Managed Objects v1.29

Writer's Guide

For Use with Template Version 1.15

managed objects™

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Revision: Managed Objects Writer's Guide Version 1.29

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Revision History

History of Revision

Version	Description of Changes
20	Added information about or requirements to: ▪ Use tooltip as a single word ▪ Use menu bar, status bar, and title bar as two words ▪ Use alphabetic characters followed by a hyphen for appendices ▪ Added the Bolding Conventions section and added information about using bold to the Terms Used in Step-by-Step instructions and Buttons and Icons sections ▪ Updated description of panes in Terms Used in Step-by-Step instructions ▪ Refer to confirmation and information windows as dialogs and use opens to refer to their display ▪ Included information on confirmation and information dialogs in the dialog-box section of the Terms Used in Step-by-Step instructions section
21	▪ Updated the Bolding Convention section. ▪ Added a rule to capitalize all severity codes in the Capitalization Conventions section.
22	▪ Changed title of Revision History ▪ Changed capitalization of Business Service Views on p. 33 ▪ Updated copyright year on Copyright page and p. 32 ▪ Removed all possessive forms of Objects’
23	▪ Update trademark information ▪ Changed “a” to “an” on p. 35 ▪ Clarified how to write conclusion of step-by-step instructions in Step-by-Step Instructions section
24	▪ Updated use of the term “button” on p. 24 ▪ Corrected inconsistency about using “in” to refer to a section ▪ Added Toolbar Buttons row to table “Standards for Referring to Command Buttons and Mini-buttons” on p. 26 ▪ Added Automatically / Dynamically to the table of terms in the Standard Vocabulary and Use of Terms section and sorted the table alphabetically
25	▪ Correct three typos
26	▪ Updated the Standard Vocabulary section for View Builder and PortalBuilder ▪ Remove unneeded 3rd party copyrights from copyright page template ▪ Update the name of the Administrator’s Guide from System Administration Guide
27	▪ Added chapter, Preparing Documents for Publication

History of Revision

Version	Description of Changes
28	▪ Revised the documentation listing to combine the Formula and ORB Install Guide into one document ▪ Updated cover page to remove the formula logo, change version to “v”, remove “Managed Objects” from a document title ▪ Corrected description of click on document convention ▪ Inserted information on variables in Technical Writing Requirements chapter ▪ Updated the system for evaluating issues for Release Notes
29	▪ Remove references to Formula from standard content (ch. 5) ▪ Added References to Products and Product Features ▪ Added new chapter Online Help ▪ Added

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1

About this Writer’s Guide

This Managed Objects Writer’s Guide is intended for use and reference by Managed Objects technical writers who develop, format, review, or edit technical documents.

This chapter contains the following topics:

Introduction

Template

Page Setup

Language Used

Documentation Archive

Checking Out Documents for Editing

Introduction

This Writer's Guide documents the formatting and language requirements for Managed Objects technical documentation. All technical documents produced use this Writer's Guide to ensure consistency and ease of use throughout the Managed Objects technical documentation. The following sections describe the chapters contained in this guide.

Template

This Writer's Guide describes the template used to format Managed Objects technical documents. Managed Objects documents use a Word template that contains the styles used throughout the documentation. The template contains the styles that are used to automatically format all document contents.

Using Styles

Styles that are retained in the template contain the exact format requirements for each type of content used in documents. Chapter 2 lists all styles and their format characteristics.

Template Naming Convention and Versioning

Each time a change is made to the template, a new version is saved. The template file name is: MO Template VX.X where X.X indicates the template version.

Page Setup

The template does not establish the overall page setup requirements that control the margins. Instructions for using Word's Page Setup feature are included in this Writer's Guide. See Page Setup Requirements.

Language Used

The use of a consistent vocabulary and language style helps users understand the application and consistently execute the procedures. This Writer's Guide establishes the language style used for technical documents. See Technical Writing Requirements.

Documentation Archive

Managed Objects technical documentation archive is retained at:

Filebank\Development\Product Documentation

Templates for technical documentation are retained at:

Filebank\Development\Product Documentation\DOCS - Templates

Screen snaps and original diagrams are also retained in the archive.

Graphic Files

When possible, graphic files comply with the following guidelines:

- Use the GIF file format for graphics.
- Graphics are named to describe dialog or topic to which they relate.

- Graphics are saved in folders that indicate the document or product in which they are used.

Checking Out Documents for Editing

Before editing a user guide, it is important to check out the latest copy from the trunk or the associated branch in Subversion. Normally, the trunk is used for the next major release; however some changes may need to be made on a branch for a patch or minor release. Determine if a tag is necessary when checking out files from Subversion. A branch is specified using a tag when the file is updated.

For more information about Subversion, see http://lurch.mosol.com/twiki/bin/view.

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Using the Template

This chapter describes the Managed Objects template, defines the styles used to format all content, and provides instructions for applying the template styles to content and attaching the template to documents.

This chapter contains the following topics:

Template Styles

Attaching a Template to a Document

Maintaining Styles in a Document

Correcting Errors in MS Word

Template Styles

All content in a document is assigned a style stored in the template. The following table lists all styles available, the format characteristics of each style, and the content to which the style is applied.

Managed Object Template Styles

Style	Format Characteristics	Content Type
Body Text	Arial 10pt., Space Before 6 pts., Space After 6 pts.	Paragraphs use style Body Text. To bold words within a paragraph, use the **Bold** icon. No separate style is used for **Bold Body Text.**
Callout	Arial Bold 9 pt.	Apply to text or other characters that are outside paragraphs. Callouts are frequently used to point to sections of a graphic. Right justify callouts as needed on the left side of graphics.
Chapter List	Arial 10 pt., Bold, Underlined, Color – Indigo, Space After 6 pt.	After the introduction to each chapter, a list of all Heading 2 subjects is listed using the Word Hyperlink – Bookmark feature. Apply the Chapter List style to the hyperlink bookmarks.
Chapter Number	Arial 48 pt., Shadow, Centered in 1”X1” table with Blue/Gray shading and border with dashed line 2 ¼ pts.	At the top of each chapter page, the number of the chapter is inserted in a text box. Use Chapter Number to format the number.
Code	Courier New 10 pt., top, bottom, left, right borders Single Line, Gray 50%, Border Spacing 1 pt.	Use Code to format computer code that users enter or that displays on a user interface.
Copyright Content	Arial 9 pt.	Standard copyright text is listed after the cover page of each Managed Object document. Use Copyright Content for paragraphs.
Copyright Heading	Arial 9 pt. Bold	Certain headings within the standard copyright information presented in Managed Objects documents are listed. Use Copyright Headings for the standard headings used to separate the copyright information.
CP – Doc Title	Arial Narrow 36 pt., Bold, Color – Indigo, Flush Right, Space Before – 12 pt., Border – Top: Dashed (small gap), Border Spacing 1 pt	Use CP Doc Title to format the document title on cover page. This style includes a dashed line that displays above the title. If the document title requires more than one line, do not use the enter key to move part of it to a new line because this will cause the dashed line to repeat. Press <Ctrl Enter> to move part of the title to a new line.
CP – URL	Arial Narrow, Color – Gray 50%, Flush Right	Use the CP – URL style for the Managed Objects web address on the cover page.
CP – Version	Arial 14 pt., Color – Gray 40%	Use the CP – Version style for the version number that displays on the cover page. Use spaces to separate the Formula logo from the version number so that the version number is right justified.
Footer	Body Text with Bold and Italics, Color – Indigo, Flush Right, Space Before 6 pt.	Text in the footer that displays automatically using the Word Field Insert feature is formatted using the Footer style.
Gutter Text	Arial 9 pt., Color – Indigo, Border Top and Bottom – Dotted, Light Blue, ¾ pt. Lind Width, Border Spacing 1 pt.	Gutter Text is used to format text in text boxes that display in the left margin. Gutter Text is used to emphasize brief points throughout the documents.

Managed Object Template Styles

Style	Format Characteristics	Content Type
Heading 1	Arial Narrow 24 pt., Bold, Shadow, Flush Right, Line Spacing 1.5 Lines, Space Before 6 pt., Space After 90 pt., Keep with Next, Level 1, Tabs: 1”	Heading 1 is used for the title of each chapter.
Heading 2	Arial Narrow 18 pt., Bold, Color – Indigo, Space Before 12 pt., Space After 6 pt., Keep with Next, Level 2	Heading 2 is used for the major sections within each chapter. Each Heading 2 is also listed as a hyperlink – bookmark in the Chapter List section on the first page of each chapter.
Heading 3	Arial 12 pt., Bold, Italics, Color – Indigo, Space Before 12 pt., Space After 6 pt., Keep with Next, Level 3	Heading 3 is generally the lowest level used within a chapter.
Heading 4	Arial 10 pt., Bold, Color – Indigo, Space Before 12, Space After 6 pt.	Heading 4 is available for use if needed. It is the lowest level available.
Hyperlink	Arial 10 pt., Underline, Color – Blue	Use the Hyperlink style to identify hyperlinks. Words that end in .com are automatically formatted as hyperlinks.
Illustration	Arial 10 pt., Space After 6 pt.	All graphics that can display between the left and right margins use the Illustration style.
Illustration Caption	Arial Narrow 9 pt., Italics	All graphics are followed by a caption. The caption always begins with the title of the graphic, which is bolded. A sentence can follow the title, but is not bolded.
Illustration Left Indent	Arial Narrow 9 pt., Italics, Left Margin –1”	Graphics that are too large to display between the left and right margins use the Illustration Left Indent style, which moves them to the left one inch. If the graphic is still too large, manually move the graphic farther left.
Index 1	Arial 10 pt., Indent Hanging .2”	Index 1 is automatically assigned to the higher-level index entries.
Index 2	Arial 10 pt., Indent Left Hanging .15”, Tabs 2.25”, right flush	Index 2 is automatically assigned to the lower-level index entries.
List Bullet	Based on Body Text - Arial 10 pt., Indent Hanging .25 “, Space Before 3 pt., Space After 3 pt., Bullets, Keep Lines Together, Bullet No. 167Tabs .25”	The List Bullet style is used to present a list within a paragraph.
List Bullet Indent	Based on Body Text - Arial 10 pt., Indent Left .25”, Keep Lines Together, Space Before 3pt., Space After 3 pt., Bullet No. 167, Tabs .5	For indented lists within a list, use the List Bullet Indent style.
List Bullet Single Step	Based on Body Text - Arial 10 pt., Indent Hanging .25”, Space Before 3pt., Space After 3 pt., Bullets, Keep Lines Together, Tabs .25”	Use the List Bullet Single Step for bullet lists within step-by-step procedures or when there is only one step in a procedure.
List Number	Ariel 10 pt., Indent Left .5”, Hanging .25”, Numbered, Keep Lines Together, Tabs .75”	List Number is used to number step-by-step instructions. Set each list to begin numbering at 1.
List Title	Veranda 10 pt., Bold, Color – Indigo	To begin a step-by-step procedure, use the List Title style.
Note	Arial 10 pt., Color – Indigo, Top and Bottom Border – Dotted Line, Color – Indigo, ¾ pt. Line Width, Border Spacing 1 pt.	The Note style is assigned to information with a paragraph to emphasize it. The information is too long to use the Gutter Text style that is used for text boxes in the left margin.

