrative steps" on page 38.	For example: Answer the survey questions, and click Next.
If a series of sequential panels is informational, you can document all of the panels in a single step.	For example: Read the remaining panels and click Next until you reach the *panel_name* panel.

See "About writing procedures" on page 33.

Guidelines for using tables in procedures

You can use a table to structure the information in a procedure step.

In procedure steps, use tables to do the following:

■ Present actions with their results, define terms, or describe options

■ Summarize groups of choices from which users can select

The paragraph that precedes the table in a step acts as the introductory sentence for the table content. The sentence should introduce the actions or options, and end in a colon.

If you do use a table in a procedure, you must use the informaltable element. An informal table has only two columns and does not have a title or header row. If you need to present more extensive tabular information, add a complex table above the procedure.

See "About tables" on page 29.

See "About writing procedures" on page 33.

Graphics

This chapter includes the following topics:

- About using graphics in Symantec documentation

- About the localization of graphics

- How to write graphics callout text

- How to introduce a figure

- How to write figure titles

About using graphics in Symantec documentation

Graphics can be screenshots, screenshots with callouts, or conceptual diagrams. As a best practice, only include graphics to illustrate or clarify complex concepts or complicated UIs that need explanation. Keep in mind that it is more expensive and time-consuming to localize graphics that it is to localize text.

See "About the localization of graphics" on page 50.

The following guidelines can help you determine whether a graphic is necessary and what the graphic should depict:

Use screenshots sparingly	Do not routinely include screenshots in procedure steps. When a screenshot is needed, it should show the result of the procedural step. Do not include figure numbers and titles for screenshots in procedures.

Avoid identifying information about persons, computers, and domains	Screenshots cannot contain information that identifies resources that belong to Symantec or other companies, such as the following:

- Computer names
- Employee names
- Folder or file names
- Project code names
- Domain names
- IP addresses

In screenshots and other examples, use only IP addresses that are private (that is, not assigned to a corporation and not routable on the Internet). Use only domain names that are included in the list of approved examples.

See "About domain names and IP addresses for use in examples " on page 14.

Follow the guidelines for the composition of callout text	Only use callouts when appropriate, and make them brief and concise.

See "How to write graphics callout text" on page 52.

See "How to write graphics callout text" on page 52.

See "How to introduce a figure" on page 52.

About the localization of graphics

If a PNG graphic is localized, the Localization team takes a new screenshot in each localized product GUI. The more screenshots that you include, the longer it takes and the more it costs to localize a document.

Screenshots should only be added to topics when necessary. For example, do not routinely add a screenshot for each step of a procedure. Only include a screenshot if the step cannot be described clearly without it.

If an SVG graphic is localized, the localization of the text in the graphic can be automated. Automating the translation of the SVG text saves Symantec money and lessens time to market.

The SVG localization process includes the following steps:

- The English text in the SVG is exported to an XML file.

- The XML file is translated (using machine translation if possible).

- The translated text is incorporated into the localized version of the SVG image.

To create SVG graphics that maximize the efficiency of the localization process, it is important to understand the issues involved in their localization. If an SVG is created properly, the localization team does not need to spend a lot of time tweaking each localized graphic.

When an SVG graphic is localized, the resulting image has the following characteristics:

- All text is left-justified.

- The translated text can take up to 30 percent more space.

- The text is not formatted properly unless it is in a separate text box from the object that it labels.

- Unwanted line breaks appear if character-level formatting was applied to the text.

To ensure that you create an SVG graphic that localizes successfully, use the following best practices:

Type text into a separate text box.	When creating a process flow or other diagram, do not add text directly to an object or line. Instead, type the text into a separate text box and then position the box on or under the object.
Left-justify all text.	All text is aligned to the left in the localized graphic. The left side of the text box stays in the same position, but the right side of the text box expands to the right if necessary to accommodate the translated text.
Leave room for the text to expand in the localized graphic.	When adding callouts or laying out a diagram, leave enough airspace around the text so that the image is still legible when the English text is replaced by a longer translation.
Do not apply character-level formatting to the text.	For example, do not italicize or boldface an individual word or phrase in a text box. In the localized graphic, the text will break into a separate line wherever the formatting starts and ends.
Avoid formatting that creates hanging indents.	For example, do not format text as a bulleted or numbered list. The special alignment characteristics do not survive the localization process.
Break a complex diagram into separate graphics.	For example, one graphic can show a high-level process flow, and other graphics can show detailed aspects of the process.

