

Guidance for Customer Service Documentation

0318-02-G1

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1. Introduction

This document is intended to provide guidance to authors of service documentation.

2. Guidance

2.1. Installing the Word templates

The following situations are possible:

- **Update existing templates:** The Service templates are already installed on your PC.
Workflow:
 1. Check what your template folder is (Click the Office button, Word options, Advanced, under General: File locations: user & workgroup templates).
Make sure that the templates are only installed in that folder. If the word templates (or older versions) are saved in more than one folder, you can run into strange phenomena.
 2. Close Word
 3. Delete all files in the template folder
 4. Unzip installer files to your template folder
 5. Open Word
- **New Installation:** The Service templates are not yet installed on your PC.
Workflow:
 1. Close Word
 2. Unzip installer files to your template folder (details in: Unzip the file)
 3. Open Word

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4. Update your trust center settings (details in: Trust Center)
5. Update your template location (details in: Template location)

2.1.1. Unzip the file

To install the **ManualTemplate**, unzip all files to a folder of your choice and run the "**Installer**.EXE**".

If you already had the **ManualTemplate** installed use the same folder (check via Office button, Word options, advanced, General, File locations)

The **main folder** contains the following files:

- IATD.dotm
- ManualTemplate.dotm (**always start with this one**)
- Newsletter.dotm
- PRD - Manpower & tools & materials.dotm
- PRD - Product planning data.dotm
- PRD - Room requirements.dotm
- PRD - System planning data.dotm
- Product manual - 11 tabs.dotm
- Product manual - No tabs.dotm
- Product Manual - Single section.dotm
- SMI - Front page.dotm
- SMI - module.dotm
- Software installation manual.dotm
- System manual planned maintenance.dotm
- Upgrade manual.dotm
- LoadExternalData_example.txt

The **subfolder**, named **pictures** contains the files:

- CAUTION.DOC
 - NOTE.DOC
 - WARNING.DOC
- These files contain the standard styles (text and icon) for these statements.
- CSIP0.docx
 - CSIP1.docx
 - CSIP2.docx
- These files contain the standard text, used in the CSIP-box at the bottom of the first page.
- logo.eps

2.1.2. Trust Center

The security settings in Office 2007 prevent macros to run unless the trust Center is set to accept the macros in these templates. Mind that macros only work in a macro-enabled template (extension dotm). So if you have to change a template, make sure that the extension remains "dotm" and is not changed to "dotx".

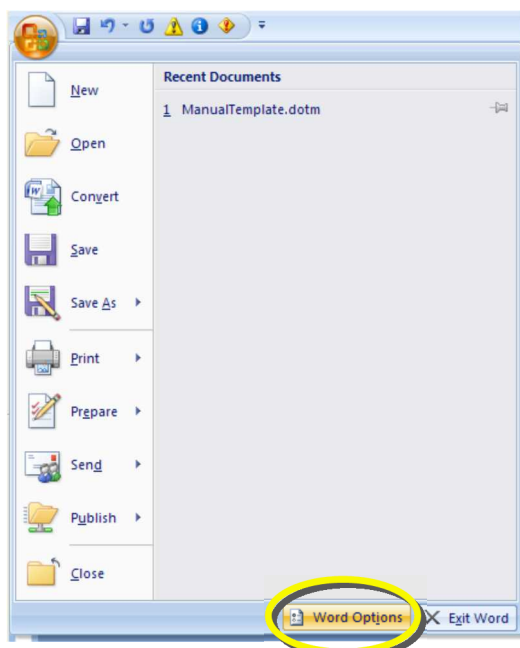
Follow this procedure to change the settings:

- 1 Click the Office button ().

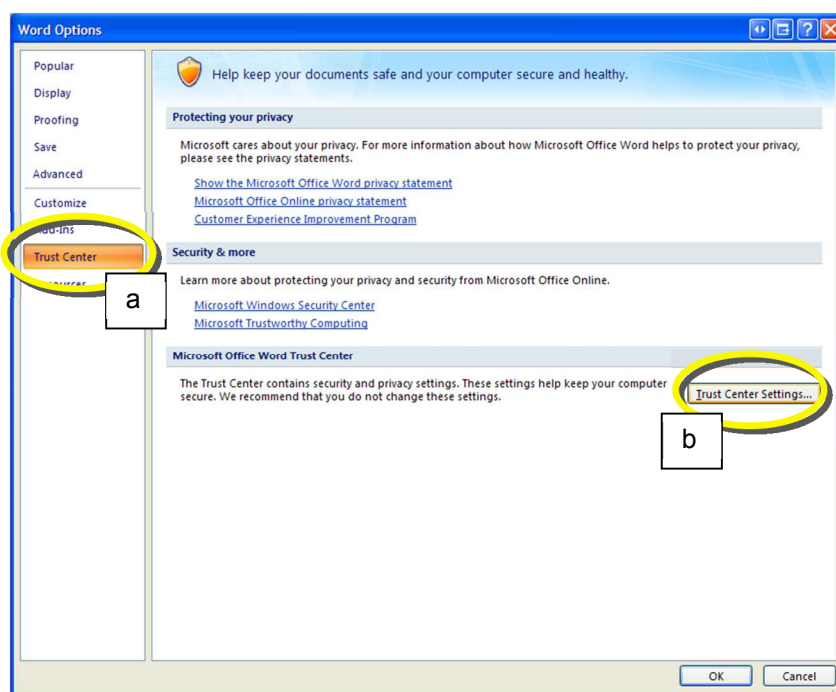
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- 2 Click the **Word Options** button.



- 3 Click **Trust Center** in the left pane.
4 Click **Trust Center Settings...**



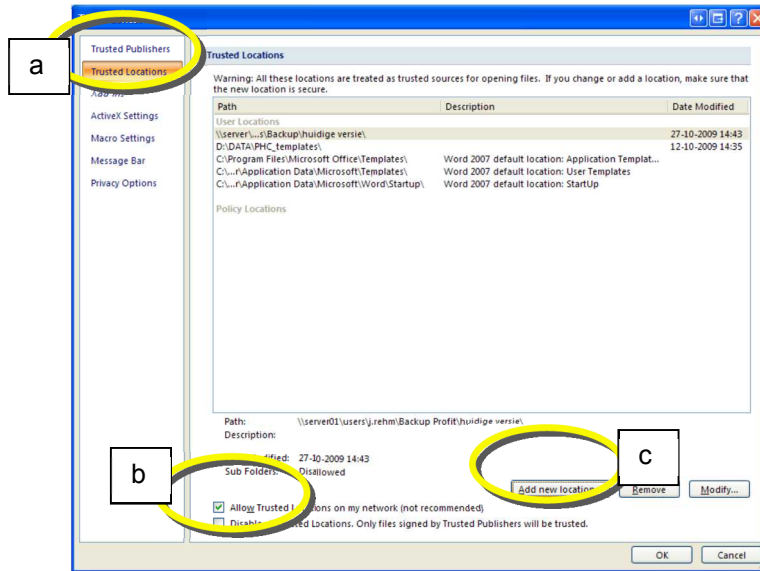
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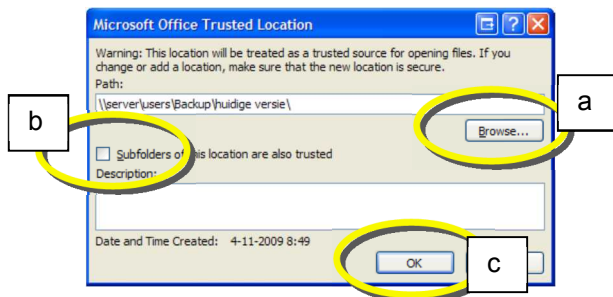
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- 5 Click **Trusted Locations** from the left pane. If you want to install the templates on a network location, select the **Allow Trusted Locations on my network (not recommended)** checkbox at the bottom.



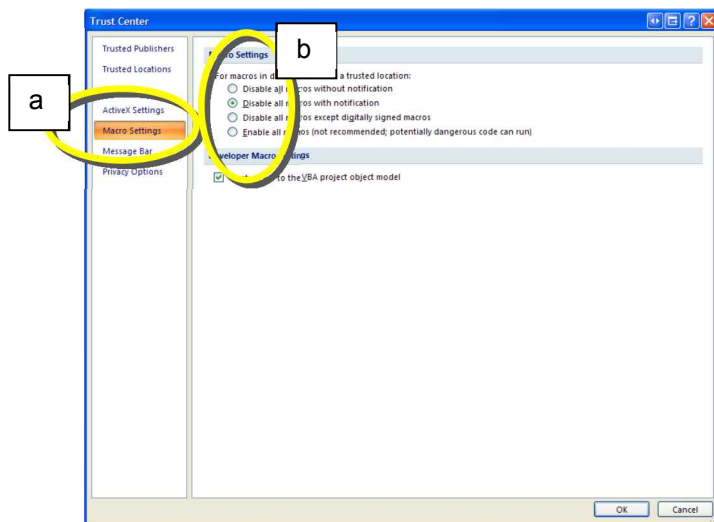
- 6 Click the **Add new location and browse** button to select the location where you installed the templates.
- 7 Select the **Subfolders of this location are also trusted** check box. Confirm your choices by clicking the **OK** button.



