Topic-Based Approach

Guidelines

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Chapter 1

Topic-Based Writing

What Is Topic-Based Writing?

Topic-based writing is a method of developing and structuring information in the form of concise pieces of information, each of which has a clear, specific and real use for the intended audience.

In addition, topic-based writing focuses on tasks rather than features.

Writing Approach	Focus
Feature-based	• What the product includes • What the product can do • Functional specifications (how a product works)
Task-based	• **How to use the product** • **How to accomplish a task** • **Purpose of a task** • **Relationship between tasks** • **Overall workflow of tasks**

What Are the Benefits of Topic-Based Writing?

Topic-based writing promotes:

- Disciplined technical writing and the elimination of "fluff"
- Consistency amongst our deliverables
- Re-use of information

  Note: For information about sharing topics, refer to the *docSource v4.0.9 User Guide.*
- Improved usability of information for the audience

What Are the Characteristics of a Good Topic?

A good topic should be:

- As precise and concise as possible
- Very clearly titled
- Covering a single concept or task
- Descriptive, procedural or referential, but never a mixture
- Illustrated with screen shots only when truly useful or necessary
- As independent of other topics as possible (cross-references excepted)
- Positioned within a logical multi-level structure

General Guidelines for Writing Topics

- Keep sentences as short as possible, without compromising what you need to say.

  Aim for a maximum sentence length of 20 words. Readability drops for every word over 12 per sentence.
- Use the simple present tense.

  This is easier to read, understand and translate. It catches and focuses the audience's attention.

  Here are some examples:
  - Correct: The standard fee setup applies.
  - Incorrect: The standard fee setup will apply.
- Use imperatives for all steps (the implied second person).

  This aims information directly at the audience and helps keep sentences short.

  Here are some examples:
  - Correct: Select the View Offers option.
  - Incorrect: The View Offers option must be selected.
- Don't use vague modifiers such as "larger", "faster" and "short".

  Vague, weak or inexact writing confuses the audience.
- Do not include marketing information in topics.

  We are not selling or promoting the product or its features.
- Use consistent terminology.

  Inconsistency is very stressful for the audience. Choose one term and use it everywhere. Never refer to the same thing in different ways.

  For example:
  - "window", "panel" and "screen"
  - "search options", "search criteria", "search fields"
  - "Confirm" and "Confirm button"

  For more information and examples, see *Consistent Terminology* on page 53.

  For more information about which terms to use, refer to the *Global Learning Services Style Guide*.
- Balance read-to-do topics (tasks) and read-to-learn topics (concepts).

Users expect (and want) procedures but they also need to know why they are performing them and how they relate to each other.

In addition, they need clear explanations of new or unfamiliar concepts and terminology.

- Make sure the topic title fits the contents.

  For more information and examples, see *Topic Titles* on page 35.

For More Guidelines...

For guidelines on writing specific topic types, see:

- *General Guidelines for Writing Concept Topics* on page 5
- *General Guidelines for Writing Task Topics* on page 6
- *General Guidelines for Writing Reference Topics* on page 9
- *General Guidelines for Writing Screen Descriptions* on page 11
- *General Guidelines for Writing Examples* on page 13

For guidelines on specific aspects of writing topics, see:

- *Using Introductory Text in Task Topics* on page 8
- *What Are the Formats for Workflows, System Flows and Processes?* on page 10
- *What Are the Title Conventions for Umbrella Topics?* on page 16
- *General Guidelines for Writing Appendices* on page 22

Chapter 2
Types of Topic

Concept Topics

What Is a Concept Topic?

A concept topic:

- Explains or describes an aspect of a business process or product that the audience needs to understand in order to use the product effectively, understand a workflow or be able to follow a process.
- Relates to a product as a whole or to a specific function or feature of the product.
- Does not explain how to perform a task using the product, even though it could explain why or when to perform the task.

  For more information, see *Task Topics* on page 6.

General Guidelines for Writing Concept Topics

- A concept topic can be either text or a graphic (such as a "system architecture" diagram).
- Consider using graphics to explain complex concepts or workflows, as they often convey the information in a more comprehensible manner.
- A concept topic should only explain a single concept.
- Users don't read blocks of text! Break up your concept topics as much as possible.
- Spell out the first occurrence of acronyms.

  Note: Spelling out the first occurrence of acronyms does not necessarily help in the case of online help, which lacks the linear, page-by-page presentation of information specific to print formats. If your document has a lot of acronyms, consider creating a glossary and including it as an appendix. In this case, you would not spell out any occurrences of acronyms.

What Are the Title Conventions for Concept Topics?

