MASTERING MEANING

TEMPLATE USER GUIDE

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This template user guide explains what this template is, why you must use it, how it will benefit you as a user, and how to use it. It is created for documentation specialists who are intermediate to advanced Microsoft Word users.

The formatting options built into this template should not be tampered with or adjusted in any way. If you have any questions, consult the specialist who developed this template. View the files in this book to see which numbering properties and styles are applied in certain situations.

Note: Familiarize yourself with the guide content before attempting to use the template.

INTRODUCTION

When: Use this template when creating a new document for the company (both for print and web publishing).

What: This standard corporate template contains formatting features designed specifically for use by this company. It includes various customized components (e.g. page numbers, heading, and table styles). It also uses the company's colours. The template ensures all documents communicate professionalism while invoking the brand.

Why: This template has been created to save writers time and make documentation projects easier. There is no need to fiddle, format, or make decisions. The best practices outlined here optimize the visual appeal and organization of information, increasing usability and readability. The template also ensures consistency across documents, by implementing a set of standards all documents adhere to.

How: For organized, formatted content, simply follow the template instructions and use the styles this template document contains for the outlined uses. Just enter your content and follow the established guidelines and styles for various components.

This document is based on the template. It follows the structure and style uses outlined by the template.

WRITING STANDARDS

Refer to the company style guide for writing standards.

PAGE SET UP

This section describes the page layout components of this template.

HEADERS AND FOOTERS

Headers appear at the top of the document. Footers appear at the bottom of the document. Header and footer data is set using the document's master page.

HEADER

The header contains a solid band with the Mastering Meaning logo. Do not adjust the header.

FOOTER

The footer contains a variable for the document name. Variables allow pre-determined document properties to update automatically. The variable works with the Title and Subtitle styles. If you do not wish to add a subtitle, it will just use the Title style. Title your document exactly as you would like the name to appear in the footer. Should you change your mind, update the title and it will update in the footer.

HOW TO UPDATE FOOTER VARIABLE

1. Title your document what you would like to appear in the footer.

2. Apply the Title paragraph style.

3. If you would like to change the title/footer, update your title and the footer will update too.

PAGE NUMBERS

The page number appears in the right corner of the footer. Leave the page number format as built into the template (it contains a variable).

PAGE LAYOUT

The page layout refers to the margins, page size, orientation. This is also where the user can divide their content into columns. This template uses customized margins and column and margin layouts. Use the page layout built into the template.

DOCUMENT FORMATTING

This section explains the colours, paragraph, and character styles that shape the look and feel of this template. It explains what situations to use each style in.

CORPORATE COLOURS

This template has been designed with the custom corporate colours. Do not adjust the colours of any text (headings).

These colours have already been selected and applied to the styles built into this template. If you use the template as instructed in this document, you will not need to select colours yourself. Should you need to apply these colours, they have been created and named in this template.

For your reference, here are the names and RGB codes for the corporate colours. Use these colours (and those that complement them) if you need to add additional elements (such as charts or graphics) as much as possible.

Table 1: Corporate Colour Codes

Colour Name	R	G	B
Corporate Light Green	0	192	196
Corporate DarkGreen	0	153	76
Corporate Light Grey	128	128	128
Corporate Dark Grey	89	89	89

PARAGRAPH STYLES

Paragraph styles refer to the font style, size, colour, and spacing options set for specific heading and body content styles. Use the paragraph designer to access the style built-into this template. The paragraph styles there have been customized specifically for this template. Heading styles have been built to automatically be followed by the Body paragraph style when you hit enter (except the Title style, which is followed by the subtitle style). An example of each paragraph style used in order appears below the list of different paragraph style options.

HOW TO APPLY A PARAGRAPH STYLE

1. Click **Format** > **Paragraphs** > **Paragraph Catalog**.

2. Select the text you wish to apply a paragraph style to (double-click to select a word, triple-click to select a line).

3. Click on the paragraph style you wish to apply.

Note: To see what paragraph styles are already applied, open the Paragraph Designer (CTRL +M). Click within any content and the style name will appear.

HEADING STYLE OPTIONS

Title: Start documents or chapters/sections of a larger document with a Title paragraph style. Also use this style for the title of your lists of figures and tables, your table of contents, and your index. Use this style for the title or name of your document, the first thing you type in the template. The title of this document uses the Title style. The Title style is set to extend across the main column and sidehead column of the page.

Heading1: Use the Heading1 paragraph style after the title of your document (which uses the Title paragraph style). The Heading1 paragraph style defines level

one headings. Use this style to delineate main topic sections throughout your document. These headings appear in the sidehead column of the page layout.

Heading2: Use the Heading2 paragraph style for level two headings. These headings denote sub-sections that fall under your level one (Heading1) topics. These headings appear in the sidehead column of the page layout.

Heading3: Use the Heading3 paragraph style for level three headings. These denote further sub-sections that fall under your level two (Heading2) headings. Use level three headings sparingly. These headings appear in the sidehead column of the page layout.

BODY CONTENT STYLE OPTIONS

There are a number of custom body paragraph styles available for use.