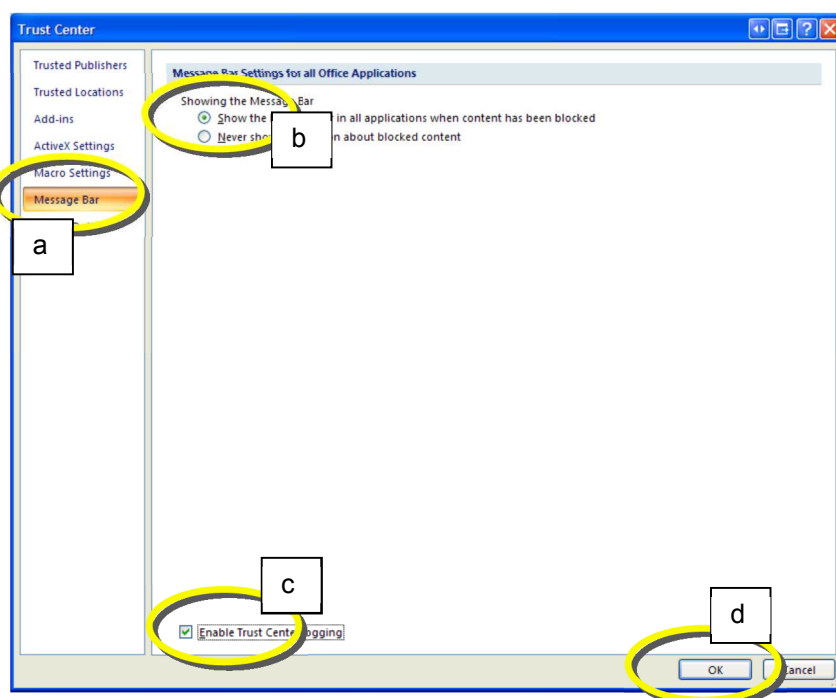
- 8 Click **Macro Settings** in the left pane.
- 9 Select **Enable all macros** only if you are sure that you never receive any document containing malware or viruses. If not, select **Disable all macros with notification** so you get a message when MS Office blocks a macro.

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- 10 Click **Message Bar** in the left pane.
- 11 Select **Show the Message Bar in all applications when content has been blocked**. By doing so, you always see if Office has blocked a macro.
- 12 If you want to record all actions of the Trust Center in a logfile, select **Enable Trust Center logging**. The file is stored in the location %USERPROFILE%\Local Settings\Application Data\Microsoft\Office\TCDiag
- 13 Click the **OK** button. A new window appears.
- 14 Click the **OK** button.




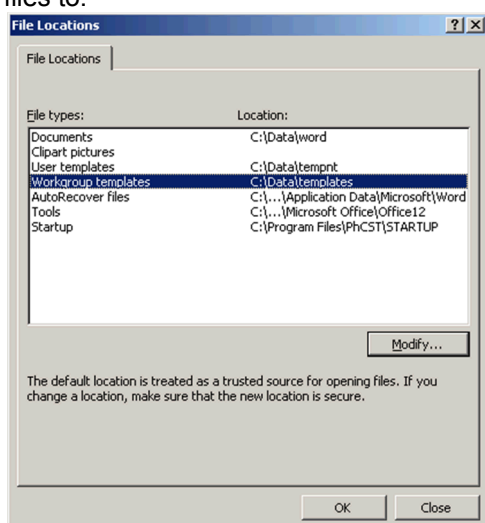
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2.1.3. Template location

Make sure that Word knows the location of your templates.

- 15 Click the Office button ().
- 16 Click the **Word Options** button.
- 17 Click Advanced in the left panel, scroll down on right side, and click File locations
- 18 Click "Workgroup templates", click **Modify** and browse to the folder you unzipped of the service templates files to.



- 19 Click **OK** two times.

2.2. Create a New Document

To start a new document, you **MUST** open the template **ManualTemplate.dotm**. Do not open other *.dotm files of the templates folder; they are activated via this template.

The first time you use the template, go to the folder you zipped the files to via Windows Explorer and double-click it.

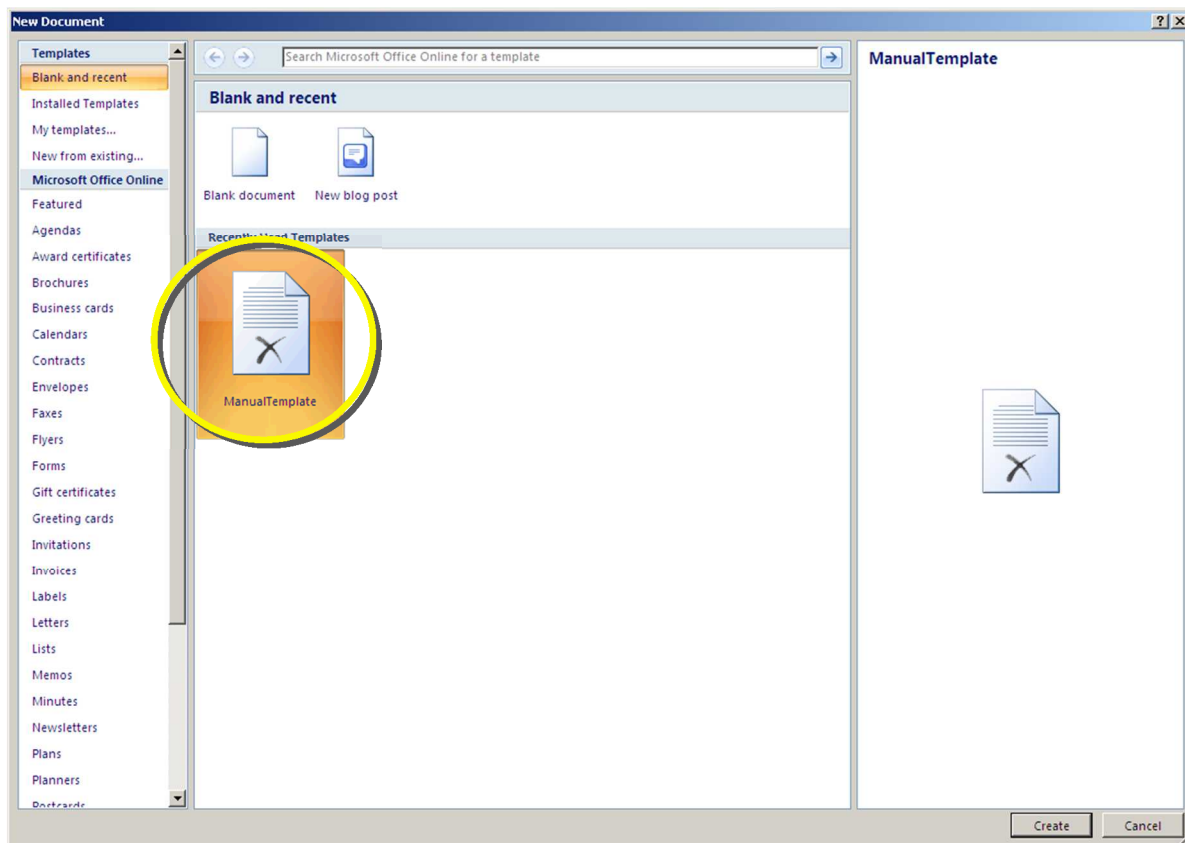
If you have used the template before, it is in the list of Recently Used Templates:

- 1 Click the Office button ()

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- 2 Select **New**. The following window appears:



- 3 Select **Manual Template** and click the **Create** button.

2.2.1. The standard Manual Template

After opening the standard Manual Template, the Startform will pop up.
On this form, enter all data necessary to create the document.

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Startform

PHILIPS

Manual template version 3.2
November, 2012

Mandatory fields

Business Unit

Title

DMR number

Revision number

Copyright

Document type

CSIP-level

Optional fields

12 NC

Subtitle

Picture

Load external data Store data OK ?

The form consists of three sections:

- Mandatory fields
- Optional fields
- Buttons

The data from the Startform are stored in the custom document properties from the specific document.