Whenever possible, use questions as titles for concept topics. The content of the concept topic should answer the question posed by the title.

Here are some examples:

- What Is Inventory Management?
- How Is Security Managed?
- How Are User Preferences Stored?
- When Are You Logged Out Automatically?
- What Information Is Shown in History?

In some cases, a question is not appropriate or too awkward to use as the title for a concept topic.

Here are some examples:

- Guidelines for Creating Accounts
- Using Introductory Text in a Workflow

Never use "How to..." in the title of a concept topic. "How to..." is reserved for task topics. See *Task Topics* below.

Examples: Concept Topics

Example 1

What Is History Search?

All changes to data stored in the system are logged and can be displayed using the History feature. Data is stored in the system for two years.

You can find a link to the History tab on the Home Page, and in several other tabs. You select the type of history data that you want to display using filters in the History tab, select a date range of a maximum of 15 days, and then click on Search.

You can display history for:

- Users: creation, deletion, update, freezing, unlocking, login areas, security settings and default office
- Organization tree: organizations, units or offices and office masks

Task Topics

What Is a Task Topic?

A task topic contains a series of steps that the audience must perform in order to achieve a required result.

A task topic does not explain why or when a task needs to be performed; this is either obvious or covered in concept topics. See *Concept Topics* on page 5.

General Guidelines for Writing Task Topics

- A task topic should only explain how to perform a single task.
- A task must consist of numbered steps.
- If there are a large number of steps (more than 10):

  - Consider splitting the task into sub-tasks in separate topics.
  - Review the steps to see if any can be combined.
  - Consider using a workflow or process flow. See *Workflows, System Flows and Processes* on page 10.
- Avoid too much information in any single step. If the step is very complicated, consider breaking it down into several steps or explaining it in a separate topic. Topics and steps should not be broken down just because they look big; the writer should use common sense.
- In steps, place the action after the prepositional phrase, if present.

  Examples:

  - "From the File menu, select Open" instead of "Select Open from the File menu."
  - "In the Users screen, click on the Create button" instead of "Click on the Create button in the Users Screen."
- If you need to explain why or when a task is performed, use a separate concept topic. See *Concept Topics* on page 5.

  The concept and task topics can then go under a gerund ("-ing") heading.

  Here is an example:

  H1 Installing the ASCII Viewer

  H2 Why Install the ASCII Viewer?

  H2 How to Install the ASCII Viewer
- If there are prerequisites for a task, use a separate concept topic for them. See *Concept Topics* on page 5.
- Only mention the result in the final step of a task if it is absolutely necessary; for example, when the result is not displayed on the screen or when multiple areas are affected.
- Avoid "hard coded" cross references to other step numbers within the same task; "repeat steps 4 to 6", for example.

  If the task is subsequently updated with additional steps, or steps are removed, the cross reference may require updating as well and this could easily be missed.

  For an example of how to avoid referencing numbered steps, see *Example 3* on page 31.

Template Tip

Use the NoteIndent style when adding a comment or note that belongs to a specific step.

What Is the Title Convention for Task Topics?

Always use a title starting with "How to".

Here are some examples:

- How to Find Properties
- How to Display Payment Details
- How to Book a Car
- How to Save a Fare

- How to Search for a Hotel with an Active Booking File

Handling Single-Step Task Topics

- Use a title starting with "How to...", as for any other task topic.
- Use normal text for the single step; do not number it.

Using Introductory Text in Task Topics

Introductory text should only be used when it is absolutely necessary. In most cases, the title should provide the introduction to the steps contained in the task. You can also consider putting the introductory text in a separate concept topic.

Note: This includes avoiding introductory phrases such as "Do the following:" and "To ...:"

Example: Avoiding Introductory Text

Instead of starting the "How to Install the ASCII Viewer" with an explanation of why the user needs to install the viewer, create an extra topic called "Why Install the ASCII Viewer?".

Handling Cryptic Entries in Task Topics

If you need to explain cryptic entries in the topic-based approach, use the ""How to" convention in the topic title and a two-column table, as shown in the following examples.