- **Body:** The Body style is the default; when you hit enter after using one of the heading styles, FrameMaker will revert to this style. Use this style for the majority of your content.

    - Body content follows each type of heading (except for Title).

- **Numbered1:** Use this for the first item in a numbered list.

    - Use numbered lists for task topics and numbered-step procedures.

- **NumberedNext:** Use this style subsequent items in a numbered list.

- **Bulleted:** Use this style for bulleted lists (for lists that do not indicate an order).

- **Bulleted2:** Use this style for second level bulleted lists, nested under first-level bullet items.

CHARACTER STYLES

Character styles are used for emphasis. Use them sparingly.

- **Emphasis**: Use emphasis to highlight menu options and commands a user should click in a procedure. See how emphasis is used throughout this template and refer to the company style guide for more details on how to use it appropriately. Do not use emphasis in place of headings, use the appropriate heading paragraph style. Use emphasis instead of Word's built-in bold option in most cases.

- **FrameMaker bold**: Only use FrameMaker's built-in bold option for bold lead-ins. The shortcut is CTRL+B.

- *Term*: Use term to identify terms. Refer to the company style guide for more information. Do not use Term or Word's built-in italics for emphasis.

- **Note:** Use the Note character style in conjunction with the Indented paragraph style to draw attention to important supplementary information that follows your main point or procedure. Use the Indented paragraph

style, then apply the Note character format to the word Note. Only use this for information that needs to be highlighted to get the user's attention. Refer to this guide for examples and see the style guide for more information.

HOW TO APPLY A CHARACTER STYLE

1. Click **Format** > **Characters** > **Character Catalog**.

2. Select the text you wish to apply a character style to (double-click to select a word, triple-click to select a line).

3. Click on the character style you wish to apply.

IMAGES AND TABLES

This section explains how to handle images and tables. All of these components must be accompanied by captions above them. Following the instructions and using the styles in here will ensure captions appear correctly.

TABLES

Two custom table styles have been created for this template. They appear below along with their names and what situations to use each in.

You may add additional rows and columns. Do not create your own tables or change the fonts or colours used. The tables in this template use specific table styles (TableTitle, CellHeading, and CellBody).

CORPORATE TABLE 1

Use this table for the majority of your tables, except for reference content. See the company style guide for more information.

1. Choose **Table** > **Insert Table**.

2. Choose the number of body rows, header rows, and columns to start with (can adjust later).

3. From the Table Format dropdown choose Corporate Table 1. The table below will appear.

Table 2: Corporate Table 1

CORPORATE TABLE 2: REFERENCE CONTENT

Use this table for reference topics and material (like parts and product numbers).

1. Choose **Table** > **Insert Table**.

2. Choose the number of rows and columns to start with (can adjust later).

3. From the Table Format dropdown choose Corporate Table 1. The table below will appear.

Table 3: Corporate Table 2
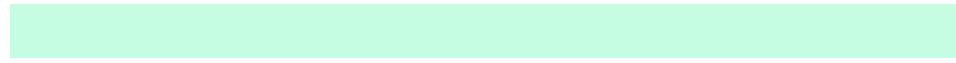
IMAGES

Save images for use in your documents in the same folder as your document as a best practice. Ensure images are at least 72 DPI for web publishing and 300 DPI for print projects. Aim for vector over raster images, as they maintain quality better when resized.

Create images and visual representations using Adobe Illustrator. As a best practice, resize and crop images prior to importing to FrameMaker. See the company style guide for more information on image best practices.

Images should appear on the right with text wrapped around the left edge. Ensure text doesn't run over or directly under images.

Figure 1: Sample image
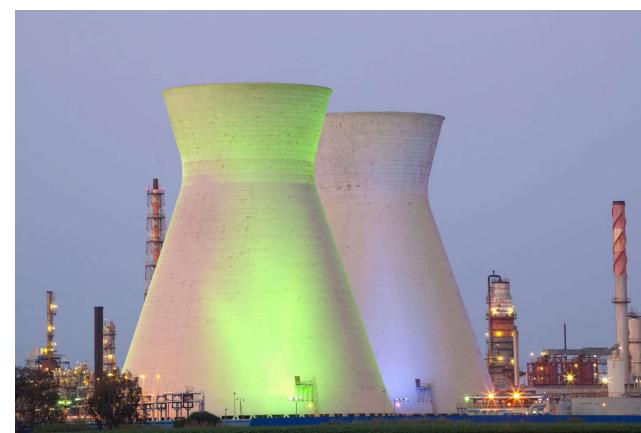
HOW TO INSERT AND POSITION IMAGES

1. Enter an empty paragraph where you would like the image to appear.

2. Apply the FigureImage style.

3. **Insert** > **Image**.

4. Browse to locate the image file on your computer.

5. Choose the DPI to import at.

6. Click **Insert**.

7. Click above the line that came in with your image. Apply the FigureCaption style.

8. Enter the figure caption.

HOW TO RESIZE IMAGES

Try to resize images prior to importing them. If you must resize the image, click the image, grab one of the bottom corners and pull the mouse diagonally upwards to shrink the image. Hit Esc + M + P to shrink the frame to the image.