Mandatory fields

Fill out all mandatory fields before you press OK. If not all mandatory fields are filled, a message pops up. Close the Startform via ☒. Mandatory fields are:

- Business unit (the official name of the business unit, shown in the document, directly below the Philips logo)
- Title (the document title, shown directly under the document type):
 - For FCOs: Only fill out the full FCO number (for example, FCO72200120)
 - For PRD: the category (Manpower & Tools & Materials, Room Requirements, Product Planning Data, System Planning Data) is listed below the document type.
 - For SMI: select the section name in the drop-down box under the document type
- DMR number (the full DMR number, shown in the footer of the document. Format DMR#####)
- Revision number (indicating the current document revision, shown in the footer of the document)
- Copyright (the year the document was created, shown in the footer of the document)
- CSIP level (shown in the footer of the document. It is also used to link the text in the CSIP textbox at the bottom of the first page)
- Document type (a list of available types, choose from the list, determines which specific template has to be used)

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- FCO - MA
- FCO - AP-pa
- FCO - AP-Rof
- FCO – SR
- FCO – SR+
- IATD
- Newsletter
- PRD - Manpower & Tools & Materials
- PRD - Product Planning Data
- PRD - Room Requirements
- PRD - System Planning Data
- SMI - front page
- SMI - module
- Software installation manual
- System Manual Planned Maintenance
- Upgrade manual
- Spare part replacement manual
- Product manual - 11 tabs
- Product manual - No tabs
- Product manual - Single section

Optional fields

Optional fields do not have to be filled. The optional fields are:


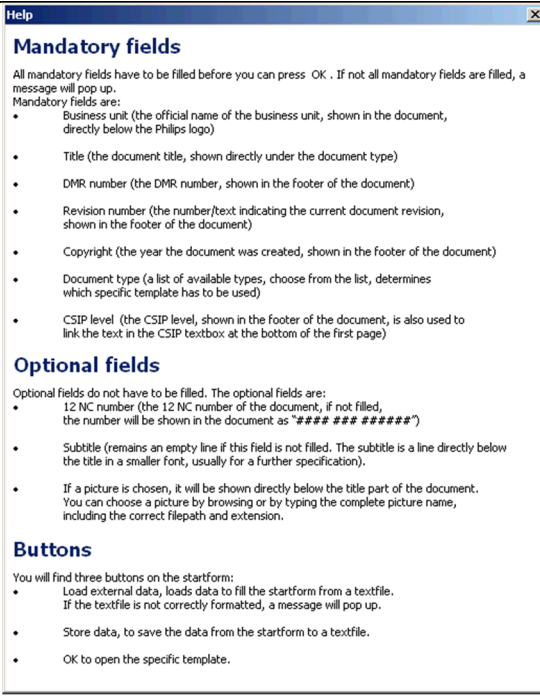
- 12NC number
Enter the 12NC number of the document (format: 45## #### #######), a forward slash (/) will be entered automatically to create a separation with the revision number. If not filled or 12NC is removed afterwards, also remove the slash.
- Subtitle (remains an empty line if this field is not filled). The subtitle is a line directly below the title in a smaller font, usually for a further specification).
For FCOs: Fill out the title of the FCO (for example, AD7 tilting play in table top)
- If a picture is chosen, it shows directly below the title part of the document. You can choose a picture by browsing or by typing the complete picture name (including the correct file path and extension).

Buttons

You find the following buttons on the Startform:

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<ul style="list-style-type: none"> • Load external data, to load data to fill the Startform from a text file. If the textile is not correctly formatted, a message pops up. An example file is available in the root folder : <i>LoadExternalData_example.txt</i> • Store data, to save the data from the Startform to a text file. You can only specify the storage folder, the file name consists of the DMR-number and the revision (for example, <i>DMR987654_00.txt</i>) • OK, to open the specific template. •  Help info, displays the Help screen: 	 <p>Help screen</p>
---	--

Fields of the Startform

You can change all data from the Startform by changing the custom document properties, except for the image. Open the properties by clicking the **Properties** button on the **Service ribbon** tab, or through the Office button > **Prepare > Properties**. Update them via the **Service ribbon** tab > **Properties** button > **Custom** tab

To insert these fields on other locations in the document:

- 1 Select **Insert > Quick Parts > Field**
- 2 In the **Categories** field, select **Document information**
- 3 In the **Field Names** field, select **Docproperty**
- 4 In the **Property** field, select the field of your choice

2.2.2. Service ribbon tab

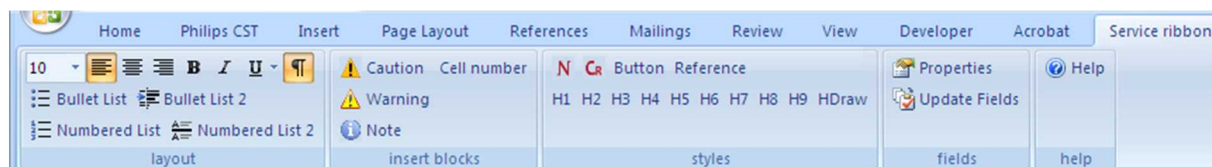
When the Startform is filled out completely, the specific selected document is generated.

In the main menu, a **Service ribbon** tab is added. It contains the following blocks:

- **layout**: font size, 3x aligning, bold, italic and underline, list with bullets (dots) list with bullets (dashes), numbered list and show paragraph markers.
- **insert blocks**: insert caution, note or warning, text blocks taken from the pictures-directory
- **styles**: 14 styles, used in all documents
- **fields**: properties, update fields
- **help**

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**Layout**

Font size	Change the font size
Left Align	Align the text to the left
Center align	Align the text in the center
Right align	Align the text to the right
Bold	Make selection Bold
Italic	Make selection <i>italic</i>
Underline	Make selection <u>underlined</u>
Show/Hide	Show paragraph marks and other hidden formatting symbols
Bullet List	<ul style="list-style-type: none"> Bullet list
Bullet List 2	<ul style="list-style-type: none"> <ul style="list-style-type: none"> Bullet list 2 (indented, to be used for sub lists under Bullet Lists)
Numbered List	<ol style="list-style-type: none"> Numbered list
Numbered List 2	<ol style="list-style-type: none"> <ol style="list-style-type: none"> Numbered list 2 (indented, to be used for sub lists under Numbered Lists)

Insert blocks

Note	Inserts a Note
Caution	Inserts a Caution
Warning	Inserts a Warning
Cell number	Required for the numbering in the Fault Isolation tables

Styles

Normal	Normal style (same as the current Normal) Arial, 10 pt
Courier	Can be used to format logfiles or text dumps from the system
Button	Makes a button of the selected text
Reference	To be used when referring to an External Reference (outside the document)
H1.. H9 HDraw	Heading levels 1 up to 9 HDraw is required for drawings in section Z drawings. To prevent that drawing numbers are preceded by chapter numbers. Now you get in chapter/section drawings only the drawing numbers and description in the TOC`

Fields

Properties	Accesses the data of the Startform at the click of a button, select Custom. Do not forget to click Modify and selecting Update Fields to activate the changes.
Update fields	Select this option to updated Property field

Help

Help	Opens this document
------	---------------------

Printed copies are not controlled

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2.3. Apply the new template to an existing document

Documents based on an older template have to be 'converted' to documents based on the Word2007 template. The older templates contain different styles than the new Word2007 template.

If during conversion of the document the old styles are deleted, you save much time in working on the new document in the future. The deletion of old styles is incorporated in the conversion procedure.

2.3.1. Conversion procedure

- 5 Open the file with the old template.
- 6 Select the **Office** button > **Word options** > **Add-Ins** > in the drop down box select **Templates** > click **Go...** > click **Organizer** > select **Styles** tab.
- 7 Select all styles in the left part of the window.
- 8 Click the **Delete** button. Some styles cannot be deleted. This is not a problem.
- 9 Click the **Close File** button on the right side.
- 10 Click the **Open File** button on the right side.
- 11 Select the relevant template, for example, 'SMI - module.dotm'
- 12 Select all styles in the right part of the window and copy them to the left part. Overwrite all existing styles.
- 13 Click the **Close** button.
- 14 If there is more than one Word section in the file, you are converting and you do **not** need those sections in the new file:
 - o Ctrl+ h
 - o In the **Find what** field, insert: **^b**
 - o In the **Replace with** field, delete entries, if any.
 - o Click the **Replace All** button.
- 15 Open the new template, the Startform appears.
- 16 Fill in the fields and select the relevant Document type, for example, 'SMI - module.dotm'
- 17 Click the **OK** button.
- 18 Delete everything below the 'Table of Contents'.
- 19 If there is more than one Word section in the old file you are converting, and you **need** those sections in the new file: make an extra section in the new file.
- 20 In the old document, select all (Ctrl + a).
- 21 Copy all (Ctrl + c).
- 22 In the new document, paste all (Ctrl + v). The result takes some time. Check not to copy deleted text from the old document (as a result of use of track changes).
- 23 Delete the second 'Table of Contents'.
- 24 Ctrl + a > select F9 > **Update entire table** > **OK**
- 25 On the **Service ribbon** tab, click the **Properties** button.
- 26 Select the **Custom** tab.

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- 27 Change the properties where necessary.
- 28 On the **Service ribbon** tab, click **Update Fields**.
- 29 Save the file.
- 30 Change the captions for figures en tables (center them and make them bold)
- 31 Change the Headings 2 (the indent position changes).
- 32 Change the lay-out of Cautions, Warnings and Notes.
- 33 Change the page layout where necessary.
- 34 Save the file.

2.4. Hints & Tips

Keep in mind that the document you create will possibly be modified by somebody else in the future. Stick to the rules below, it significantly helps to keep the maintenance labor to a minimum.