Examples: Task Topics for Cryptic Entries

How to Request an Availability Display

How to...	Enter
Request a neutral availability display for a flight or rail journey arriving in Milan. **Note:** The default originating city is the city location that is set up in the terminal ID where the request is made (usually, the city of the Office ID). The default date is today's date, unless you enter a specific date of departure.	**AN MIL**
Request a neutral availability display, with a flight or rail journey arriving in Milan on 1 December at 1500.	**AN 1DEC MIL 1500**
Request a neutral (dual-city) availability display for a round-trip journey between Rome and Milan, departing on 1 December and arriving in Milan at 1500, and returning on 14 December. **Note:** If you omit the return date, the system automatically displays return flights departing one hour before 1800 on the same day.	**AN 1DEC ROMMIL 1500 * 14 DEC**

How to Get Detailed Information About Your Rail Trip

How to...	Enter
See detailed information about segment 2 from an availability display.	**DO2**

How to Book a Rail Segment

How to...	Enter
Sell a single TRN segment from a single availability display.	**SS1Y3** (Sell 1 seat in Y class from option 3 in the availability display.)
Sell one seat on each leg of a round trip from a dual availability display.	**SS1Y4*12** (Sell 1 seat in Y class from option 4 in the availability display for the outbound trip and 1 seat in Y class from option 2 for the inbound trip.)

Reference Topics

What Is a Reference Topic?

A reference topic contains detailed information that is not necessary for the audience to understand a concept or task but can be consulted if required.

Where to Place a Reference Topic

Normally, reference topics belong in an appendix, cross-referenced from their associated concepts and task topics. You may need to place a reference topic in the body of the document, however, if the reference information needs to be more closely associated with a concept or task topic. This is particularly true for context-sensitive help.

General Guidelines for Writing Reference Topics

Use tables whenever possible for reference information.

What Is the Title Convention for Reference Topics?

If a reference topic is outside an appendix, use a title starting with "Reference:"

Here are some examples:

- Reference: Status Codes
- Reference: Search Options
- Reference: Customer Types

Workflows, System Flows and Processes

What Are Workflows, System Flows and Processes?

Any of the following:

- Workflows, system flows and process flows are procedures in which the individual steps are high-level and represent tasks that require more detailed explanation.
- A workflow consists of steps performed by the user.
- A system flow consists of steps performed by the system.
- A process flow could include steps performed by different entities but these must be clearly indicated.

All three flows provide the audience with an overview of a process with sequential steps.

For more information and examples, see *Workflows/System Flows/Process Flows* on page 56.

What Are the Formats for Workflows, System Flows and Processes?

Any of the following:

- A numbered list, with cross-references to each task or concept for more detailed information
- A table, with cross-references to each task
- A graphic such as a flow-chart, with or without cross-references to each step

When to Use a Workflow, System Flow or Process?

Use a workflow, system flow or process flow when there are multiple tasks that the user needs to perform, or the system performs, in a specific sequence

In some cases, a workflow may be a quick and sufficient solution for an audience that does not need the detailed task explanations.

What Is the Title Convention for Workflows, System Flows and Processes?

Use a title starting with "Workflow:", "Process:" or "System Flow:" followed by the name of the flow, which would preferably be the title of the umbrella heading.

Here are some examples:

- Workflow: Booking a Hotel
- Process: Customer Transfer

Do NOT include "How to..." in the title of a workflow or process flow; "How to..." is reserved for individual tasks. See *Task Topics* on page 6.

Using Introductory Text in Workflows, System Flows and Processes?

As for individual tasks, avoid introductory text. The title should provide the introduction to the flow.

Examples

Example 1

Example: Workflow Topic

Workflow: Creating a GEF Export

1. Define the statistics period that needs to be used for the export.
   See *Defining the Statistics Period.*
2. Define the statistics that need to be used in the export.
   See *Defining the Statistic.*
3. Link the statistics to a customer and run the export.
   See *Linking and Printing the Report.*
4. Optionally you can automate the export.
   See *Creating an Automatic Process.*

Screen Descriptions

What Is a Screen Description?

A screen description provides detailed information about the elements of a screen.

When to Use a Screen Description

Screen descriptions should only be used when absolutely necessary. They are more suited to feature-based writing, which we are trying to move away from.

They may be necessary when a screen has a complicated layout or the purpose of its elements is not obvious. In this case, you may need to provide descriptions of multiple input and output fields, toolbar options, buttons, and so on. But remember that it is always better to explain an option or field when the audience needs to use it, i.e. in the context of a task.

General Guidelines for Writing Screen Descriptions

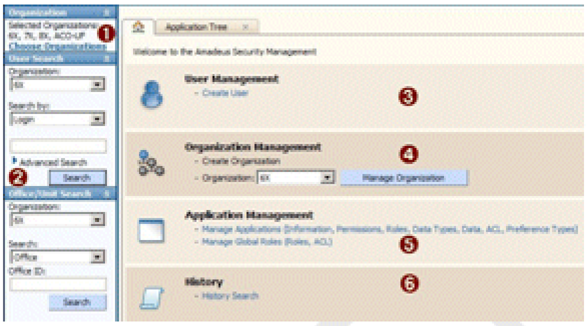
- Use a table or a table with call-outs from a screenshot.