How to write graphics callout text

Graphics callouts should include descriptive text, not actions. Use callouts to identify parts of a graphic that are not obvious. Do not name the object that you are pointing to if it is clearly labeled. Avoid callouts on screenshots in procedures.

Use the following guidelines when creating callouts:

- Limit callouts to one sentence

- Do not use end punctuation

- If a callout must include two sentences, separate them with a semicolon and do not use end punctuation

- Use words that are consistent with the surrounding text
  For example, if a procedure is about deleting files, the associated callouts should refer to deleting, not erasing, files.

- Use parallel construction for each callout in a graphic

  See "About parallel construction" on page 13.

See "About using graphics in Symantec documentation" on page 49.

How to introduce a figure

Because figures include figure titles, they do not always require introductions in body text. Include an introduction if the figure is not clearly related to the body text. Do not merely repeat the figure title in the body text. Instead, provide additional information or omit the introduction.

When you introduce a figure, the introduction should meet the following requirements:

- Each figure introduction should be in its own paragraph, separate from other text.

- Each figure introduction should be a single sentence that ends in a period.

- The introductory sentence must begin with a cross-reference to the figure.

Use the following structure for a figure introduction:

<Figure x-x> shows <insert descriptive text here>.

Table 6-1   Figure stem sentence examples

Correct	Incorrect
Figure 1-1 shows the basic relationships among the security products that SESA manages.	See Figure 1-1 for information on the basic relationships among the security products that SESA manages.
Figure 1-3 shows the relationships among the Symantec Ghost console, the GhostCast Server, and Ghost.exe.	The relationships among the Symantec Ghost console, the GhostCast Server, and Ghost.exe are shown in Figure 1-3.

See "About using graphics in Symantec documentation" on page 49.

How to write figure titles

Figure titles should be brief and to the point. Do not provide an in-depth explanation of the contents of the graphic in the figure title. Detailed information belongs in the body text that precedes the figure or in callouts. Every figure title should be unique.

Examples of good figure titles are as follows:

■ Overview of Symantec Packager phases

■ Relationships among SESA components

■ How SESA logs an event

See "About using graphics in Symantec documentation" on page 49.

Entity declarations

This chapter includes the following topics:

■ About using entity references for variables

■ Valid values for entity definitions

About using entity references for variables

You may need to use variables for product names or other non-translatable text. For example, if the same topic applies to multiple products, you can write one section that uses a variable for the product name. Then, in each deliverable book, a different product name can be defined for the same variable so that a single section can be used in multiple product deliverables. You can also redefine a variable for each profile in a single, profiled deliverable.

In Vasont and XMetaL, variables are handled by entity references. An entity consists of a variable name and definition.

Warning: Entity references are never localized. Entity references always appear in English in a localized document. Only use entity references for product names or other terms that are not localized.

See "Valid values for entity definitions" on page 56.

To use entities, you do the following:

■ Create a plain text file that contains one or more entities.

■ Add an entity declaration element to the book and import the entity file into the element.

■ Extract a section of the book to XMetaL, where you can insert any entity into the text that is defined in the entity declaration.

Note: If a deliverable is profiled, a profile entity declaration element must be added to a deliverable for each profile. The name of the profile entity declaration should be the same as the name of the profile, as defined in the Edition element. The syntax of the entities is the same in entity files and profile entity files.

Valid values for entity definitions

All entity values must consist of non-translatable text only. Entity references are never localized. Entity references always appear in English, even in localized documents.

Figure 7-1 shows part of a document that has been localized in Chinese. The product names, Mail Security and Microsoft Exchange, should appear in English. The phrase "an active/passive" should be translated, but this phrase was in an entity reference and could not be translated.