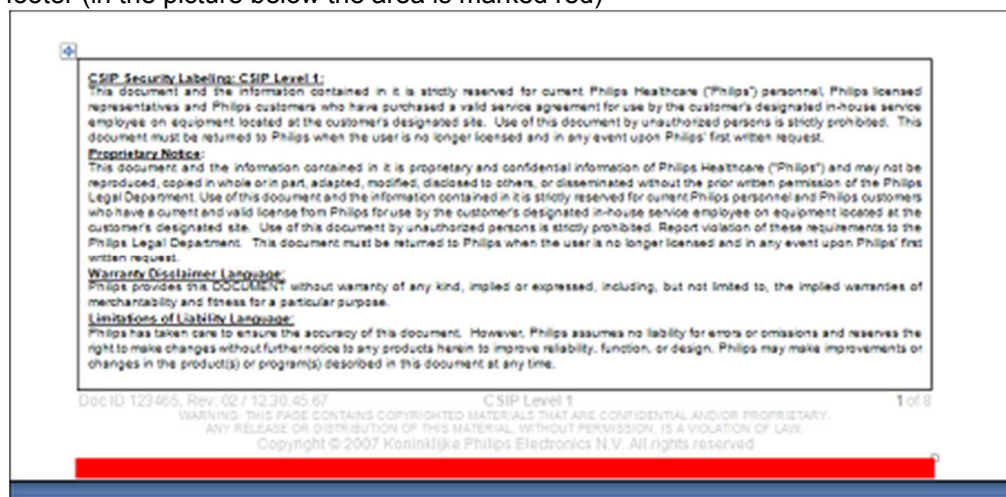
Another thing to remember is that Word is the source file. Our end-users more and more have to rely on the electronic format, being PDF at this moment. Make sure that the PDF works as expected and opening is the same over all PDFs.

2.4.1. Known issues

Modifying the footer on the first page

If you want to change the footer on the first page, and click it, you end up in the CSIP text table.

Keep in mind that the table has 2 rows. The upper row contains the CSIP text, the lower is blank but positioned over the footer. Select the table and you see the end-table mark. Click below that area and you can modify the footer (in the picture below the area is marked red)

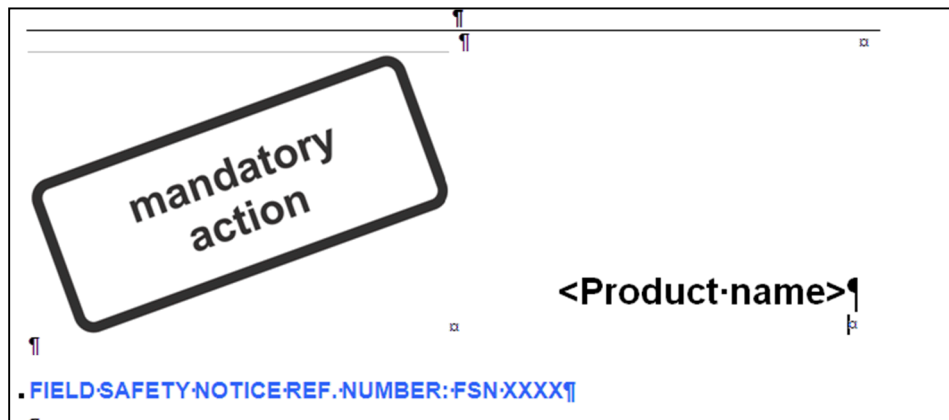


Line displayed above FCO category pictures

When you open an FCO document, it is possible you see a grey line above the FCO category picture. This is an error in the display mode. It is not part of the Word document. If you zoom in/ou the line disappears. When the document is printed, the line is visible.

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I do not want to have all 9 heading levels in my TOC

The new template offers the possibility to use up to 9 heading levels. By default they are part of the TOC. For fewer levels in the TOC (for instance a maximum of 4), use the Word TOC functionality:

Select: **References, Table Of contents, Insert Table Of Contents**, Select the maximum number of levels you want to see (4 in this example). Make sure that in Formats **From template** is selected.

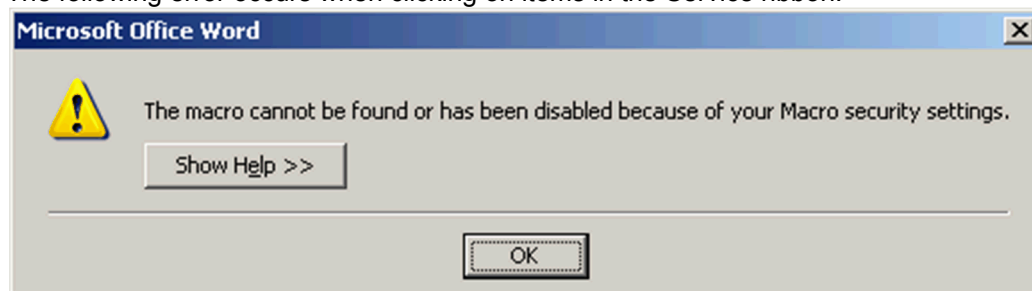
Philips logo and CSIP text is missing

If this phenomenon occurs, you opened the document specific template and did not start with ManualTemplate.dotm.

To correct follow instructions in chapter "Create a New Document".

Error: The macro cannot be found . . .

The following error occurs when clicking on items in the Service ribbon:



If this phenomenon occurs, you opened the document specific template and did not start with ManualTemplate.dotm.

To correct follow instructions in chapter "Create a New Document".

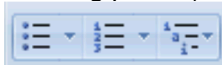
Heading numbering does not follow heading 1

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Word-bug: Heading 1 “disconnected” from the rest of the style sheets causing incorrect heading numbers (they only follow the first level of H1).

In the Word ribbon “Home” tab, select Multilevel list in section Paragraph (most right in the following picture):

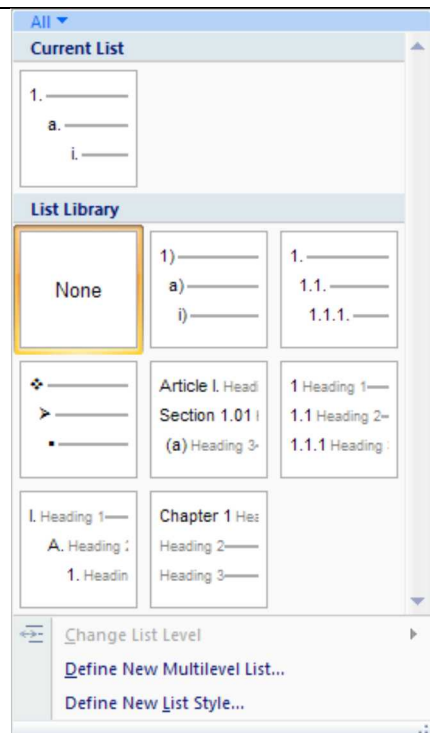


This shows the picture on the right.

You can recognize the bug as follows: the above screen shows:

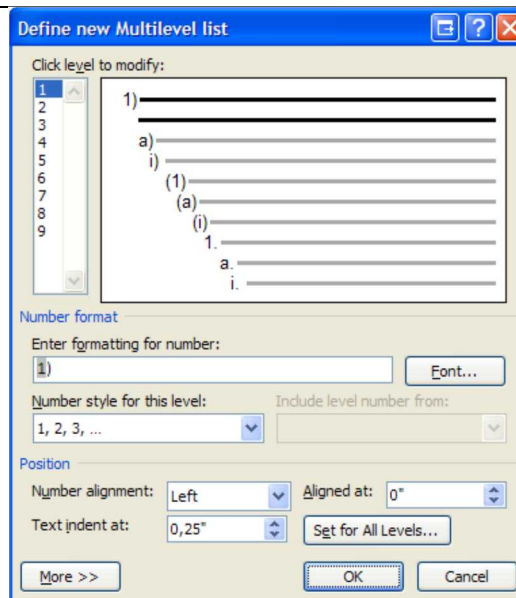
1 _____
1.1 Heading 2
1.1.1 heading 3

Meaning H1 is not taken into account for the other heading levels.



Solution:
Chose “Define New Multilevel List...”

This shows the picture on the right.

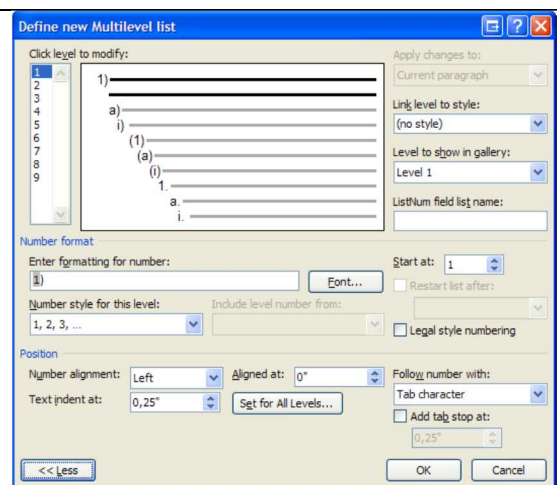


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Click **More >>**, this shows the picture on the right.

Select under “Link level to Style” the proper style (in our example Heading 1) at the correct level (1 for Heading 1) and click **OK**.



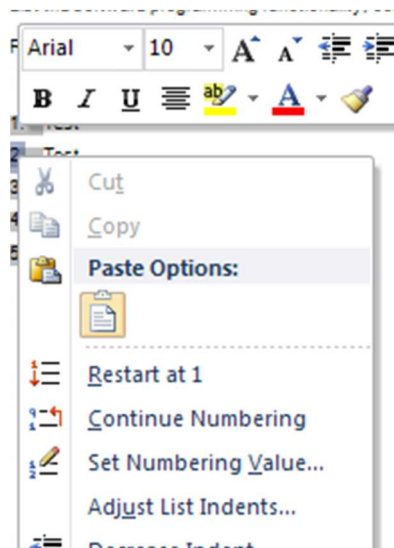
Behavior numbered lists

When inserting new lines in a numbered list or redefining numbers in a list (Restart at 1), the indentation of the numbering changes.