Managed Object Template Styles

Style	Format Characteristics	Content Type
Page Number	Arial 10 pt., Bold, Color – White, Shading - Blue/Gray, Border – Single Solid Line, Blue/Gray, 4 ½ pt. Line Width	Page numbers in the footer are assigned the page number style. Start with page number 1 on the first page of Chapter 1. The Table of Contents does not have a footer and thus does not have page numbers.
Table Heading	Verdana 10pt., Bold, Space Before 2 pt., Space After 2 pt., Keep with Next	The column headings within a table use the Table Header style.
Table List Bullet	Arial 9 pt., Indent Hanging .2", Space Before 3 pt., Space After 3 pt., Bullets, Tabs .25"	Bullet lists within a table use the Table List Bullet style.
Table List Number	Arial 9 pt., Indent Hanging .25, Numbered, Tabs .25	Numbered lists within a table use the Table List Number style.
Table Text	Arial 9 pt., Space Before 2 pt., Space After 2pt.	Text within a table uses the Table Text style.
Table Text Bold	Arial 9 pt., Bold, Space Before 2 pt., Space After 2pt.	To bold text within a table, use the Table Text Bold style.
Table Title	Verdana 10 pt., Bold, Space Before 0 pt., Space After 0 pt., Keep with Next	All tables are assigned a title that uses the Table Title style.
TOC 1	Arial 11 pt., Bold, Color – Dark Blue, Indent - .5:, Hanging .5", Space Before 6 pt., Space After 6pt., Numbered, Tabs .25", Right Flush	TOC 1 is used to list all Heading 1 topics in the TOC. It automatically numbers each chapter.
TOC 2	Arial 10 pt., Tabs 5", Right Flush	TOC 2 is used to list all Heading 2 topics in the TOC.
TOC 3	Arial 10 pt., Italics, Indent Left .33"	TOC 3 is used to list all Heading 3 topics in the TOC.
TOC Title	Arial Narrow 15 pt., Bold, Color – Gray 40%, Space After 6 pt.	The TOC Title style is used for the TOC heading and the Index heading.

Attaching a Template to a Document

Word stores document templates using the .dot extension. Each time you update the styles in a document template, the styles and associated formatting in attached documents are automatically updated when you open the documents.

To attach a document to a template:

1. Open the document that needs to be attached to a template.
2. From the Main Menu, select **Tools** and **Templates** and **Add-Ins**. The Templates and **Add-Ins** dialog opens.
3. Click the **Attach** button. The **Attach Template** dialog opens and lists the templates available.
4. Select the template you want to attach and click the **Open** button. The **Attach Template** dialog closes.
5. Click to select the **Automatically update document styles** check box to update the styles each time the document opens.
6. Click the **OK** button. The document is attached to the template.

Maintaining Styles in a Document

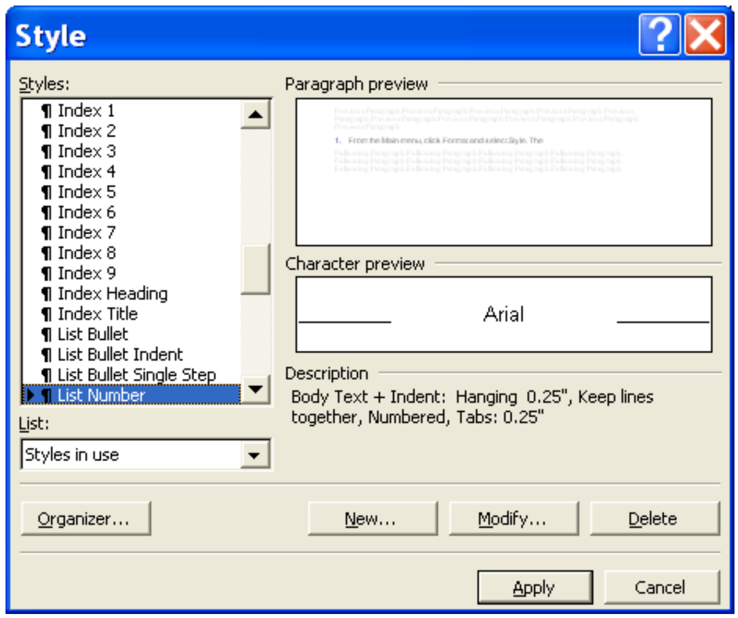
When a document attached to a template is edited, new styles can be inadvertently created. Text that is pasted into a document often contains styles that are not in the template or different formatting parameters for styles. In each of these cases, Microsoft Word automatically creates a new style. These styles are not added to the template. However, these created styles display in the Style drop-down list in addition to the styles from the template. When new styles are inadvertently introduced, you must reassign a style from the template.

To prevent new styles from being created:

1. To prevent new styles from being created you can use one of the following techniques:
   - Convert text from other documents to the **Normal** style before pasting it in
   - Attach the document that contains the text you want to paste in to the template and reassign the appropriate style.
2. Before finalizing a document, remove any new styles created to ensure that subsequent user do not inadvertently use them.

To remove an automatically created style from a document:

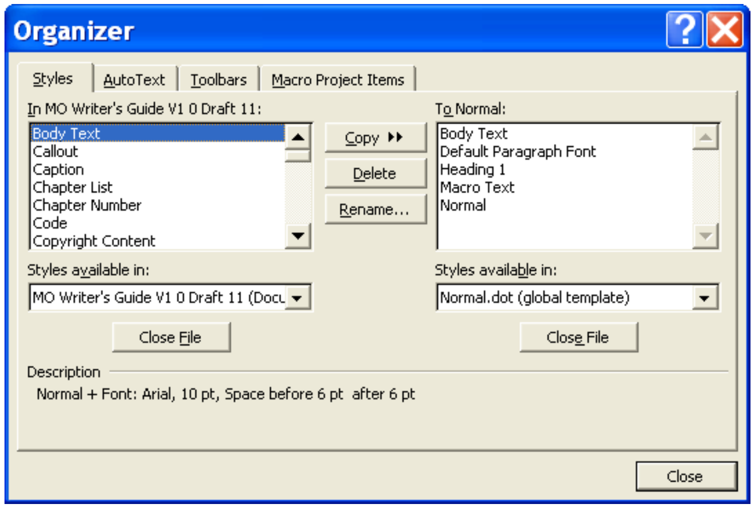
1. From the menu, click **Format** and select **Style**. The **Style** dialog opens.



2. In the **Styles** section, click to select the automatically created style you want to delete. The style you select displays in the **Paragraph** preview and **Character** preview sections.
3. Click the **Delete** button. The style is removed from the **Style** drop-down list. Text in the document that uses the style is re-assigned the **Normal** style.

To remove automatically created styles using the Organizer:

1. From the menu, click **Format** and select **Style**. The **Style** dialog opens.
2. Click the **Organizer…** button. The **Organizer** dialog opens.



3. Click to select the style you want to delete. Use the **Ctrl** key to select more than one style
4. Click the **Delete** button. The style(s) are removed from the **Style** drop-down list.

Correcting Errors in MS Word

To correct errors in a Word document:

1. In Microsoft Word, click **File** and select **Open**. The **Open** dialog displays.
2. Navigate to and click to select the corrupt document.
3. Click the arrow on the right side of the **Open** button and select **Open and Repair**. The document opens in MS Word and the **Show Repairs** dialog opens.
4. Use the **Repairs** list to review the necessary repairs:
   - Click to select the repair and click the **Go To** button. The content is highlighted in the document.
   - Examine any repairs directly associated with the error message received for the document.
   - If a table has errors, examine the **Table End-of-Cell Marker** items. These indicate which tables need to be fixed. Delete the extra row in the table.
5. Save the document.
6. Reopen the document to verify all errors are resolved.

3

Page Setup

This chapter defines the page setup requirements for Managed Objects technical documents.

This chapter contains the following topics:

Page Setup Requirements

Breaks Between Chapters

Chapter Numbers

Appendices

Page Footers

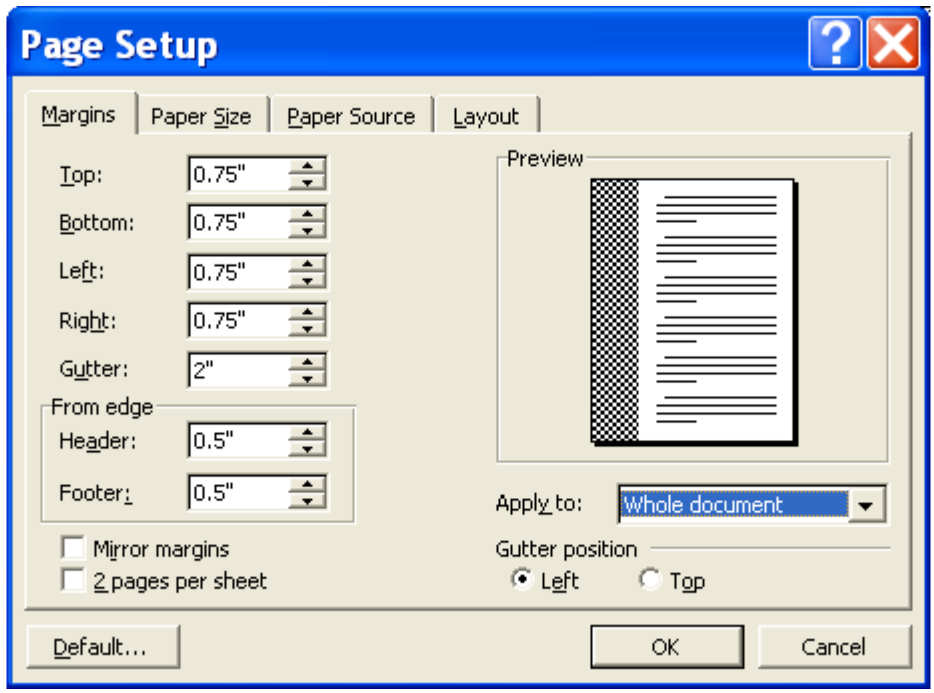
Table of Contents

Page Setup Requirements

Page setup includes establishing document margins and selecting layout options. It is imperative to properly set up a document's pages to ensure that the styles in the template can be properly applied.