Figure 7-1   Example of proper and improper use of entity references

若要在群集环境中安装 Mail Security，请执行下列操作：

■ 确保环境满足安装前要求。
请参见第 44 页的"在 Microsoft Exchange 群集中安装前的注意事项"。

■ 使用群集配置过程安装 Mail Security。
请参见第 45 页的"关于在具有一个或多个被动节点的群集中安装 Mail Security"。
请参见第 46 页的"在主动/主动群集上安装 Mail Security"。

■ 如果仅使用 an active/passive 配置，请配置群集资源。
请参见第 46 页的"配置群集资源"。

Valid uses of entities include the following types of non-translatable terms:

Product names	For example: Norton Internet Security, DB2, Symmetrix
Company names	For example: Symantec, Oracle, IBM
Operating system names	For example: Linux, Solaris
	Do not include the phrase "operating system" in the entity itself. This phrase is translatable.
Version numbers	For example, 5.0, 5.1, 6.0
	Do not include the word "version" in the entity itself. This word is translatable.

Entity values must be singular, not plural.

Entity values must not use the possessive case, either as part of the entity value itself or by appending an entity with an "apostrophe S" to make it possessive. You can always write around the possessive case.

Entity values can consist of more than one word, as long as all of the words describe a single, non-translatable name: for example, Veritas Cluster Server.

If a product name contains a preposition, the preposition may require translation: for example, the preposition "for" is translated in Symantec AntiVirus for Client & Server.

If you are not sure whether portions of a product name are translatable, contact your InfoDev manager or the product manager.

See "About using entity references for variables" on page 55.

Index entries

This chapter includes the following topics:

- About indexing in a topic-based publishing model
- Guidelines for creating index entries
- Best practices for structuring index entries
- Style conventions for index entries
- About see and see also references in index entries
- About double-posting index entries
- About the difference between double-posts and see references
- About reviewing an index in a deliverable

About indexing in a topic-based publishing model

In our topic-based writing and publishing paradigm, you index topics, not books. Every topic that you write should include index entries. Whenver you extract a deliverable output that generates an index, the index entries in each topic are consolidated into a single index for that deliverable.

Keep in mind the following best practices:

- Always add an adequate number of index entries to each topic. Do not assume that a topic will never be used in an output that includes an index.

- Make indexing a part of the process of writing and updating a topic. Do not wait until the last minute to add index entries to your topics. Never consider a topic to be ready for publishing or translation until it has been indexed.

- Always follow best practices for structure and terminology to help ensure consistency.

See "Guidelines for creating index entries" on page 60.

- If you use profiling, consider whether an index entry should appear only in a particular profiled output. If so, make sure that you add the index entry to an element that has the correct condition applied.

- Review the compiled index in your deliverables to ensure that structure and terminology are used consistently.
  See "About reviewing an index in a deliverable" on page 65.

See "About topic-based writing" on page 6.

Guidelines for creating index entries

Always index your topics as you write and revise them. Ask yourself the following questions when you create an index entry:

- Would someone look up this word in the index?

- Is this term a useful entry?

- Are there several ways to list the items?

- Might a user look for this term under another name?

To help you answer these questions, use the following guidelines:

What to index	Add index terms that lead the user to the following types of information: ■ Key concepts ■ Main tasks ■ Main topics of paragraphs ■ Main features of a product ■ Specific, highly technical information

When to index synonyms	Consider what terms your users may look for in the index to find that information. In your documentation, you should consistently use the same term for a particular concept or task. But in many cases a user may be more familiar with a synonym for that concept or task. You need to consider the user's choice of terminology and knowledge of the subject matter.

For example, you have topics about the database queries that your users can make. If many users are likely to think of queries as searches, you can use double-posting or a see reference to index this information under both terms.

See "About double-posting index entries" on page 64.

See "About see and see also references in index entries" on page 63.

How to structure index entries	Put terms that users are likely to look for first in primary entries. Use secondary entries, when necessary, to provide the detail that differentiates the entries from one another in the compiled index. Avoid using tertiary entries whenever possible.

See "Best practices for structuring index entries" on page 62.