To correct this, you must select the whole Numbered List and apply the style again.

Or

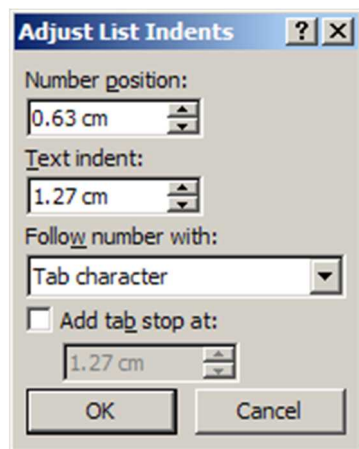
1. On a numbered list, right-click on the list numbers (not the list text).



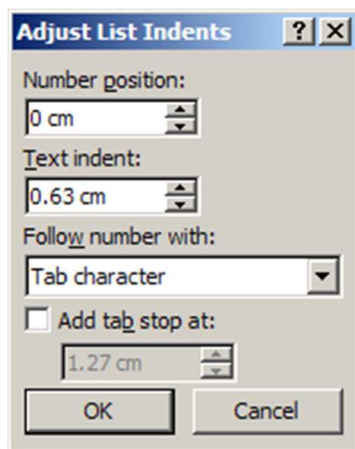
2. Select **Adjust List Indents...** from the pop-up menu.
3. In the ‘Adjust Line Indents’ window, change the **Number position**, and the **Text indent** values from 0.63cm & 1.27cm, to **0 cm & 0.63cm** respectively:

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OLD values



NEW values

Philips logo does not print in Word

Sometimes Word does not handle EPS files (format of the Philips logo) correctly, when printing the file the logo can be missing.

In PDF format it is available in the printed version.

ANR on uneven page

In FCOs the ANR must be on an uneven page.

To achieve that, change the layout of the text. Avoid empty pages!

Add hyperlink formatting to references**Makes REF fields look as hyperlinks in the Word/PDF document**

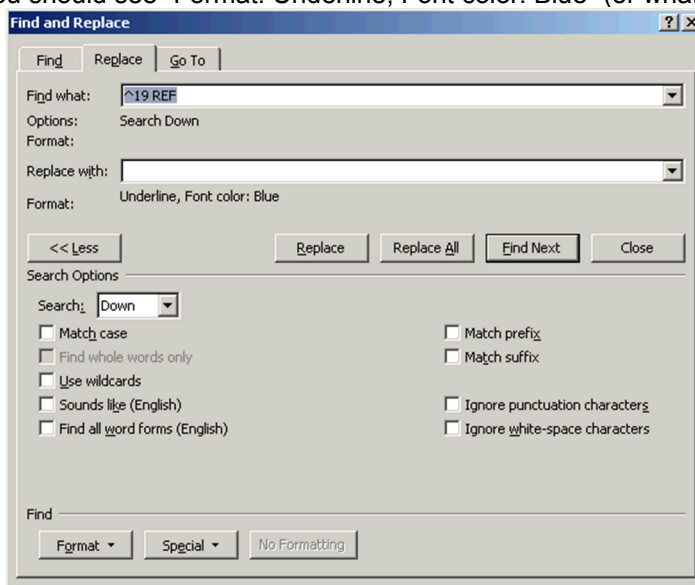
Currently cross references do not show as “internet hyperlinks” in our PDF documents. This instruction applies hyperlink-style formatting (blue and underlined) to (hyperlinked) to cross references in Word. This makes our documentation better usable for FSE's because it is immediately clear that certain text is a hyperlink to another part of the document.

1. Press **[Alt]+[F9]** to display field codes (so that Word can see REF in the fields).
2. Press **[Ctrl]+[H]** to open the Replace dialog.
3. In the “Find what” box, type **^19 REF**
4. Click **More** to expand the dialog.
5. Click **Format**, then **Font**.
6. Select the desired font formatting (such as blue and underlined), and click **OK**.

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7. Beneath the “Replace with” box, you should see “Format: Underline, Font color: Blue” (or whatever



formatting you chose), see picture:

8. Click **Replace All**.
9. Press **[Alt]+[F9]** to toggle the display back to field results.
10. Press **[Ctrl]+[A]**, then **[F9]** to update fields. You see all your cross-references with the formatting you chose.

2.4.2. General writing tips

Regardless which word processor or document management system is used make sure to stick to the following writing tips:

- Write for a trained engineer in such a way that an experienced FSE has enough on the activity flow, but the less experienced engineer can access the required details
 - Steps must be set up in a 2 level structure if possible. Check-off line for the main task and help steps for the details.
 - In an understandable logical step-by-step sequence
 - Make implicit information explicit (do not assume that certain information is known to the FSE)
 - Write in Technical English. Stick to a fixed and documented set of instructions.
 - When writing instructions:
 - start with VERB followed by a noun
 - do NOT include instructions in Notes, cautions or warnings
 - Use harmonized terminology (also part of STE)
 - Limit the amount of text mark-up in the document stick to the style in your word processor
- Avoid too many **italic**, **bold**, underlined, double underlined, **different colors** or even different **fonts**) It does **not** add to the **readability** of the **document**.
The same applies to the style of bulleted and numbered lists.
- Avoid widows and orphans
 - Write complete and correct
 - Assure the end product (final text) is reviewed and/or field tested
 - Make sure that FRU names in eSPF match the ones in your document
 - Write according to the processes of the field service engineer: if you are writing for SMI, do not give explanations but instructions.

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- If you refer to other documents be as specific as possible. Do not just indicate: available on InCenter (hyperlink it, give DMR), do not send them on another quest. Limit references as much as possible: Problem description: see attachment, write a short explanation

Examples:

- In FCO Symptom define WHAT problem is solved: do not state "New hardware is created". Do not use "improved or better" unless you can explain what has improved (e.g. speed, response times, reliability, diagnose-ability, IQ parameters and how it is perceived, workflow)

2.4.3. Word tips

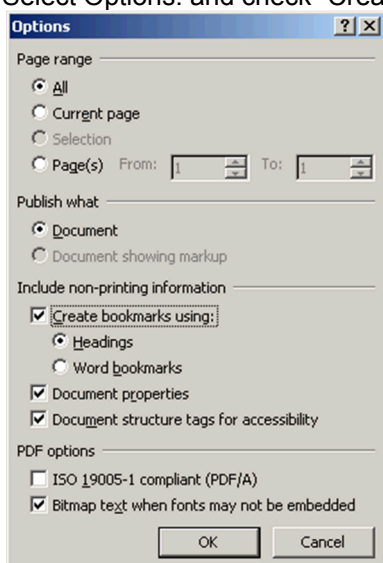
We create most of our information in MS Word, mind the following tips:

- Always use the latest Word temple.
- **For all styles: ONLY use the Service ribbon tab.**
If you do not see "Service Ribbon" in the ribbon. You do not have the correct template in use!
- Be consequent in labeling tables and figures (**Insert > Cross-reference**).
- Entering new lines
 - Use [Enter] for a new paragraph
 - Use [Shift][Enter] for a new line in a paragraph (for example within a list bullet)
 - Use [Ctrl][Enter] for a new page and not [Enter][Enter][Enter][Enter].
- Indented text:
 - Use tables to indent text or pictures.
 - Or [Shift] [Enter] in a list
- For all styles ONLY use the Service Ribbon. Check styles used in the document:
 - Text: view document in normal mode (View, Normal). The style of each line is displayed on the left of your screen. (set Tools, Options Style area width to 2 cm!)
- Table: position cursor in cell and look at the Style box in the service formatting toolbar to see the style of the text in the cell.
- Be consequent in labeling tables and figures (Insert, Caption).
- When **Autocaption** is enabled in Word, you may have to remove the captions on the first page (for Tables and figures) and modify the numbering for the following objects.
- Converting table in text (visa versa) , replacing tabs (^t) and paragraphs (^p)
- Do not use embedded objects/files in the documents, when converting to PDF that functionality is gone
- No longer use the SAP TPD footer for service documents
- No longer use "Page left blank intentionally" pages in Word.
- When a document does not have a 12NC because it is not delivered on paper, remove the "/" separating the DMR from the 12NC in the footer. Also make sure the footer text color is grey when you make modifications
- Working with a (too) large document? Maybe this can help:
 - Save in DOCX format and not in DOC
 - Do you have embedded objects (Visio etc)? Make sure to store the source files stand alone, select the object, cut and paste special as picture (use different formats to obtain best result). For mat the pictures correctly (see below)
 - Sometimes a document can "pick-up" unwanted ballast increasing the files size. To eliminate that: Select all (CTRL-A), copy (CTRL-C), open a new document and paste (CTRL-V). Store the new document and compare the file sizes with the original one.
- Drawings from our drawing office must be treated as pictures in Word.
 - To enable a proper table of contents insert a Chapter "Drawings" on Heading 1 level
 - add the drawing code and name of the drawing and apply "Hdraw" style to it (it is a heading 2 style without the chapter number). This makes them show automatically in the table of contents!
 - Insert the drawing from the drawing office (*.EMF file)

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- If Drawings are on A3 format you have to insert a section break to change the page size:
Goto the previous page, Select Page layout, Breaks, Section break at next page, go to the page you want to change and adjust via Page layout the orientation and size
- Use only 1 drawing per page
- Limit the amount of section breaks as much as possible. So try to keep A3 page together at the end, or rotate pictures, tables before inserting them on A4.
- Do NOT highlight changes with respect to previous revision, just update the “Document history”
- Make sure to run the spell checker before publication!!
- Creating PDF documents from the Word files can be done in 2 ways:
 1. Using the Acrobat tab in the office ribbon, or via Save as, “Adobe PDF”.
Takes a bit longer than option 2 but **this is the preferred way**, it converts all bookmarks and hyperlinks and contains the proper settings when documents need to be printed for production.)
 2. Via Save as, “PDF or XPS”. Make sure that Headings are converted as bookmarks:
Select Options: and check “Create bookmarks using: Headings”, and click “Publish”.