Margins

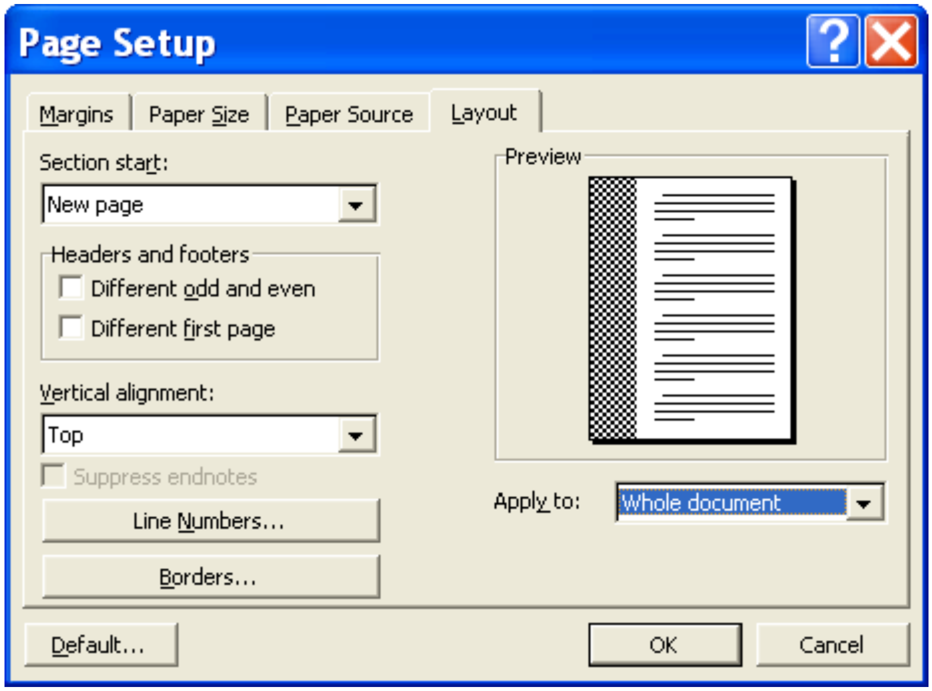
Margins are set at .75" for the top, bottom, right, and left sides of each page. A two-inch gutter is set for the left margin. The Header and Footer margins are set at .5". The graphic below shows the proper settings for a Managed Objects technical document.



Word Page Setup Dialog – Margins Tab

Layout

The **Layout** tab is used to establish special formatting for pages. Managed Objects documents do not require unique formatting for any pages. The graphic below shows the proper settings for the **Layout** tab.



Word Page Setup Dialog Layout Tab

Breaks Between Chapters

Managed Objects use a consistent set of page and section breaks for technical documents. Section breaks are used only when the footer changes from one section to another.

- Insert page breaks after the:
  - Cover page
  - First page of each chapter
  - Last page of each chapter
- Insert section breaks (Next Page) after the:
  - TOC page – This section break is required because the cover page, copyright page, and TOC page do not have a footer. The first page of the first chapter, which occurs immediately after the TOC page, begins the use of a footer.
  - Last chapter of each document just before the Index – This section break is required because the Index is not a numbered chapter and the first half of the footer that refers to chapter number must be removed from the footer.

Inserting Page and Section Breaks

When you insert a page or section break at the end of a chapter a single line is inserted at the top of the next page with the same style as the last line on the previous page. Microsoft Word automatically inserts this line. If you were using a style that has special formatting such a bullet or a numbered list, a bullet or number displays on the first line of the page immediately following the next page. To eliminate the special formatting, change the style of the inserted line to **Body Text**. If you delete the line, the style of the last line of previous page is updated with the style used. The only way to prevent this is to place the cursor on the very first line of the next page prior to creating the page or section break. If there is not subsequent page, you must use the **Enter** key to create enough lines to automatically create a new. For Managed Objects technical documents, insert the page or section break without adding enough lines to create a new page and update the line inserted to **Body Text**.

Chapter Numbers

Number chapters sequentially. The first page of each chapter displays the chapter number in the top right corner in a formatted table. Recording the chapter number in the formatted table allows the automated footer to use the chapter number in the footer.

Record the chapter number at the top of the first page of each chapter as follows:

1. Insert a table with one row and one column.
2. Resize the table to 1-inch width and height.
3. Insert a border around the table using a dashed line with 2 ¼ point weight.
4. Format the background using blue-gray shading.
5. Enter the chapter number in the table using the **Chapter Number** style.

Appendices

Appendices are identified using alphabetic characters beginning with A followed by an hyphen.

Page Footers

The page footers contain the chapter title and the page number. All pages are numbered sequentially beginning with Chapter 1 page 1.

The chapter title is inserted automatically using the Word Insert Field feature.

To insert the Chapter Title in the footer:

1. Open the page footer on the first page of Chapter 1.
2. From the Main Menu, select **Insert** and **Field**. The **Field** dialog opens.
3. In the Categories pane, select **Links and Ref**.
4. In the Field pane, select **StyleRef**.
5. Click the **Options** button. The **Field Options** dialog opens.
6. Select Chapter Number and click the **Add to Field** button.
7. Enter a space, hyphen, and a space.
8. Select **Heading 1** and click the **Add to Field** button.
9. Click the **OK** button. The **Field Options** dialog closes.
10. Click the **OK** button. The chapter number and chapter title automatically display in the page footer separated by a hyphen.

The Index Footer

The Index does not use the entire footer used in the body of the document because it is not given a chapter number.

To modify the footer for the Index:

1. Insert a section break after the last line of text in the last chapter of the document. A new page is inserted.

2. Generate the Index.
3. From the Menu, click **View** and select **Headers and Footers**. The headers and footers on the page display.
4. Delete the word “Chapter” and the spaces and hyphen.

Table of Contents

The table of contents is formatted when it is generated. The chapters are automatically numbered. Generally, the table of contents presents two levels that show Headings 1 and 2. The Index displays as a numbered chapter in the Table of Contents because Heading 1 is formatted as a numbered list. To remove the numbering from the Index, use the **Backspace** key.

4

Technical Writing Requirements

This chapter documents the language, style, and terminology recommended for Managed Objects technical documents.

This chapter contains the following topics:

[General Writing Requirements]

[Standard Vocabulary and Use of Terms]

[Glossary]

[Capitalization Conventions]

[Notes and Gutter Notes]

[References to Sections, Documents, and Files]

[Bulleted Lists]

[Tables]

[Illustrations and Captions]

[Code Samples]

[Step-by-Step Instructions]

[Using Variables in Step-by-Step Instructions]

[Instructing Users to Perform an Action]

[Navigation Text for Step-by-Step Instructions]

[Standard Terms for Step-by-step Instructions]

[Buttons and Icons]

[Referring to Screen and Dialog Components]

[Miscellaneous Items in Step-by-step Instructions]

[Dialog Components]

[Formula Browser Components]

[Wizards]

[Index]

General Writing Requirements

The following general writing requirements are defined to optimize the clarity of technical documents:

- Use the present tense. Do not use will, could, should, or would.
  - Incorrect: The dialog will open.
  - Correct: The dialog opens.
- Use the active voice. The active voice requires that you identify the subject of each sentence.
  - Incorrect: Account privileges are assigned.
  - Correct: The System Administrator assigns account privileges.
- Minimize the use of "you". Do not use "you" in step-by-step instructions unless there is no other way to phrase it. The work "you" can be used in introductory text to explain the role of a user.
  - Incorrect: You click the **OK** button to save the file.
  - Correct: Click the **OK** button to save the file.
  - Correct: The Save button allows you to save the file.
- Use one space, not two, after a sentence and a colon.

Standard Vocabulary and Use of Terms

The following table lists commonly misused words, words for which there are more than one way to spell or punctuate the words, and identifies the standard established for Managed Objects technical documents.

Vocabulary and Use of Terms Standards

Term	Standardization of Term
Automatically / Dynamically	Use dynamically to describe the on-going update of the result of an action. Generally used to describe how Views update.
Log in / Log off	Verb form - *Log in* to Formula.
Login / Logoff	Noun form - Go to the *login* prompt. Use the *Logoff* command.
Menubar / Menu Bar	Use menu bar as two words.
Open / Display	Use open to refer to when a dialog or web page appears. Use display to refer to when a tab or view appears.
PortalBuilder / Portal Builder	Use one word to refer to the PortalBuilder.
Set Up	Verb form - Set up the servers
Setup	Noun form - Use the UNIX environment *setup* described below.
Statusbar / Status Bar	Use status bar as two words.
Taskbar / Task Bar	Use task bar as two words.
Titlebar / Title Bar	Use title bar as two words.
Toolbar / Tool Bar	Use toolbar as one word.
Tooltip / Tool Tip	Use tooltip as a single word.
Type / Enter	When instructing the user to input text, use type. *Type* the following command.

Vocabulary and Use of Terms Standards

Term	Standardization of Term
View Builder / ViewBuilder	Use View Builder as a two words to refer to the feature.
Web	Capitalize the word Web when used as a single word - Web browser, Web, Web site Do not capitalize the word Web when used as part of another word: webmaster

References to Products and Product Features

With version 4.0 of our software, the product name was changed from Formula to Managed Objects v4. This table outlines the various terms that have been used with guidelines for updating them for new terminology.

Product Terminology

Was…	Now use…
Formula	Delete the reference if possible. To refer to the main product, use **Managed Objects software**
Formula server	**server** or **Managed Objects server**
Formula browser	**browser** or **Managed Objects browser**
Organizations	If reference is general term (an element under the **Service Models** hierarchy) use **element**. If reference refers to the root element for the **Service Models** hierarchy, use **Service Models**. (TBD)
Formula Home Page	**Managed Objects server Login page**
FormulaScript	
Formula-to-Formula Adapter, F2F Adapter	For formal references, use **Managed Objects InterCommunication Adapter (ICA)**. For general references in other guides, use **InterCommunication Adapter (ICA)**.