What not to index	■ Terms mentioned in passing Do not index a term when it is only mentioned in passing. Only index a term where substantive information about the term is included in the topic. Users want information, not a list of all the places where words or phrases are used. ■ Product names (in most cases) Do not routinely index concepts and tasks as secondary terms under the product name as the primary term. All of the index entries relate to the product by implication. Index a product name only if the topic discusses the product at length. For example, topics such as Introducing *product name* and Components of *product name* are good candidates for index entries with the product name as the primary. If you use an entity for the product name, also use the entity in the index entry. In this way the correct product name appears in the index of all outputs.

See "About indexing in a topic-based publishing model" on page 59.

See "Style conventions for index entries" on page 62.

See "About reviewing an index in a deliverable" on page 65.

Best practices for structuring index entries

Use the following guidelines to structure your index entries:

Assigning terms to primary or secondary entries	Primary entries should contain the terms that users are likely to look under first. Secondary entries, or subentries, when used, are located under the primary and provide the detail that differentiates the entries from one another in the compiled index. For example, under the primary entry "policies," an index has the secondary entries "about," "adding," and "viewing."
	When you index a concept, never use a term such as "about" as the primary entry. A user is not likely to look in an index under "about" or "introduction." The user is likely to look under the thing itself, for example: policies, about.
Avoiding tertiary entries	Avoid using tertiary entries unless necessary for clarity.
Indexing tasks	In most cases, index a task under the object of the task. For example, for a topic about adding policies, create an index entry with "policies" as the primary and "adding" as the secondary. A user who wants to know how to add a policy is most likely to look in the index under policies.
	There may be exceptions when a task is specific and central to the purpose of a product. For example, you think that many users are likely to look under scanning rather than the object of the scan. If so, create an additional index term that starts with scanning, such as "scanning disks." Use your best judgment, and double-post or add a see reference whenever applicable.
	Be as specific as possible about the term that you choose for the task. Avoid the word "using" when possible. Instead, use a more specific term such as "installing" or "viewing."
Using prepositions appropriately	Use prepositions in subentries only when they are necessary to clarify relationships. If possible, avoid using a preposition at the start of a subentry.

See "Guidelines for creating index entries" on page 60.

See "Style conventions for index entries" on page 62.

See "About reviewing an index in a deliverable" on page 65.

Style conventions for index entries

Use the following style conventions when you create an index entry:

Capitalization	Use lowercase for index entries unless the word is a proper noun or an acronym. Match the capitalization that is used in the text of the topic when the term does not begin a sentence. For example, a wizard called the "Add Policy Wizard" is capitalized in the text, so the index entry "Add Policy Wizard" is also capitalized. However, the index entry "policies, adding" is not capitalized.
	See "About capitalization" on page 10.
Hyphenation	Follow the same conventions that are used in the text. If a term is hyphenated or solid in the text, use the same form in the index entry.
Singular and plural forms	Use the plural form for most index entries. For example, use "policies" rather than "policy." Do not use both the singular and the plural form of the same word as separate entries. A plural form should never be formed by adding the letter 's' in parentheses. For example, do not use "agent(s)."

See "Guidelines for creating index entries" on page 60.

About see and see also references in index entries

See and see also references are used as follows:

See	A see reference is a cross-reference from an index entry to a preferred index entry. See references enable users to find items quickly, using whatever words come to mind during their search.
	See references are typically used for the following:
	■ Generic words that have more specific terms in Symantec products
	■ Terms that are deprecated by Acrocheck but that users may look for (for example: quit. See exit)
	■ Terms that are more commonly identified by their acronyms (for example: small computer systems interface. See SCSI)
	■ Generic interface components that have specific counterparts in the product (for example: dialog boxes. See entries of specific dialog boxes)
	A see reference is particularly useful when a concept is indexed multiple times, with different subentries. If you use a single see reference for each alternate term, you avoid having to double-post (invert) each alternate term with all of its subentries.
	See "About the difference between double-posts and see references" on page 64.

See also   A see also reference is a cross-reference from one index entry to a related index entry. Each entry can be independent of the other, or one entry can be related to the other. For example: device protection. See also antivirus protection

See "Guidelines for creating index entries" on page 60.

About double-posting index entries

Double-posting is the process of indexing the same concept twice, using different terminology or phrasing in each entry. Double-posting is also known as inverting. A typical example of when to use double-posting is when a concept is indexed as two words, and one word modifies the other. In this case you can invert the words and index the concept a second time. This inversion creates an entry for each.