Although this is faster be aware that table of contents and other bookmarks are NOT hyperlinked.

How to handle pictures

- Preferably avoid pictures from a digital camera and use vector drawings (created by drawing office). Drawings are clearer (especially when printed), smaller in file size.
- If you use pictures from a digital camera: resize them in Paint Shop Pro to the actual format it is used in. Changing size in the Word document will still use the original picture size.
Maximum picture size W x H = 10.5cm x 14.0cm = 300 pixels x 400 pixels (1cm ≈ 28 pixels), except for screenshots. For screenshots verify if a partial screenshot can provide better information (cut and enlarge).
- Put pictures in a table to avoid it to jump around
- Text wrapping “In front of Text” of pictures is not allowed!
Preferably open a table of 1 cell and put them in the cell (always stays on that position and reduces maintenance effort!) or put Text wrapping to “In line with text”.
- DO NOT add text/arrows or other elements over or to a picture in Word. If you do and the picture is replaced, you also have to maintain the relation picture – additions. Do it in Paint shop pro!! OR cut&paste special as picture.
Another option is to select all objects and the picture and group them (allows modification afterwards).

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Will require switching from ***In line*** with text to ***Float over text***. After the grouping action set it back to ***In line***

- Keep pictures language independent, use capital letters to point out parts, refer to the letter in the instruction. Do not use part names in the picture.
Avoids maintenance and possible extra pictures in case of translations.
- If you add graphics or text to pictures make sure that they are clearly readable. For example: use different colors for line and fill pattern.
- Use *.JPG, *.GIF, *.EPS or *.EMF files as picture format (convert TIFF/BMP, especially for screenshots) to keep the document on a workable size.
- Always save the pictures in the document, do not link. When you use linked images, the links can be removed via Edit, Links: select all graphics, check save in document, update now, break links for all graphics.
- Switch off the "Auto caption" functionality. (MS Word Menu => Insert => Caption => Auto Caption: make sure that nothing is selected for all caption types).
- When captions are applied, always UNDER the picture
- Need to load many pictures in draft form that may change in the final version? Use linked images!

Insert the pictures as a link:

Insert, Text (Quick parts),filed, Links & References, Include picture [enter the filename, same folder as the Word document], check "Data not stored with document".


Overwriting the pictures with new versions now automatically updates the Word document (do not change the file name!). Before you go to the final version, you have to embed the images (store in document). Here's how:

1. With your Word document open, click the Office button*, top-left of the window.
2. Select **Prepare > Edit Links to Files**.
3. Select and highlight the images you want to convert from the list.
4. Select the option to **Save picture in document**.
5. Click the **Break Link** button.
6. Click **Yes** to confirm.

The links are removed, and the images are now embedded in your Word document. A check of the file size of the Word document should show a decrease.

- Reduce all pictures in 1 action? Select a picture, in the picture toolbar, select **Compress** icon, Select **All pictures**, **Print** and click **OK**. This reduces all pictures to the size they have been modified and can decrease the file size substantially.

Use document properties for references
Sometimes a certain term or set of words is used multiple times in a document. Instead of hand typing it each time (maintenance issue) you can also use document properties (define once use multiple times).



NOTE

This is just a quick overview. If you need more information:

- Press [F1] or Help button in Word
- Enter “document properties” in the search field
- Select the information of need (for example: “Add property information to a document”).

Add DocProperty:

- 1 Click the **Microsoft Office Button**, click **Prepare**, and then click **Properties**.
The Document Information Panel opens above your document.
- 2 Click Document Properties (left top) and select Advanced Properties
- 3 Select **Custom** tab
- 4 Enter a name and a value and click **Add** and **OK**
(e.g. DMRref1 as name and value DMR123654)

Insert DocProperty:

- 1 On the Microsoft Word ribbon, select tab “Insert”
- 2 In the section Text, select “Quick Parts”, “Field ... “
- 3 In the pop-up menu, under Categories, select **Document Information**,
- 4 In Field names select “DocProperty”
- 5 In Field properties select the Property of choice, e.g. DMRref1.
Entered value of the Docproperty will be displayed, DMR123654 in this example.
- 6 Click **OK**

Change/update DocProperty:

- 1 In the service ribbon, section fields, select Properties, tab Custom
- 2 Select the name of the property of choice in the Properties menu (e.g. DMRref1)
- 3 Change the value and click **Modify** and **OK**
- 4 To immediately change the value in the document: Select in the Service ribbon, Update Fields in the section fields.

Make DocProperty visible:

Via the following procedure you can make DocProperties visible in the document.
This triggers you not to change in the text but via above-mentioned change/update DocProperty procedure.

- 1 Click Office button, and **Word Options**

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- 2 Select Advanced
- 3 Under Show document content, for parameter Field shading select **Always**.
- 4 Click **OK**
All fields (so also inserted Docproperties with a value) are now visible.

2.4.4. Checklist before making PDFs

- 1 Has the review process been completed correctly?
- 2 Have all the changes been introduced?
- 3 Template information:
 - Have the properties, including the key words, been filled in correctly?
 - Have the correct headers and footers (odd and even), year- and version issue been used in every section?
 - Has the correct front page been used?
 - Has the correct disclaimer (CSIP 0, 1 of 2) been used?
- 4 Are there still any markings in the text that must be deleted?
- 5 Prior the complete spelling- and grammar check: select the complete document (Ctrl + a). Select **Review > Set language, U.S. English**.
Execute the spelling- and grammar check (as strict as possible) of the document (US English).
- 6 Have **Line numbers** and **watermarks** been deactivated for all sections?
- 7 Has **Track changes** been switched off or has the Review tracking view been set to **Final**?
- 8 Is the layout of the **Note**, **Caution** and **Warning** texts in accordance with the used template?
- 9 Have you activated items as Update links?
(Office button > **Word options** > **Advanced** > under **General: Update automatic links at open.**)
- 10 Have you switched off the display of the hidden text?
- 11 Click the **Update field** button on the **Service ribbon** tab.
- 12 Are all the Cross references correct? (Search for **Error!** messages).
- 13 Acrolinx IQ check performed (PTE)?
- 14 Stick to the naming conventions for (new) parts
- 15 Double-click a picture and click **Compress pictures**. Click the **OK** button.
- 16 Check the layout on your screen (for example, at 100%).
- 17 Check on applied styles:
Select View, Outline and verify if the correct styles are applied and correct if necessary. Make sure in Word options, Advanced, Display to set the "style area pane." to 2 cm.
- 18 Save the documents in ***.docx** format


2.4.5. PDF creation

During the switch-over to a new printers office, for the SIMs (HP), we encountered the following issues:

- 1 Poor quality of the Philips logo
Solution: Use EPS version.

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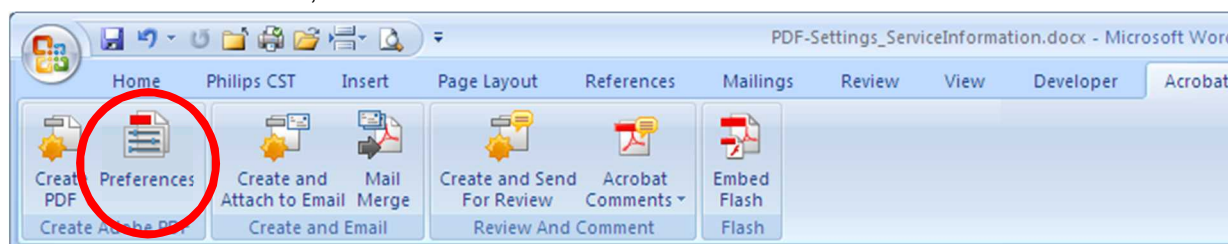
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- 2 Not all fonts embedded
Solution: Select “Embed all fonts” in PDF settings (Fonts tab).
- 3 PDF not in CMYK format (color swatch)

Solution: Select “CMYK” in PDF settings (Color tab).
- 4 Too low resolution
Solution: Select a Resolution of 600 dpi in PDF settings (General tab)

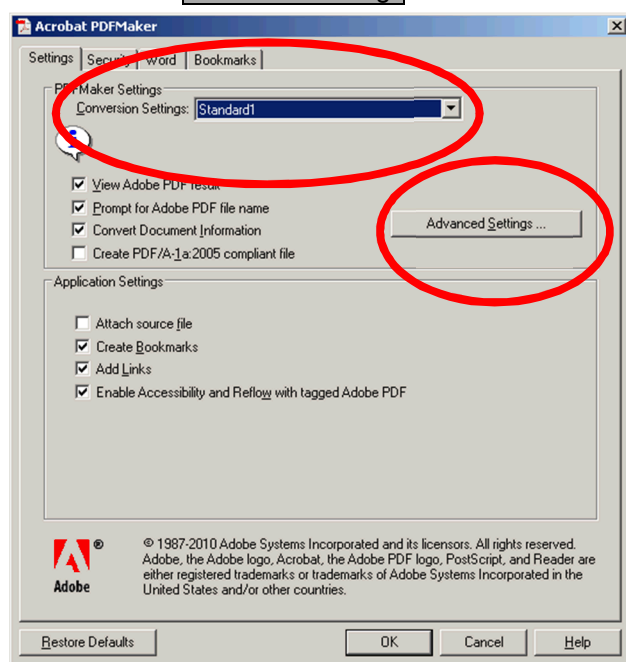
To prevent discussions with each print order, make sure that you create the PDF files with the correct PDF settings (see next chapter).