References to Managed Objects

The company name is **Managed Object Solutions**. We commonly refer to the company as **Managed Objects**. This is also correct. Please note when Object has an s at the end and doesn’t. If you want to refer to the solutions that Managed Objects offers, use **Managed Objects’ solutions**.

Glossary

Managed Objects maintains a single glossary that contains terms used throughout all technical documentation. The glossary is incorporated into the Primer. Terms are also defined within technical documents the first time they are used.

Capitalization Conventions

The following capitalization conventions are used throughout Managed Objects technical documents.

- Acronyms - Terms that have acronyms are spelled out the first time they are used in a document with the acronym following in parentheses. For example: Business Experience Manager (BEM). Subsequent uses of the term use the acronym.

- Retain title case capitalization for the following terms, even when they appear in the middle of sentences as regular nouns:
  - Service Level Agreement
  - Operational Level Agreement
- Use title case for capitalization of all headings, table titles, and the names of dialogs or pages in captions. Apply **superscript** to any trademarks or registered symbols.
- Terms that refer to a specific user interface component are not capitalized. The following terms are presented using lower case:
  - administrator
  - adapter
  - agreement
  - calendar
  - daemon
  - health grade
  - maintenance period
  - monitor (as in BEM monitor)
  - objective
  - schedule
  - service (as in Windows service)
  - service level metrics
- Capitalize all severity codes

Bolding Conventions

Use bold to draw attention to any item in general content. For example, use bold for a specific item the user might see or set in the product or in a management system such as severity codes or flags or parameters. Examples of when bold is used include:

- Alarms created by DSM-level objects have a severity of **UNKNOWN** regardless of the criticality of the event being reported.
- All attributes in the SpectroServer tagged with the **logged** attribute are recorded over time.

When referring generically to an item, do not use bold. For example, when referring to adapters in general as opposed to a specific adapter, do not use bold. In the Adapter guide, do not bold the names of management systems and adapters in general content to prevent too much bold text from distracting the reader.

Use bold for the names of user interface components (e.g. dialogs, text box labels, check box labels, filenames, file directories) in step-by-step instructions and general content with the following exceptions:

- Bold the names of views in step-by-step instructions, but not in general content unless you need to draw the reader's attention to them.
- Do not bold Explorer pane in step-by-step instructions or general content.

See Standard Terms for Step-by-step Instructions and Buttons and Icons for specific information about each user interface component.

boxes, which can be positioned in the left gutter. Gutter Notes are placed with the same spacing from the body text. About 2/10th of an inch (two marks) so that the blue dotted boundary lines line up on the right.

Notes and Gutter Notes

Notes and Gutter Notes are used to highlight information. Both styles use top and bottom borders and the Managed Objects logo to draw attention to the information. Notes are inserted within a paragraph and Gutter Notes are inside text boxes in the left gutter.

Use Gutter Notes to highlight brief information that is limited to two or three sentences. Gutter Notes include information that augments the information in the content of the document. Things like Gutter Notes generally include information such as tips, warnings, references, and definitions. Gutter Notes do not begin with a bolded lead in except if announcing something urgent or if information is a tip or warning. When Gutter Notes contain a tip or warning, begin with **Tip:** or **Warning:**.

Definitions in Gutter Notes are defined in full sentences with the word being defined in bold text. Words are defined within the document at the first occurrence of the word and are not repeated.

Use Notes to highlight information within the main text of a document that is longer than two or three sentences. Notes are placed inside a table with two columns and one row. The Managed Object logo is inserted in the first column.

References to Sections, Documents, and Files

References Within the Same Document

When referring to another section within the same document, use the term “See” and use a hyperlink to insert the title of the section. For example:

See Step-by-Step Instructions.

References to Other Documents

When referring to a Managed Objects Guide or other document:

- Cite the reference beginning with the most general or highest level, progressing to the most specific. For example, when referring to a Managed Objects guide, cite the guide, chapter, and section.
- Separate the components; such as a guide, chapter, and section; with a comma.
- Separate a chapter and its name with a colon.
- When referring to another Managed Objects technical document, use the term “Refer” and italicize the entire reference. For example:
  - For more information, refer to the *Administrator’s Configuration Guide*.
  - For more information, refer to the *Administrator’s Configuration Guide, Chapter 5: Building Business Service Views, Adding Elements*.

References to Files and Directories

When referring to a file and the directory structure in which it is located, combines the directory structure and the file name in one string. Do not separate the directory structure and the file name.

  - Correct: The **formula\webapps\download\customCodeSetup.jsp file**.

- Incorrect: The **customCodeSetup.jsp** file in the **formula\webapps\download** directory.

Bulleted Lists

Lists are an effective way of displaying information that cannot be efficiently expressed in a sentence and to separate lists of items. Readers can often quickly scan a list to survey the points mentioned without having to read every word. The following example illustrates a bulleted list.

Use the Bulleted List style within a paragraph to:

- Preview topics
- Summary of reasons
- Assumptions
- Findings
- Secondary steps in a procedure
- Recommendations
- Conclusions

Tables

Tables are used to present information that cannot easily be presented in paragraphs. Tables can describe menu options, feature options, or the components of a user interface. Tables are always right justified against the right margin. Tables can remain justified within the left page margin as shown in the first table below or they can be extended into the left gutter margin to accommodate the information as shown in the second table below. If a table exceeds the left margin, manually adjust the table title to the standard left margin.

The following example of a table identifies the styles used.

Table Title

Table Heading	Table Heading
Table Text Bbreak across pages.old	Use the Table Text style for information.

Table Title

Table Heading	Table Heading
Table Text Bbreak across pages.old	Use the Table Text style for information.

The following format rules apply to all tables:

- Assign all tables a title. Insert the table title into a single cell above the first row without borders or shading. For tables that exceed the left margin, manually align the table title with the left margin.
- Repeat the **Table Title** and the **Table Heading** so that they both display when a table spans more than one page.
- Do not break a long table into multiple tables.
- Do not allow cells to break across pages.

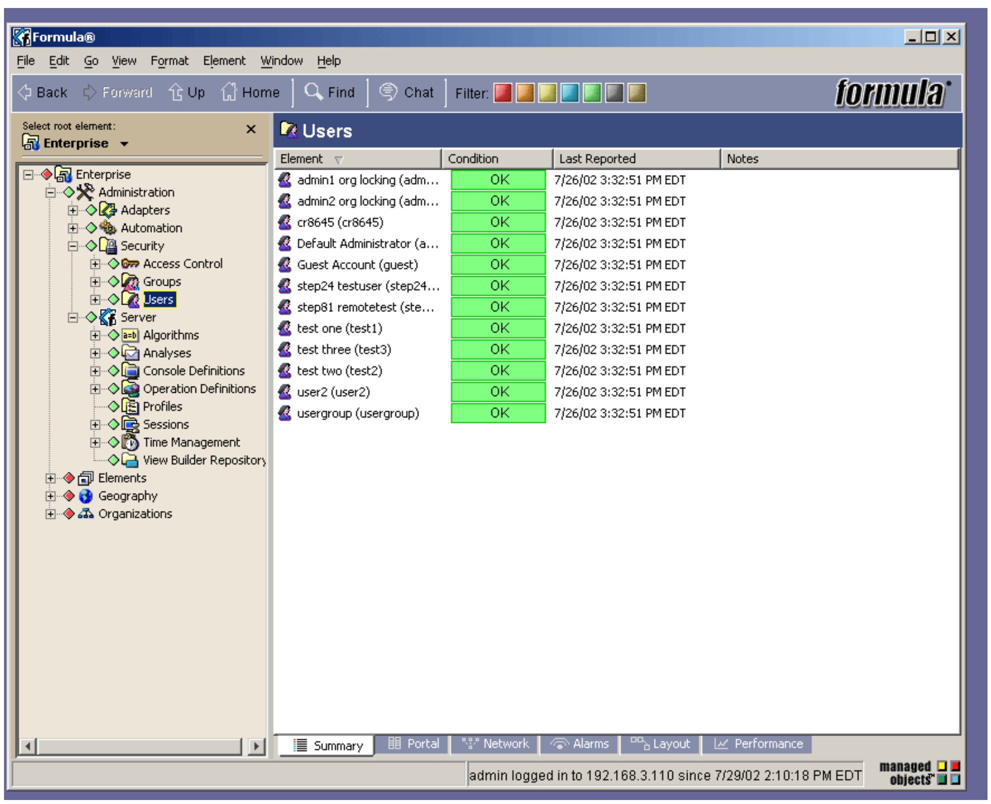
Illustrations and Captions

Illustrations include any kind of graphic inserted in the document such as screen snaps of product interfaces, architecture diagrams, process diagrams, and charts. Use the **Illustration s**tyle for illustrations that can be contained within the margins Use the **Illustration Left Indent** style to move a graphic one-inch to the left. If the graphic continues to exceed the right margin, manually move the graphic left.

If possible, try to restrain illustrations to the left and right margins. If the illustration needs to be smaller in width, align to the left margin. This is especially important for illustrations within step-by-step instructions.

For screen shots captured:

- Use text boxes with the **Callout** style to label and illustrations. Use the left and right sides of illustration for callouts and only use top when necessary.
- Use the GIF file format. GIF files affect document size the least. Save a copy to the Documentation Archive.
- Use **Windows Classic** on your desktop setup.
- Save a copy in the file archive in corresponding release folder.
- Do not place a border around an illustration.
- Assign each illustration a caption using the **Illustration Caption** style. Begin the caption with the title of the graphic in bold. Add additional information after the illustration title and a colon in text that is not bolded.
- Do not use captions on illustrations included as part of a step-by-step instruction.



Users Element: *The Users element in the Administration tree lets you create and managed users. In the Summary View for this element, you can see the list of existing user.*

Code Samples

As we have several developers' guides and need to communicate code to our users, it is necessary that we provide an easy visual way of displaying actual code.

One or two lines of code can be presented using only Courier New text without background shading.