The following is an example of a type of double-posting:

```
administrator role
manager role
role
  administrator
  manager
```

Use double-posting when it benefits the user. Consider what terminology your users are likely to use to find a concept in an index. In some cases you should use a see reference instead.

See "About the difference between double-posts and see references" on page 64.

See "About see and see also references in index entries" on page 63.

See "Guidelines for creating index entries" on page 60.

About the difference between double-posts and see references

Double-posting differs from using a see reference as follows:

Double-post   A user is led directly to the topic from either index entry.

See reference   A user is led from the see reference to the other index entry.

Use a see reference when you have a one-to-many relationship; that is, when the single see reference points to another term that has multiple subentries. For

example, you create multiple index entries with "SMTP" as the primary entry. You want to ensure that users who look up this concept under "Simple Mail Transfer Protocol" can also find the relevant index entries. In this case, you use a see reference for "Simple Mail Transfer Protocol" that points to "SMTP."

See "About see and see also references in index entries" on page 63.

See "About double-posting index entries" on page 64.

See "Guidelines for creating index entries" on page 60.

About reviewing an index in a deliverable

You should review the compiled index in each deliverable to determine if any changes are needed. Then any necessary changes are made to the index entries in source. To view a compiled index for a deliverable, you must extract the deliverable. The deliverable must include an index element.

Use the following guidelines when reviewing an index:

- Check the main entries for consistency in word usage and style.

- Check the entries for duplication due to differences in capitalization or the use of both the singular and the plural forms.

- Check the see and see also references to make sure that the referred location is correct.

- Ensure that any synonyms that are used are expressed in the most understandable form for the user.

- Check each subentry to determine whether it should also appear as a primary entry in noun form.

Also keep in mind that you do not modify the structure of an individual index entry based on how it appears in any one deliverable. For example, you have the following index entry:

```
policies
  viewing
```

In a traditional publishing environment, in a published index, the primary index entry ("policies") should have more than one subentry ("viewing"). If you discovered that a primary had only one subentry, you deleted the subentry and revised the primary entry. For example:

```
policies, viewing
```

But in our topic reuse paradigm, an index entry may have one subentry in one output, and multiple subentries in another output. It depends on the combination

of topics that are included in each. So in our system, it is acceptable for an index entry to have one subentry in any particular index. Otherwise, you might end up with the following set of entries in an index in another deliverable:

```
policies
  about
  adding
policies, viewing
```

See

Symantec standardized terminology

This chapter includes the following topics:

- About standardized terminology at Symantec

- About collecting and submitting terms for standardization

- Creating a standardized term

About standardized terminology at Symantec

Symantec uses a set of standardized terms for its product interfaces and documentation. These terms are maintained in a term bank. We use the acrolinx IQ Terminology Manager to manage the terms in the term bank.

Symantec uses standardized terminology to meet the following goals:

- Reduce translation costs by enforcing a "one concept, one term" approach.

- Enhance the customer experience by promoting consistency of terminology across Symantec products and documentation.

By maintaining a centralized standardized terminology list, we realize the following benefits:

- Consistency of terminology across Symantec products

- Compliance with the Symantec branding guidelines and standards

- Avoidance of duplicate terms in the standardized terminology list

The term bank comprises product-specific terms that serve the following purposes:

- The writers run acrocheck to compare the terminology in their English source content with the terms in the term bank, and invalid terms are flagged.

■ The Localization (GLS) team synchronizes the term bank with their symTD terminology database, which they use to train the machine-translation engine and prepare vendors.

The following types of terms are generally included in standardized terminology:

■ Brand names, feature names, names of utility programs

■ Technical terms that describe processes, actions, and functions

■ Some high-frequency acronyms

The following types of terms are generally not included in standardized terminology:

■ General dictionary vocabulary

■ General software options (names of UI elements), UI strings

■ Generic terms, noun compounds, single adjectives, plural forms

Each term in the term bank is assigned a status of preferred (permitted for use in content), deprecated (not permitted), or admitted (permitted under certain circumstances). If you use a term in your content that is not a preferred term, the preferred alternative is suggested when you run acrocheck.