PDF settings (Word)

- 1 In the Acrobat tab, select Preferences.



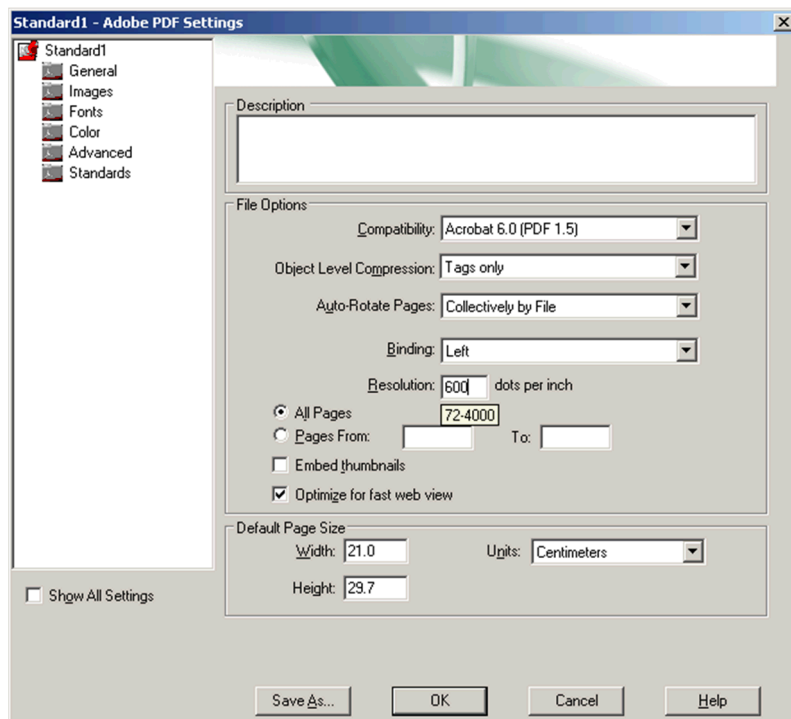
- 2 Under conversion Settings, select “Standard”
Select **Advanced Settings**.



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3 In Advanced Settings set the parameters as indicated in the pictures below:

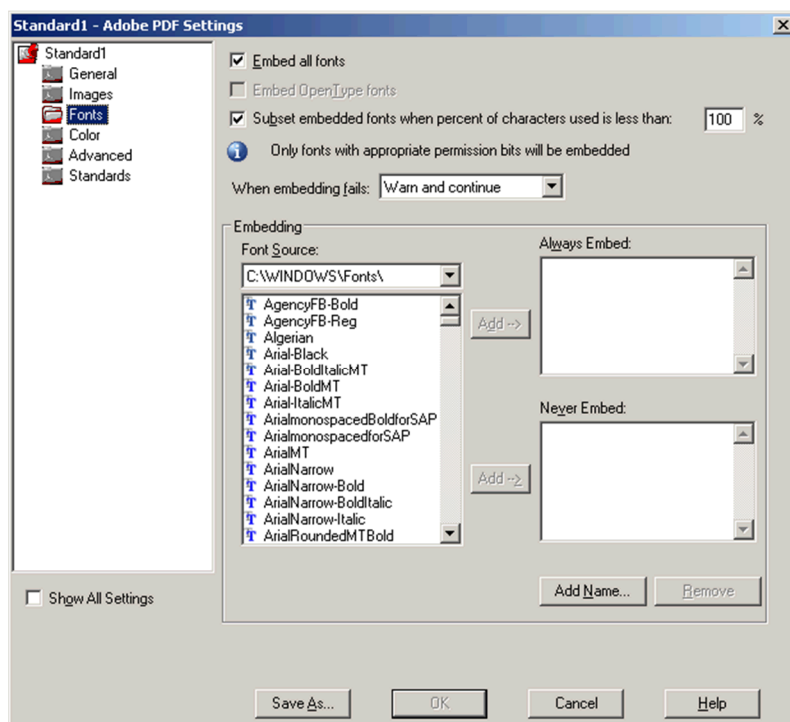
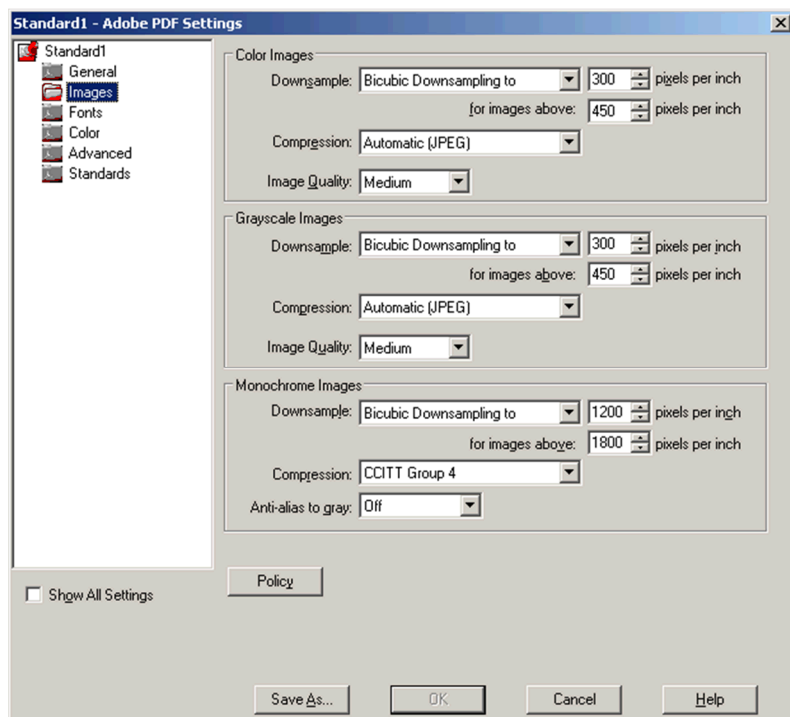


Important:

- Resolution: 600 dpi
- Page size: must be A4 (by default it is Letter)

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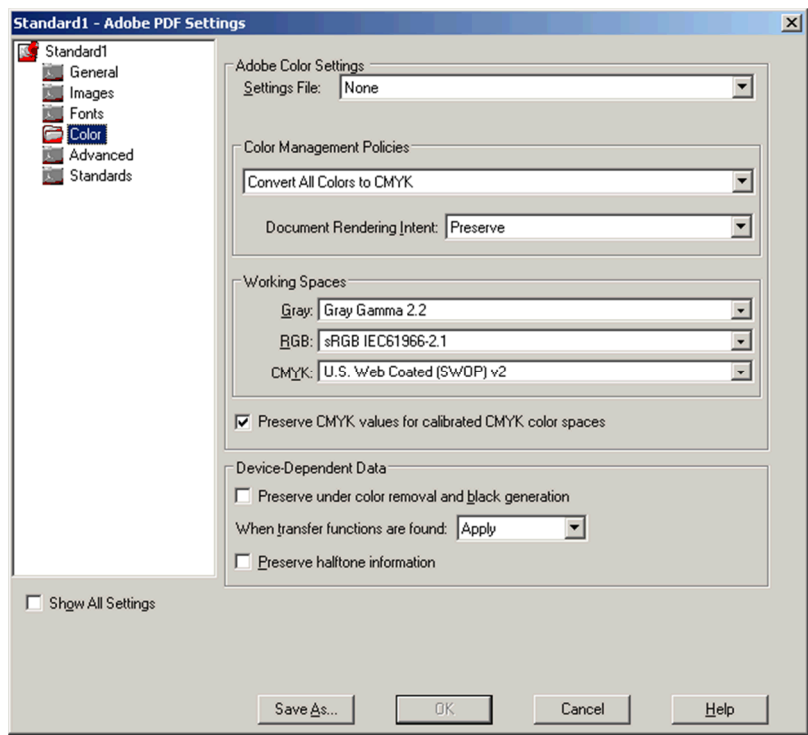


Important:

- Check "Embed all fonts", make sure that no fonts are listed in the box "Never embed"