However, when there is a large amount of code you wish to display in the document, use the following style:

```
Code that is one line can be presented with gray shading.
Use Courier New, 10pt font with a 15% gray background/50%
gray border. This format allows the code stands out and
contains the code to facilitate seeing where it begins and
ends.
```

Manually move the left margin for the code text to present the code text so that it is easy to read and understand as shown below.

```
Code that is one line can be presented with gray shading. Use Courier
New, 10pt font with a 15% gray background/50% gray border. This format
allows the code stands out and contains the code to facilitate seeing
where it begins and ends.
```

Step-by-Step Instructions

Use step-by-steps to instruct a user how to perform a task. The following example shows the formatting of step-by-step instructions.

To write step-by-step procedures:

1. Provide a title for the instructions using the **List Title** style.
2. Use the List Number style for the steps.
3. Restart the numbering for each list to **1**.
4. Do not use "or" for alternative ways of performing a step. Introduce alternatives using the List Bullet Single Step style with text such as, "To save a file perform one of the following steps:"
   - Click the **Save** button.
   - Click the **F2** key.
5. Avoid the word "you" in instructions.
6. Identify the result of each step except for when an action updates a view. Use the following terms to describe the results listed:
   - A dialog "opens".
   - A Web page "opens".
   - A tab "displays".
   - A button "activates".
7. State the ending result of completing each set of step-by-step instructions. The ending result is usually related to the purpose of the set of step-by-step instructions.
8. Refer to the series of screens that display in a wizard as dialogs.

9. Always use a menu option/properties dialog as the primary method to accomplish a task and refer to the Portal view as an alternative.
10. Use an embedded table instead of bullets to describe the various selections for an option.
11. Do not use numbered callouts on illustrations instead of numbered steps.
12. Use **Shift+Enter** to insert a new line immediately after a line that continues the style without adding a new paragraph. This is used to insert a line between numbered steps and bullets without inserting a new number or bullet. For example:
    This line was added by pressing **Shift+Enter**.

Using Variables in Step-by-Step Instructions

A variable is data provided that is specific to a installation, user, or procedure. The following table provides examples of variables.

Examples of Variables

Variable Type	Example
Installation	Installation drive and directories
User	User name and password
Application	File name

Following are the format requirements for variables:

- Bold and italicize variables.
- Describe the variable in a list or table.
- If using a table to list variables, use the headings “Replace…” and “With…”.
- Do not use brackets to identify a variable.

The following steps provide examples of how to format variables in step-by-step instructions:

1. Type your ***User Id*** and ***password***.

Replace…	With…
User Id	Your user name
Password	Your password

2. Type **;*drive*:\mos\bin** at the end of the **Variable Value** declaration.
   Replace ***drive*** with the installation drive.

Describing Features Using Toggling Options

A toggling option refers to the capability to turn on and off various features. Toggling options are usually available from menu options, toolbar buttons, or icon buttons. This section provides a set of examples of step-by-step instructions for toggling options for menus, toolbars, and icons. In addition, this section provides examples for instructions that are one of a series of steps (embedded) or when the toggling option is a single step.

Note: The embedded step-by-step examples present the action followed by the result. For example, “From the **Format menu**, click to select **Follow Condition Changes** to automatically track changes in Element state.” In some cases, where there are *many* features presented in the same step-by-step, it may be necessary to invert this format and start with the result before the action. For example, "To dynamically track condition changes, from the **Format** menu, click to select **Follow Condition Changes**."

Toggling from a Menu Option

Toggling options available on a menu place a check mark beside the option label when selected. When deselected, the check mark disappears. Use "click to select or deselect" to describe the action for toggling options available on menus.

Examples of Toggling Options Available on Menus

Example of Embedded Step	Example of Stand Alone Step
1. In the Explorer pane, right-click the background and click to select or deselect **Show non-source element indicators**. When selected, indicators display beside elements that does not contribute to the state of their parents.	To display or hide non-source element indicators: ▸ In the Explorer pane, right-click the background and click to select or deselect **Show non-source element indicators**. When selected, indicators display beside elements that does not contribute to the state of their parents.
1. From the **Format** menu, click to select or deselect **Reverse Alarm History Sort** to sort alarms in chronological, descending order. Alarm sort order persists across client sessions and is unique for each user.	To reverse alarm sort order: ▸ From the **Format** menu, click to select or deselect **Reverse Alarm History Sort**. Alarms sort in chronological, descending order. Alarm sort order is persistent across client sessions and is unique for each user.

Toggling using Toolbar Buttons

Toolbar toggle options are usually implemented with a button that is compressed when selected. However, in some instances, the button graphic is not the same for each setting. For example, a Pause button shows on the Alarms toolbar when alarms are active. When alarms are paused, the button changes to show a Resume button.

Examples of Toggling Options Available as Toolbar Buttons

Example of Embedded Step	Example of Stand Alone Step
1. In the **Filter** section of the toolbar, click to select or deselect the **Filter** button(s) to remove the associated alarms from the view. The selected **Filter** button(s) dim.	To filter alarms based on condition: ▸ In the **Filter** section of the toolbar, click to select or deselect the **Filter** button(s). The selected **Filter** button(s) dim and associated alarms are removed from the view.

Examples of Toggling Options Available as Toolbar Buttons

Example of Embedded Step	Example of Stand Alone Step
1. On the toolbar, click the **Resume** button to resume the receipt of alarms.	To resume alarms: ▸ On the toolbar, click the **Resume** button to resume the receipt of alarms.

Toggling from an Icon Button

Icons buttons, referred to as mini-buttons in development, have gray borders with a small icon in the middle. They are often used inside of dialogs or panels (e.g. Alarm Filter panel).

Examples of Toggling Options Available as Icon Buttons

Example of Embedded Step	Example of Stand Alone Step
1. Click **Show/Hide BSA Off Times** to display or hide a black grid identifying times when BSLM data collection is disabled.	To display or hide the times when BSLM data collection is disabled: ▸ Click **Show/Hide BSA Off Times**. When selected, a black grid displays in the calendar that identifies times when BSLM data collection is disabled.

Instructing Users to Perform an Action

When there are multiple ways to perform an action, do not list all the ways to perform the action. Provide the user the most direct way. For example, if the action can be performed using the element right-dick menu, the portal view, and the **Properties** dialog, instruct the user to perform the action using the right-click menu. If a direct right-click menu is not available, instruct the user to use the Properties dialog.

Using the Portal View

Generally, using the Portal view is not recommended. The Portal view is most useful to the Administrator when they need access to multiple features with one click. Because of this, there will be a new section in the Administrator Guide that speaks how the Admin may leverage the Portal view when globally setting up things.

Navigation Text for Step-by-Step Instructions

Frequently, users make a series of selection to navigate to a specific dialog or page. To present navigation instructions in the most concise and clear way:

- Always state the location from which the navigation begins.
- When navigating within the **Explorer** pane, identify the first selection as an element or root element and list the subsequent series of elements selected without referring to them as elements.

Examples of Navigation Text

To navigate to a specific element:

1. In the Explorer pane, double-click to expand the **Administration** root element, **Security** and **Users**.
2. Right-click **Users** and select **Properties**. The **Properties** dialog opens.

To navigate to a general element:

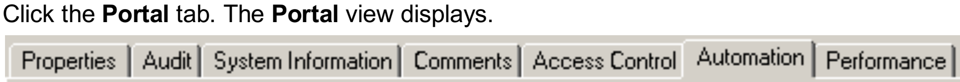
1. In the Explorer pane, double-click to expand the **Administration** root element, **Security** and **Users**.
3. Right-click the element and select **Properties**. The **Properties** dialog opens.
4. Click the **Automation** tab. The Automation tab displays.

To navigate using the Portal view:

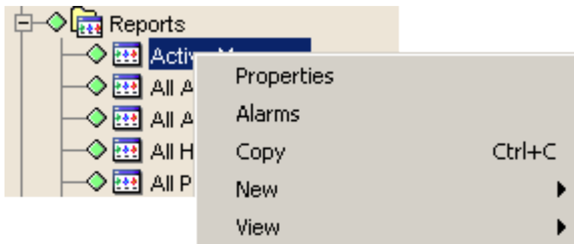
1. In the Explorer pane, click to select the **Administration** element.
5. Click the **Portal** tab. The Portal view displays.
6. Scroll to the **ACTIONS** section.
7. Click to expand the **ACTIONS** section.

Standard Terms for Step-by-step Instructions

Vocabulary and Terminology for Step-by-Step Instructions

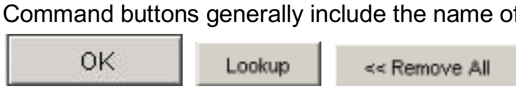
Component or Location	Terminology/Examples
Panes	The Explorer pane is the only pane referenced in Managed Objects technical documentation. It is a term that developed out of the need to refer to the pane in which the hierarchy displays. Do not bold Explorer pane in step-by-step instructions or general content. Use the preposition “In” when referring to the Explorer pane. In the Explorer pane, click to select **Administration**.
Tabs	Use “displays” when describing the result of opening a tab. Bold the names of tabs. Click the **Portal** tab. The **Portal** view displays.  Click the **Automation** tab. The **Automation** tab displays. Use the preposition “In” when referring to a tab. The element condition displays in the **Properties** tab.
Dialog-box	Refer to a dialog-box as a dialog. Dialogs include confirmation windows and information windows. Refer to them as dialogs and apply the terms and conventions for dialogs to them. Bold the name of dialogs. Use “opens” when describing the result of launching a dialog, window, or message/info box. Use the preposition “In” when referring to a dialog. Right-click **Administration** and select **Properties**. The **Properties** dialog opens.
Views	Use “updates” to describe the changes of a view. It is not necessary to document that the view updates after basic navigation instructions. Bold the names of view in step-by-step instructions. Bold the names of view in general content only when you need to draw the reader’s attention to them. In the Explorer pane, click to select **Administration**. The view updates.