To crop, click the image and grab the frame where you want to start your crop. Pull it in to where you'd like the image cropped to. Adjust the guides as desired to crop the image.

REFERENCES

This section explains how to create reference components for your document, including a table of contents, index, cross references, footnotes, and lists of tables and figures.

INDEX ENTRIES

To create an index, you must mark index entries throughout your document and then generate the index. The process for both is outlined below. For more information on how to determine what entries belong in your index, see the company style guide.

HOW TO MARK INDEX ENTRIES

1. Highlight a word you would like to appear in the index.

2. **Insert** > **Marker**.

3. In the dropdown for Marker Type, select Index.

4. Click **Create**.

HOW TO GENERATE AN INDEX

1. **Insert** > **Standard Index**.

2. A dialog will ask you if you wish to create a standalone index. Click **Yes**.

> **Note:** To group the index document with your main document you need to generate a book. Clicking Yes will create the index and place it and your main document into a book automatically.

3. Scroll down the column on the right. Select **Index**.

4. Click on the arrow pointing left to add the Index selection to the list of entries to include in the index.If you wish to change the wording of the entry in the index, enter what you would like to appear in the Marker Text box. Otherwise, leave what appears based on the word you high-lighted.

5. FrameMaker will generate the index as a separate document and create a new book file with it and your main document in it.

6. Add the title INDEX using the Title style.

7. **File** > **Save Book As**. Name your book file.

8. To update the index, update the book file. The update icon appears in the book panel.

CROSS REFERENCES

Use cross references to refer to related points and information within the same document. The creation process is similar to creating index entries. The company usually only uses cross references in longer documents. See the company style guide for more information.

> **Note:** When creating cross-references, only choose headings (or table or figure captions). If you choose a word in a paragraph, the whole paragraph will appear when the cross reference is inserted (unless you choose to only include the page number). Company practice is to include the heading or caption text as well as the page number.

HOW TO CREATE A CROSS REFERENCE

1. **Insert** > **Marker**.

2. Select **Cross-Ref** from the Marker Type dropdown menu.

3. Click **Create**.

HOW TO INSERT A CROSS REFERENCE

1. **Insert** > **Cross-Reference**.

2. From the Format dropdown, select

3. Select the Cross-Reference Marker you desire from the list.

4. Click **Insert**.

FOOTNOTES

Use footnotes for reference information, citations, and lengthy side notes required directly on the document page (as opposed to at the end via endnotes or formal references page). Leave all of FrameMaker's default settings for footnotes. See the company style guide for more information on when to use footnotes.

HOW TO INSERT A FOOTNOTE

1. Click where you would like the footnote number to appear.

2. **Insert** > **Footnote**.

3. The footnote will appear at the bottom of the page. Enter the information you would like to appear in the footnote.

Generate lists of figures, tables, and table of contents for larger documents when you are done writing your content. You may wish to generate your Table of Contents earlier on in the process and update it as content changes.

CONTENTS

Generate a Table of Contents for all documents longer than five pages. Refer to the company style guide for more information. Follow the instructions below to create your table of contents. Do not choose other settings.

HOW TO GENERATE A TABLE OF CONTENTS

1. Click where you would like the table of contents to appear in your document. This should be after your cover page and before your document content.

2. **Insert** > **Table of Contents** > **Create Standalone TOC**.

3. Choose **Custom Table of Contents**.

4. Leave the default inclusions (Heading1 and Heading2) and leave Hypertext links checked off.

5. Click **OK**.

6. Add the title CONTENTS using the Title style.

LIST OF TABLES AND FIGURES

Generate a List of Figures and/or Tables for documents longer than 10 pages that contain more than five images and/or tables. Refer to the company style guide for more information. Follow the instructions below to create your List of Figures. Do not choose other settings. Generating these documents is very similar. Like the

index and TOC functions in FrameMaker, they will be generated as separate documents you should add to your document's book file.

HOW TO GENERATE A LIST OF FIGURES OR TABLES

1. **Insert** > **List of Tables** (or Figures).

2. When asked whether you would like to create a standalone TOC or not, click **Yes**.

3. Choose the text you used for the captions for your tables or images. Select which list you would like to generate and use the arrow to add it to the list on the left.

4. Click **OK**.

5. Add the title LIST OF TABLES or LIST OF FIGURES using the Title style.

Note: Tables= TableTitle, Images= FigureCaption. This Template has special coding in the Reference pages to ensure these lists will be formatted properly (font, colour, tab leaders between entries and page numbers). If for some reason the tab leader does not appear, place your cursor between the entry and the page number and hit the tab key.

NUMBERING BOOK FILES

If your document has a generated Table of Contents and list of figures/tables, and/or an index to be grouped in a book file, make sure you set the document numbering properties correctly for all your book files.

1. View the files in the book panel.

2. Right click the **TOC** > **Numbering**.

3. **Page** > set **First Page #** to 0.

4. Click **Set**.

5. For each of the remaining files, repeat this process, but set the page numbering to **Continue Numbering From Previous** in book.

6. Update and save the book.

LIST OF FIGURES

LIST OF TABLES

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