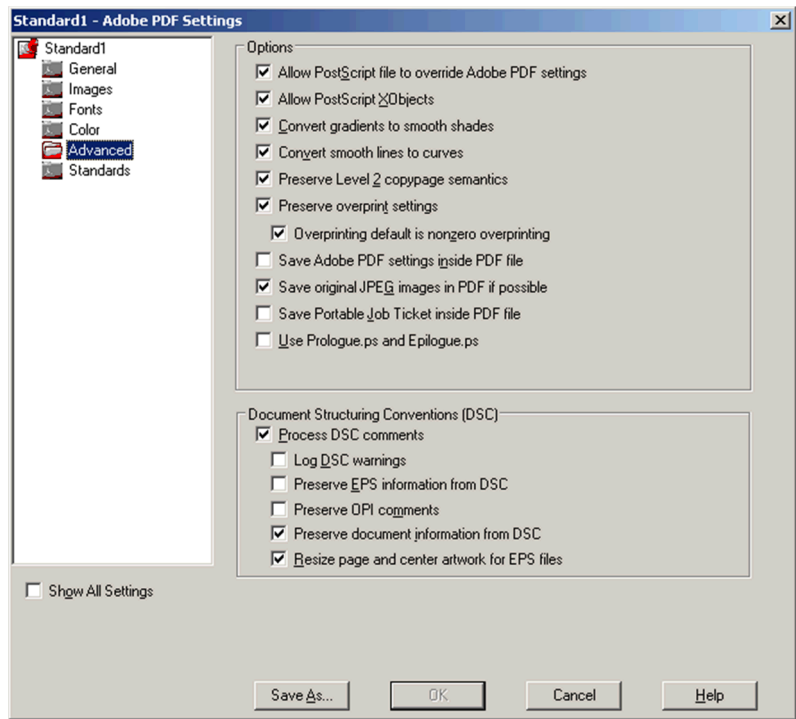
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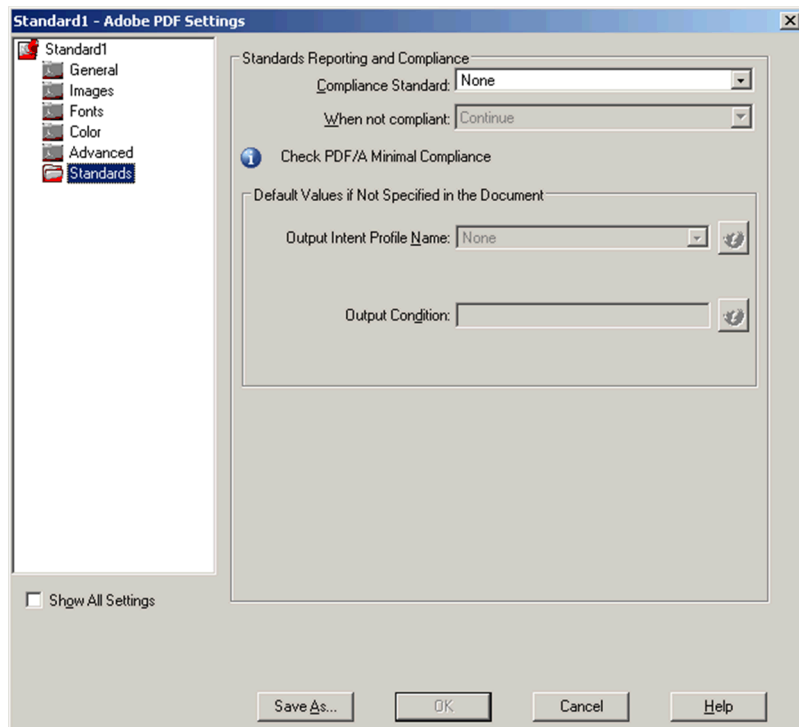
Important:

- Under color management policies, select “Convert all colors to CMYK



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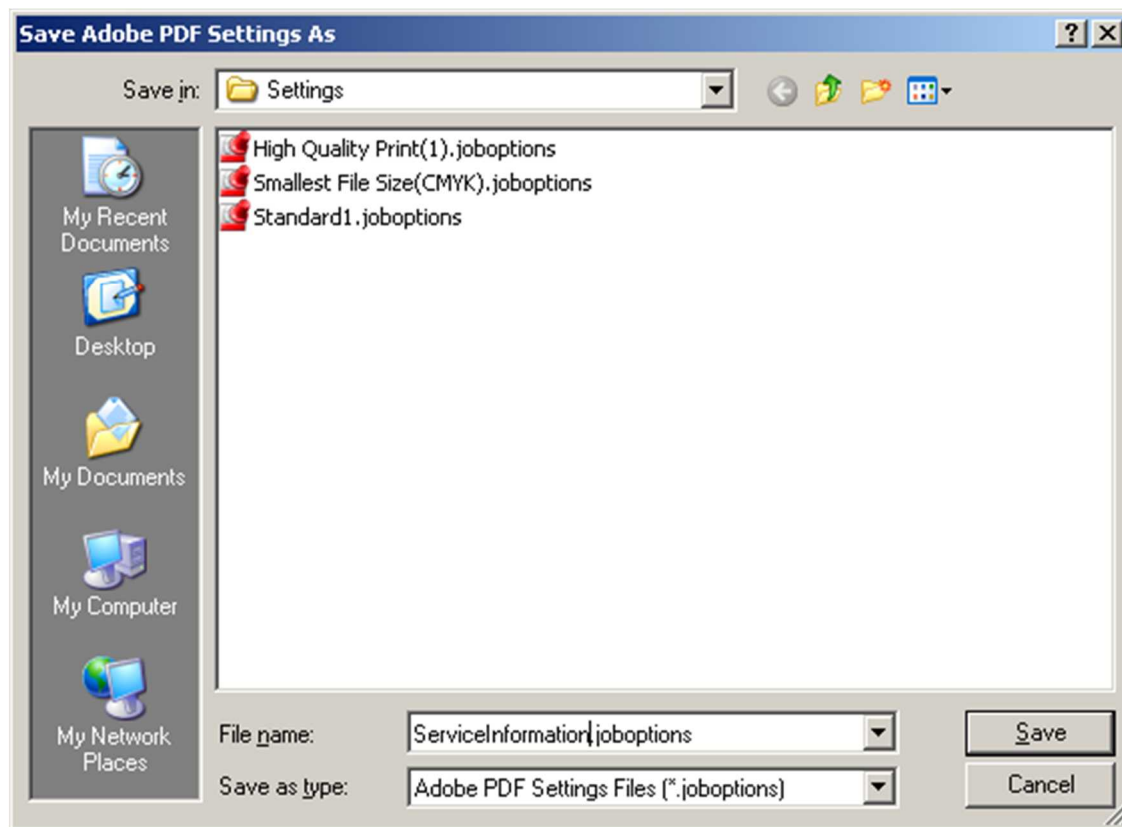
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- 4 Because you changed the settings, you must save these new default PDF Settings under a new name. For example “*ServiceInformation.joboptions*”.

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- 5 Make sure to select the stored "*ServiceInformation.joboptions*" when you have to convert service manuals to PDF. To do so: check Conversion settings in Preferences prior to the PDF conversion.

Create PDF

- 1 Make sure the correct PDF conversion settings are selected as described in "
- 2 PDF settings (Word]"
- 3 In Word, select Acrobat > Create PDF
- 4 Follow the instructions.
- 5 View the created PDF in Adobe Acrobat Pro.
- 6 Open the bookmarks (select **View > Navigation panels > Bookmarks**)
- 7 Select **Options**, click **Collapse top-level bookmarks**
- 8 Select **Options**, click **Text size**, select **Small**
- 9 Select **File, Properties...**, and in the Navigation tab, select **bookmarks panel & page**
- 10 Check the proper functioning of the hyperlinks
- 11 Quickly scan the content in the PDF file, look for:
 - o Missing or corrupte pictures/text
 - o orphans/widows
 - o missing references

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- TOC on second page
 - Correct Philips logo & logo's in note, caution, warning
 - NO image path on pictures on mouse over
- 12 Click .
- 13 If the PDF file is printed for production: select all pages and rotate the 90° CCW. This will print the SAP stamp in the left margin instead of over our CSIP and copyright message.
- 14 Save the file.

3. Definitions and Acronyms

3.1. Definitions

Term	Definition
Not applicable	Not applicable

3.2. Acronyms

Short	Long
CCW	Counter ClockWise
CSIP	Customer Services Intellectual Property
FCO	Field Change Order
PRD	Planning Reference Data
SMI	System Manual Installation
TOC	Table of Contents

4. Document Control

Process	Owner(s)
Approval	Process Owner PCP Q&R Manager
Review	Product Support Engineer Q&R Officer
Author	Casimir Treffers
Approval date	See eDMS
Effective date plan	Standard

5. Document Change Summary

Revision	Description of changes
1	Initial release



This is a representation of an electronic record that was signed electronically in our Regulated System.

This page is the manifestation of the electronic signatures used in compliance with the organizations electronic signature policies and procedures.

UserName: Dave Green (USD09722)
Title: Senior Director Engineering
Date: Monday, 18 May 2015, 07:50 AM Pacific Daylight Time
Meaning: This document has changed to Authorized status

=====

UserName: Godfried Jansen (nlv22180)
Title: Sr. Manager Q&R
Date: Tuesday, 19 May 2015, 08:35 AM W. Europe Daylight Time
Meaning: This document has changed to Authorized status

=====