Vocabulary and Terminology for Step-by-Step Instructions

Component or Location	Terminology/Examples
Main Menu	Use “From” when directing a user from the main menu. Use “select” when referring to the last option and “click” for any steps in between. Bold the names of menus. From the **File** menu, select **Change Password**. From the **View** menu, click **Default View** and select **Auto-select**.
Right-click Menus	Use “Right-click” to instruct the user to access any menu off of an element, chart, or background. Bold the names of right-click menus.  Right-click **Administration** and select **Properties**. The **Properties** dialog opens. Right-click the view background and select **Properties**. The **Properties** dialog opens.
Toolbar	Use the preposition “On” when referring to a toolbar. Bold the names of toolbars.  On the toolbar, click the **Back** button. The last element selected displays. On the toolbar, click the **Find** button. The **Find** dialog opens. On the toolbar, right-click anywhere in the **Filter** section and select **Critical/Major/Minor**. Other filter states dim.
Elements and Alarms	Use “Select” when instructing users to click on an element or alarm. Do not instruct users to “click on” an element or alarm. Bold the names of elements and alarms. Click to select the alarm(s). Click to select the element(s). From a list: Click to select **Administration**.
Sections	A section is part of a pane or dialog. Use the preposition “in” when specifying a section. Bold the names of sections. In the **Filter** section of the toolbar, click to select the **Filter** button(s) to remove the associated alarms from the view. The selected **Filter** buttons dim.

Buttons and Icons

Standards for Referring to Command Buttons and Mini-buttons

Component or Location	Terminology/Examples
Command Buttons	Command buttons generally include the name of the button on the button as follows:  When referring to a command button, state the name of the button. Do not include a graphic of command buttons within the text. Bold the names of buttons. To continuously update alarms, click the **Resume** button.

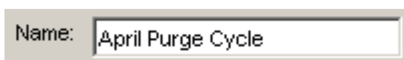
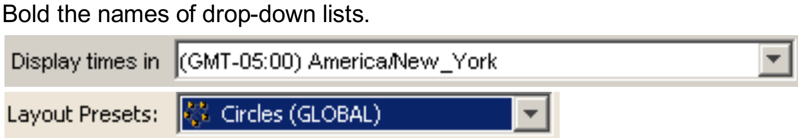
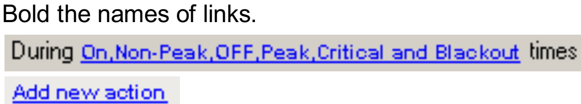
Standards for Referring to Command Buttons and Mini-buttons

Component or Location	Terminology/Examples
Toolbar Buttons	Toolbar buttons are generally a set of buttons that do not include the names of the buttons. Examples of mini-buttons include filter buttons toolbar buttons in the RSE product as follows:  Refer to mini-buttons as buttons. Do not include a graphic of the mini-button. Bold the names of mini-buttons. Click the appropriate **Filter** button.
Icons	Icons include graphical depictions of the button's purpose.  When referring to an icon, state the name of the icon and include the graphic of the button just before the icon's name. Bold the names of icons. On the **Rules Hierarchy** toolbar, click  **Delete**. A confirmation box opens to confirm the deletion.

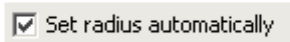
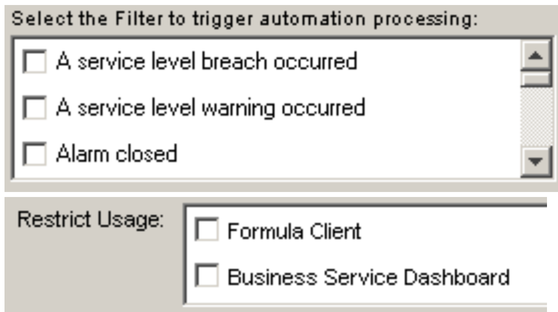
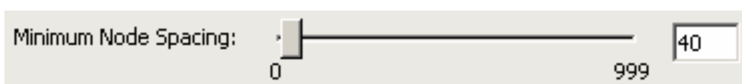
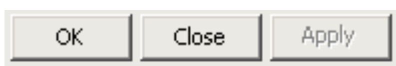
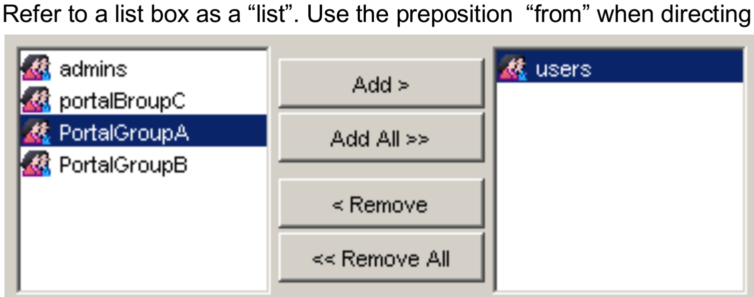
Referring to Screen and Dialog Components

The following table lists the components of dialog and screens and describes how to refer to each component.

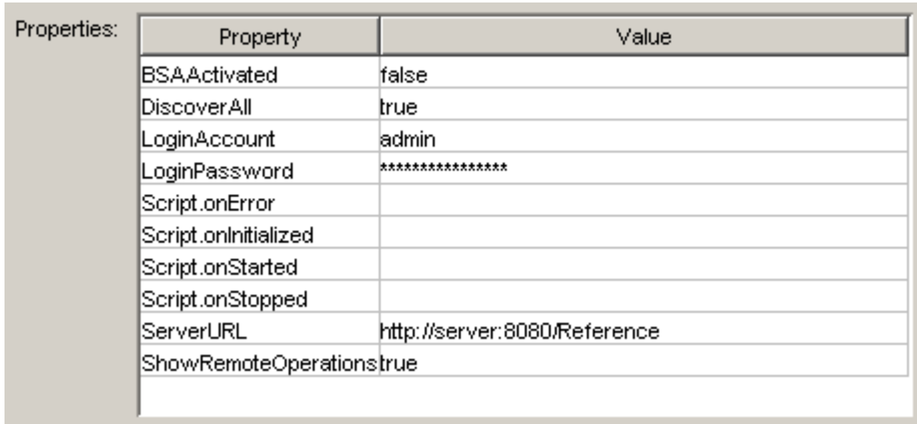
Screen and Dialog Components

Component	Example/Terminology
Text box	Use "Type" when instructing the user to enter data in a text box. Bold the names of text boxes.  (create profile) Type a profile name in the **Name** text box. (create calendar) Type a calendar name in the **Name** text box.
Drop-down List	For drop-down lists, use "Click" and "select". Bold the names of drop-down lists.  *(specific)* Click the **Layout Presets** drop-down list and select **Circles**. *(general)* Click the **Layout Presets** drop-down list and select a preset type.
Radio Button	For radio buttons, use "Click to select". Bold the names of radio buttons.  Click to select the **Use Interval** radio button. Click to clear the **Use Interval** radio button.
Hypertext Links	For hypertext links, use "Click the XXX link". Refer to hypertext links as "links". Bold the names of links.  Click the **Add new action** link.

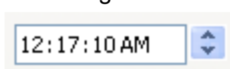
Screen and Dialog Components

Component	Example/Terminology
Check box	For check boxes, use “Click to select”. Bold the names of check boxes.  Click to select the **Set radius automatically** check box. Click to clear the **Set radius automatically** check box.  In the **Restrict Usage** section, select one or both options required to restrict access to the **Formula Client** or **Portal** tools. - **Formula Client** – prevents access to the Formula browser. - **Business Service Dashboard** – prevents access to PortalBuilder webpage and the Formula Portal Component Toolkit.
Slider Bar	For slider bars, use “move to adjust”. Bold the names of slider bars.  Move the M**inimum Node Spacing** slider to adjust the smallest acceptable spacing between element siblings.
Command Button	Use the name of the button and refer to it as a button.  Click the **OK** button.
List box	Refer to a list box as a “list”. Use the preposition “from” when directing a user to a list box.  1. To add the user to all groups, click the **Add All>>** button. All users and groups from the Not member of list display in the Member of list. 2. To selectively add the user to a group(s), click to select the **user group(s)** from the Not member of list. Click the **Add>** button. The user group(s) displays in the Members of list.

Screen and Dialog Components

<table>
<tr><th>Component</th><th>Example/Terminology</th></tr>
<tr><td>Property Table</td><td>When referring to property tables, use “In the XX section”.
Bold the names of properties.


Properties:	Property	Value
	BSAActivated	false
	DiscoverAll	true
	LoginAccount	admin
	LoginPassword	****************
	Script.onError	
	Script.onInitialized	
	Script.onStarted	
	Script.onStopped	
	ServerURL	http://server:8080/Reference
	ShowRemoteOperations	true

1. In the **Properties** section, specify required adapter information. For more information, see adapter properties.
2. Click the **Create** button. The adapter is created.</td></tr>
<tr><td>Spinners</td><td>When instructing users about a spinner, state the purpose of the spinner as opposed to instructing users to select the up or down arrow.


Use the Start Time spinner to select the starting time.</td></tr>
</table>

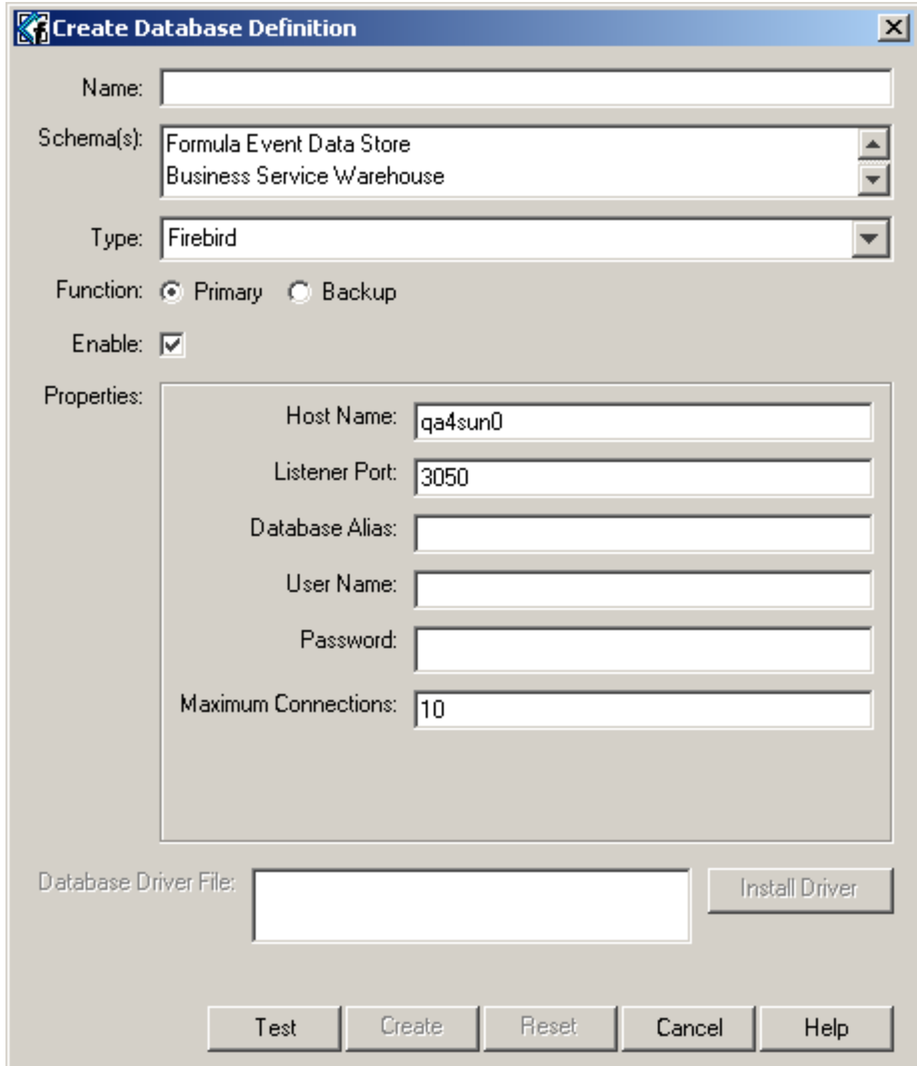
Miscellaneous Items in Step-by-step Instructions