Terms that appear in the glossary collection are a subset of standardized terminology. That is, terms that are used in product glossaries must first exist in the term bank for use in other content.

See "Creating a standardized term" on page 71.

About collecting and submitting terms for standardization

InfoDev maintains the list of standardized terms for Symantec. You can submit candidate terms for standardization by using the standardized terminology process. During the standardized terminology process, a writer, editor, or term expert (term admin) on the product team submits candidate terms for review by Localization (GLS) and the core admins.

The following groups or individuals typically submit terms:

■ InfoDev teams

■ Editors

■ Terminology group members (term admins and core admins)

■ Localization team

- UI teams or coordinator

- User Centered Design (UCD) team

- Developers

- Product managers

Terms are collected at the following points in the product life cycle (PLC):

- Early in the PLC, to make them available to writers for the remainder of the PLC

- Throughout the PLC, as writers use terms that have not been previously harvested and that may cause false-positive errors in acrocheck

- After the final deliverable is published, to collect any additional terms that may have been added

Table 9-1 provides detailed information about each phase of term collection during the PLC.

Table 9-1 Phases of term collection during the product life cycle

Phases	Steps
Phase I: Initial standardized term list	For projects with no previous term harvesting, the following steps are performed: ■ Term admins send client keys for existing deliverable .xml files to core admins. ■ Core admins run Aslan on .xml files and send resultant report to term admins. ■ Term admins analyze terms and enter them into the acrolinx IQ Terminology Manager (term bank). ■ Term admins and writers analyze project design documents for new terms and enter them into the term bank. ■ Term admins notify terminology distribution list (DL-ENG-InfoDev-Terminology) that standardized term list is complete. ■ Core admins and Localization (GLS) synchronize the term bank with symTD (Localization database). For projects for which terms have been harvested previously, the following steps are performed: ■ Writers run acrocheck on design documents and other available specifications. ■ Writers produce standardized terminology list from design documents. ■ Writers submit standardized terminology list to term admins. ■ Term admins analyze terms and enter into the acrolinx IQ Terminology Manager (term bank). ■ Term admins notify terminology distribution list (DL-ENG-InfoDev-Terminology) that standardized term list is complete. ■ Core admins and GLS synchronize term bank with symTD (Localization database).

Table 9-1   Phases of term collection during the product life cycle *(continued)*

Phases	Steps
Phase II: Terms collected throughout product life cycle	The following steps are performed as content is created or updated: ■ Writers run acrocheck. ■ For false positives, writers submit terms to their term admins. ■ Term admins analyze terms and enter them into the acrolinx IQ Terminology Manager (term bank). ■ Core admins review new terms in term bank on regular basis and notify GLS after each review. ■ GLS synchronizes the term bank with the Localization database (symTD).
Phase III: Terms harvested by Localization (GLS)	At the end of each project, GLS harvests terms again. GLS sends any new terms back to the term admins to enter into the term bank and complete the term management cycle. GLS uses the harvested term to do the following things: ■ Prepare translation lists. ■ Train machine translation.

Creating a standardized term

A standardized term represents a single concept throughout Symantec. When you want to create or change a standardized term at Symantec, you follow the standardized terminology process. The product editor or the designated term specialist (a term admin) for a product submits terms by adding them to the acrolinx IQ Terminology Manager.

For details about how to add terms to the Terminology Manager, see the *Acrocheck User Guide*, which is linked from the main page of the Infowiki.

Table 9-2   Standardized term creation process

Steps	Description
Step 1	Identify the proposed standardized term. See "About standardized terminology at Symantec" on page 67.
Step 2	Run acrocheck on the term to determine whether it is a deprecated term.
Step 3	Search in the acrolinx IQ Terminology Manager to see whether the term is already included as an approved standardized term. For information about using the Terminology Manager, see the *Acrocheck User Guide*.
Step 4	Determine whether the standardized term is to be added to a product glossary.
Step 5	Work with the Terminology team to review the term for standardization. You can contact the Terminology team by sending an email message to DL-ENG-InfoDev-Terminology.
Step 6	If your approved standardized terms are to be included in a product glossary, work with the Glossary team to incorporate the terms into the glossary.

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