Standards for Referring to Miscellaneous Items

Component or Location	Terminology/Examples
Command Line	Use “Type” when instructing the user to issue a command from the command line. For example, Type the command, **mosdaemon formula** at the command line prompt.
Toggling	For menu commands that toggle on and off, use “select or deselect” to indicate that users click on the menu command to do both. For example, In the Explorer pane, right-click the background and click to select or deselect **Show Condition Indicators**. When selected, condition indicators display.

Dialog Components

Use the dialog component name listed on the user interface to refer to the dialog components identified in the following illustration.

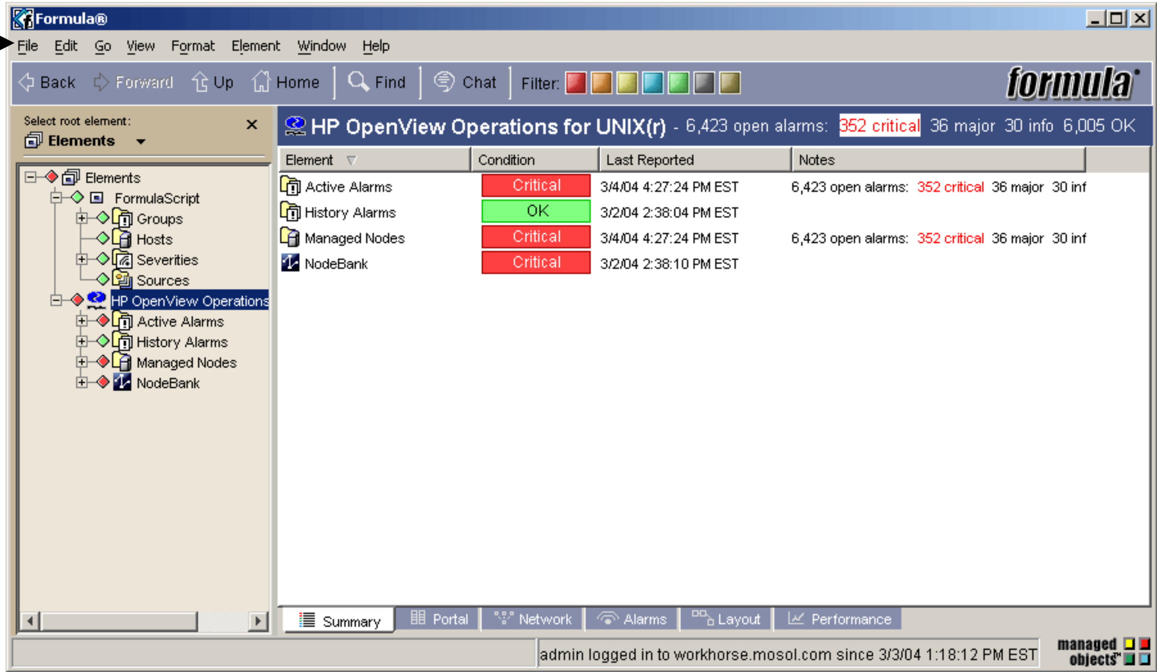


Dialog Components

Formula Browser Components

The following graphic depicts the Formula Browser components.

Menus



Formula Browser Components

Wizards

When describing the use of a wizard, refer to it as a wizard the first time and refer to the series of screens that display as part of wizard as dialogs. For example:

1. Click the **Add Organization** button. The **Add Organization** wizard opens.
2. Select the element to be added and click the **Forward** button. The **Browse for Element** dialog opens.

Index

Managed Objects technical documents contain an index that follows the following conventions:

- Use lowercase except for where capitalization is required.
- Do not repeat the main term in subentry.
- Limit the use of prepositions and articles. Use them only when they are necessary for clarity or sense. (i.e. reading from, writing to)
- Use a gerund rather than the infinitive or the present tense form for actions, processes, or procedures. (i.e. selecting, drawing, acknowledging)
- Use only one level of subentries.
- Use the plural form of all main entries that are nouns, except where awkward or illogical to do so. (i.e. files, headers, alarms) (i.e. e-mail, File command)
- Look specifically at the following for potential keywords when developing the index:
  - Headings
  - Terms and concepts important to the user
  - Overviews
  - Procedures and user actions
  - Acronyms

- Definitions or new terms
- Commands, functions, methods, and properties

The Index requires the following unique formatting:

- Insert a section break after the last line of the previous chapter to allow the footer to be modified from the footer used in the body of the document.
- Remove the word “Chapter” and the field inserted to refer to the Chapter number from the footer.

5

Document Content

Several sections are standardized in all Formula technical documents. This chapter presents the sections that are standardized within each Managed Objects technical document.

This chapter contains the following topics:

Copyright Text

Introduction Page Content

Introduction

Using This Guide

Related Documentation

Viewing Formula Documentation

Getting Help

Documentation Conventions

Copyright Text

Copyright text appears immediately after the cover page. You need to update the version number of the document, which is indicated below.

Update the copyright year here.

Update the title of the document and the month and year of publication here.

COPYRIGHT

TRADEMARKS AND PATENTS

Revision: v4 System Administration Guide (04/05)

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Introduction Page Content

Each Managed Objects technical document begins with an Introduction page that is Chapter 1. The Introduction page contains a paragraph that describes the intended users for the document and a brief overview of the document's contents. The following section, Introduction, can be copied and pasted into any Managed Objects technical document.

Introduction

Managed Objects software translates complex technology into business terms, enabling you to understand how your infrastructure impacts your business. Built with the latest generation of Internet technologies, it dynamically integrates and consolidates data from your existing management systems. From this single point of control, Business Service Views depict the relationship between IT resources and the services they support across management systems, business processes, and even across companies.

Managed Objects software also provides bi-directional access to the full functionality of your underlying management systems. This enables you to manage all your IT resources as a seamless, real-time representation of your business. This centralized view and control allows you to improve service across the board.

Using This Guide

Some Managed Objects technical documents contain a **Using This Guide** section that outlines how the content of the document can be used to accomplish specific tasks. It can also discuss how the content of the document relate to the content of other Managed Objects technical documents.

Related Documentation

The following tables list the documents available.

Getting Started Guides

Document	Description
Primer	Provides an overview and guidelines for implementing a solution that includes definitions for key terms and components and examples that illustrate server configurations
User's Guide	Provides instructions for using various management capabilities including basic browser features, creating drawings for Business Service Views, navigating element relationships and identifying objects affected by condition changes
Installation Guide	Provides instructions for installing and launching Managed Objects software and Object Request Brokers (ORBs) for supported management systems
Release Notes	Describes new features and changes in the release

Administration Guides

Document	Description
Administrator's Guide	Describes how to configure the browser, define organizations, create users and groups and define their access privileges to various elements, set up automation events, frequently used administrative utilities, and other administrative tasks
Script Guide	Provides instructions for using FormulaScript to customize enterprise management capabilities to more efficiently manage the elements in a managed environment

Administration Guides

Document	Description
Business Service Warehouse Data Dictionary	Provides lists and descriptions of Business Service Level Manager™ (BSLM) performance database tables, alarm tables, and warehouse database tables

Application and Management Tool Guides

Document	Description
Business Data Integrator™ (BDI) Guide	Provides instructions to extract business metrics from databases and analytics from business intelligence tools for correlation, analysis and visualization using Business Service Views and Business Service Dashboards
Business Experience Manager™ (BEM) Guide	Provides instructions for collecting application and performance metrics from a wide variety of sources, managing response time, synthetic testing and application performance from a single application, and identifying and prioritizing sources of performance problems
Business Service Configuration Manager™ (BSCM) Guide	Provides instructions for using the Business Service Configuration Manager to obtain visibility into a network to manage the lifecycle of services and includes information about how to correlate network objects, create a virtual CMDB, map dependencies into views, and automatically adapt to changes and identify services that are under managed
Business Service Dashboard™ (BSD) Guide	Provides instructions for building custom portals and dashboards using the PortalBuilder™ or JSP programming to leverage the JavaServer Pages (JSP) tag libraries and the Portal Component Toolkit™
Business Service Level Manager (BSLM) Guide	Describes how to use the Business Service Level Manager to define service level agreements and objectives and to monitor, manage and report service level health and compliance in real-time and historically
Business Technology Insight Guide	Provides instructions for discovering and monitoring application components, dependencies, and utilization in your network
Event Integrator™ Guide	Provides instructions for processing alarm and other data derived from different sources through the Event Integrator and creating and managing rulesets using the Event Integrator Ruleset Editor
SNMP Integrator Guide	Provides instructions for using the SNMP adapter to poll, and obtaining and viewing data available about SNMP agents

Integration Guide

Document	Description
Adapter and Integration Guide	Provides instructions for creating and configuring adapters to integrate with different management systems, representing data from multiple sources such as log files and databases as events and integrating with discovery tools and trouble ticket systems

Support Guide

Document	Description
Customer Support Guide	Describes the support infrastructure at Managed Objects, the areas covered by Support, the process for interacting with Support, and the guidelines and objectives that Managed Objects maintains for Customer Support

Formula delivers its product documentation as **.pdf** documents that are available from the **Start >Programs> Managed Objects> Documentation** menu. In addition, several online user guides and online Administrator and Client Help functions

Viewing User Documentation

From the Formula home page, you can view all Formula user documents in an Adobe Acrobat PDF format. To download a PDF reader, go to http://www.adobe.com/.

To view Formula documentation from the Web browser:

1. From the Managed Objects Login page, click the **Documentation** link. The **Documentation** Web page opens.

2. Double-click the Formula documentation link for the document you want to access. The document opens in a PDF reader or Web browser.

To view Formula documentation from the desktop application:

1. From the desktop, click **Start**, **Programs**, **Managed Objects**, and select **Documentation**. The **Documentation** Web page opens.
2. Click the link for the document you want to access. The selected document opens in a PDF reader or Web browser.

Accessing Online Help

Formula online help includes administrator and end user topics. A keyword search feature is available to help locate a specific topic.

To access online help:

- From the Managed Objects browser, click the **Help** link and select **Open Online Help**.

Documentation Conventions

The following documentation conventions are used throughout Managed Objects technical documentation.

Document Conventions

Convention	Description
Bold	File names, path names, user interface elements, and URLs are presented in **Bold.**
Plain Italics	Reference sources or other documents referenced in this guide are *italicized*.
Bold Italics	Information you supply is presented in ***bold italics***.
Courier with grey shading	Programming code examples are shown in plain `courier` or courier with grey shading. **`Courier Bold`** is used for emphasis.
Mouse Instructions	▪ "Click" refers to a single click of the left mouse button. ▪ "Double-click" refers to two quick clicks of the left mouse button. ▪ "Right-click" refers to one click of the right mouse button. ▪ "Drag" refers to holding down the left mouse button while moving the mouse. ▪ "Select" refers to clicking an option.
blue underlined text	Hyperlinks are presented in blue underlined text

6

Preparing Documents for Publication

Before Managed Objects technical documents are released for publication and distribution, they are reviewed for quality and converted to **.pdf** file format. This chapter describes the quality assurance process for technical documentation.

This chapter contains the following topics:

Quality Assurance Process - Technical Documents

Quality Assurance Process - Release Notes

PDF Generation

Quality Assurance Process - Technical Documents

Prior to generating the **.pdf** version of a document, review the format and content for compliance with the Writer's Guide. The following table lists items and information that are reviewed for quality and can be used as a checklist to document the quality review of technical documents.

Release Notes Quality Assurance

Section	**Description**	**Yes**	**No**
Title Page	▪ Title cored ▪ Version number correct		
Copyright Page	▪ Copyright year updated to current year ▪ Revision number and month/year of publication correct		
Table of Contents	▪ Table of Contents generated prior to publication ▪ Chapter numbers correct ▪ Chapter numbers removed from Index and Appendices		
Page Layout	▪ Page numbers begin with 1 on the first page of Chapter 1 ▪ Page numbers sequential throughout document ▪ Setting in compliance with Page Setup Requirements		
Chapter Pages	▪ Each chapter's first page contains list of Heading 2 topics as hyperlinks ▪ Page break inserted at the end of the first page of each chapter		
Content	▪ Ariel text used throughout document ▪ Instructions are numbered sequentially begin with 1for the first stop of each list in compliance with Step-by-Step Instructions ▪ All highlighting and track changes notations removed ▪ Spell check has been run ▪ All tables have a title in a cell at the top of the table except for tables in step-by-step instructions in compliance with Tables ▪ All figures have a caption except for figures in step-by-step instructions in compliance with Illustrations and Captions ▪ All bulleted lists use the correct bullet style in compliance with Bulleted Lists		
Index	▪ Index has been run		
Footers	▪ Footers begin with page 1, which is the first page of Chapter 1 ▪ Footers in compliance with Page Footers		

Quality Assurance Process - Release Notes

Release Notes summarize the changes in the product for each release. Changes can include Enhancements or Resolved Issues. Enhancements are improvements in the product that are applicable to all or a broad range of customers. Resolved Issues are changes in response to a specific issue identified by a customer or internally.

When possible, classify changes as Enhancement including changes initiated in response to an issue or problem. The following procedure describes the process used to evaluate and summarize product changes as either an Enhancement or Resolved Issue.

To Review all Change Requests (CRs) to classify each as either an Enhancement or Resolved Issue:

1. Review each CR title to determine if it includes a Support Request (SR) number.
2. For CRs that include and SR number and no Customer is specified, rewrite the change as an Enhancement, if possible.
3. For CRs that do not do not include an SR number and a Customer is specified, perform one of the following steps:
   - Review the **Attachment** links to determine if the CR is linked to a SR and review the related SR to determine if the change can be written up as an Enhancement.
   - Review the **Attachment** links to determine if a Managed Objects employee, which is indicated by **Internal MO**, initiated the CR and classify the change as an Enhancement unless the change was minor and does not need to be included in the Release Notes.
4. After classifying each CR as an Enhancement, Resolved Issue, or issue so minor that it does not need to be included in the Release Notes, group related CRs by product. Use product area in front of the short description when there are multiple CRs for a product/product area. Subcategorize issues under a product if multiple issues exist or it is deemed appropriate. Where possible, combine items that are similar.
5. Organize and combine similar items within the lists of Enhancements and Resolved Issues.
6. Format each item using the following format conventions:
   - Short description. (CR# XXXXX / SR# XXXXX)
   - Short description. (CR# XXXXX, XXXXX / SR# XXXXX, XXXXX)
   - Product Area: Short Description. (CR# XXXXX / SR# XXXXX)

Copies for the QA Department

Because PDF generation is time consuming and guides change often up until the final build for a release, we make every attempt to limit the number of times that PDF files are generated. To facilitate general QA efforts without requiring PDF generation, be sure to copy a version of the Word docs into the **gwynn/source/docs for Eddie** directory on a regular basis or after major updates to the docs.

PDF Generation

All Managed Objects technical documentation is delivered to customers as a **.pdf** file on a CD.

To generate a .pdf:

1. Scroll through the file to ensure that the file was properly generated.
2. Collapse the bookmarks.
3. Set the file so that the bookmarks tab is open when the pdf document is opened

7

Online Help

The online help system is generated using RoboHelp. This chapter provides an overview of required steps and useful information when generating Managed Objects online help.

This chapter covers the following topics:

RoboHelp

Online Help Topics

Project Source Files

Files, Formatting & Customizations

Verification Steps

Online Help Generation

RoboHelp

The Managed Objects help system is a web-based help system implemented by using RoboHelp X5. The following are external resources that may be of help when developing in RoboHelp:

- http://www.grainge.org/
- http://www.macromedia.com/cfusion/webforums/forum/index.cfm?NoCookies=Yes
- http://www.macromedia.com/support/robohelp/htmlhelp.html
- http://www.helpdevelopment.com/webhelp/creating_a_webhelp_3_glossary.htm

Online Help Topics

Currently, the online help is divided into the following main topics:

- General Topics (topics from the user guide)
- Administration (topics from the admin guide)
- Event Integrator (topics from the Eve guide)
- Service Level Agreements (topics from the BSLM guide)
- Business Service Dashboards (portalbuilder portlets (edit-side options))

Topics Unique to the Online Help System

The following topics are unique to the online help system. In other words, they are ***no longer covered in the user guides***, but only in online help:

- PortalBuilder Portlets – edit-side options for each portlet.
- Relationship Browser – option descriptions for the **Manage Layout Presets** and **Element Layout Properties** dialogs.

Project Source Files

The RoboHelp project (source files) can be checked out using Subversion from the **MOS_Help/onlineHelp/src** directory.

To update the online help and check into the product:

1. Update the help using RoboHelp and generate the output.
2. Create a language specific folder directly under one of your local drives and direct the RoboHelp output to that directory. (e.g. **d:/en** for English).
3. Create a zip of the folder (e.g. en.zip)
   - It is important to select the option to retain directory information (i.e. en/…)
4. Check in the zip file(s) into SVN in the **MOS_Help/onlineHelp** directory.

Hooks from Managed Objects Software

The links that the product uses to access the online help system are in the **MOS_Help/onlineHelp/xml/helpcontent.xml** file. All URLs need to be lowercase to match the generated help files from RoboHelp.

Files, Formatting & Customizations

Topic Files & File Extensions

Topic files use the following standards:

- All files use the .html extension. When creating a new topic please be sure to use the .html extension.
- Filenames should be lower case. This is best if the online help is being used in a UNIX environment.

Stylesheet

All files use the xxx.css stylesheet file. When creating a new topic please be sure to attach the styesheet to the topic file.

Templates

The **Templates/MO Template.htt** file provides style guidelines and various elements that can be copied and pasted into a topic file:

- 2 and 3 column Tables
- Notes

Removing the RoboHelp Logo

It is necessary to perform this procedure from any machine where the online help system is generated from.

To remove the RoboHelp logo from your RoboHelp projects:

1. Locate your webhelp **template_skin** directory. Mine was at C:\Program Files\RoboHelp Office\RoboHTML\WebHelp5Ext\template_skin.
2. Find the **whtbar.js** file and make a backup copy somewhere.
3. Open **whtbar.js** with Notepad.
4. Find the code block in the addButton function (not addBanner) that starts with else if(sType=="banner")
    - This appears at the end of the addButton function and just before the isShowHideEnable function on my system.
5. Comment out the line in that block that reads
    - addBanner(sI1);
6. To comment out the line just type // at the start of the line. This prevents the addBanner function from running, but leaves everything else intact.
7. If running RoboHelp, you'll need to exit and restart the program for the changes to take effect.

It doesn't remove the logo from existing projects but you'll never see it in a new one unless you reverse the procedure.

Verification Steps

The following things need to be performed routinely before the final build for a product release.

- Check for and resolve any broken links

Online Help Generation

Keeping RoboHelp files current is a multi-step process. Generate the output, zip it up then check it into subversion along with RoboHelp project files that have changed.

To generate the online help output:

1. Click **File** and select **Generate Primary Output** (should be **WebHelp**).
2. If there is an option to convert all files to lowercase, select it.
3. Make sure output directory is **en** and the start page is **Managed_Objects_Online_Help.html**.
4. Select the **DHTML > Java Applet > Pure HTML** radio button.
5. Select the **Optimize Speed for: Local PC or Intranet** radio button.
6. Zip all the files in the **en** directory using the **Save extra folder info** option (or one that saves folder structure info. Check in the source and zip file to subversion. See Project Source Files.

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