- If you need to include multiple screen descriptions, consider grouping them together in an appendix, cross-referencing them from the relevant concepts and tasks.

Examples

Example: Screenshot with Call-outs

Example: Amadeus Security Management GUI



1. Organization selection
2. User and office or unit search boxes
3. User management
4. Organization management (organization tree)
5. Application management (roles, ACLs, preferences etc)
6. History search

Example: Screen Description Using a Table

Option	Result
Use history directory of the file system	The handoff files are stored directly in the history directory of the file system.
Store handoff files in db (keep no copy of the ASCII file)	The handoff files are stored in the CLOB of the Agency Manager database.
Store handoff file in db and keep copy of ASCII file	The handoff files are stored in the CLOB and a copy of the CLOB data is formatted into and ASCII file and stored in the history directory.
Store handoff file in db and keep concealed copy of ASCII file	**Note:** **Switch ace368** must be set to 2 if you want to use this option. The handoff files are stored in the CLOB, and a copy of the CLOB handoff file data is formatted into an ASCII file and stored in the history directory. The credit card data will be concealed both in the CLOB and the history directory.
Use history directory and keep concealed copy of ASCII file	**Note:** **Switch ace368** must be set to 2 if you want to use this option. The handoff files are formatted into an ASCII file and stored in the history directory. The credit card data will be concealed.

What Is the Title Convention for Screen Descriptions?

Use a title starting with "Description:" followed by the name of the screen.

Here are some examples:

- Description: Customer Acceptance Screen
- Description: Confirmation Screen

Examples

What Is an Example?

An example provides a practical scenario to enhance the audience's understanding of a concept, task, workflow or process flow.

General Guidelines for Writing Examples

- An example must only be an enhancement to its related topic. The topic must still make sense without the example.
- Always use realistic data in your examples.
- You are not obliged to make separate topics of your examples but example topics allows for better and cleaner sharing across projects.

  In projects such as SELL Classic and Connect, the text might be identical but only the interface changes. Therefore, at the end of a concept or task topic, we include the screen shot but as a separate Example topic.

What Is the Title Convention for Examples?

Use a title starting with "Example:". Consider adding the title of the umbrella heading.

Here are some examples:

- Example: Handling Fees with a Fee Container without Confirmation
- Example: Completing and Confirming the Reservation
- Example: Storing Your Negotiated Rates
- Example: Displaying Your User Settings

Videos

A video can be included as part of a concept or task topic or it can be a separate concept or task topic on its own.

In either case, the following format for the video link is recommended, where **Launch** is the link to the video.

Video: How to Make an Air Booking

Launch

Chapter 3
Structuring Topics

Methods of Structuring Topics

Why Is Structure Important?

Content without structure is almost useless. Poor organisation:

- Confuses the audience
- Makes it difficult for the audience to find information
- Indicates that the writer may not understand the content

What Are the Characteristics of a Good Table of Contents?

- Logical grouping of topics based on nesting and subsets
- Easy for audience to find what they're searching for
- Multi-level (topics and subtopics)

  Users subconsciously understand the relationship of elements based on white space and indents.
- Maximum of 10 related topics together at the same level

Grouping Concepts and Tasks

- All concepts can be grouped in one place at the beginning of the document. Concepts that apply to the entire product or business should be grouped together.

  Or
- Concepts can be spread throughout the document with the tasks to which they are relevant. Concepts that only apply to specific tasks should be grouped with those tasks.

Remember that items that are close together have an implied relationship for the audience.

Basic Structure for Guides in AGM Documentation

1. Before You Start

2. What Is – explains the conceptual information
3. Setting Up – explains the setup
4. Using – explains the functionality

Using Umbrella Topics

What Are Umbrella Topics?

Umbrella topics are heading-only topics that you can use to group a number of subtopics.

Umbrella topics may contain a list of cross-references but otherwise have no content of their own. See *Linking Umbrella Topics to Their Subtopics* below.

Template Tip

Be sure to include a spacer (style Char-Hidden) after every empty umbrella topic, to prevent widow/orphan paragraphs.

What Are the Title Conventions for Umbrella Topics?

Use gerunds ("-ing") in the titles of umbrella topics.

Here are some examples:

- Managing a Booking
- Logging In
- Setting Up Supplier Matching
- Getting Started

Never use "How to..." in umbrella topic titles.

Linking Umbrella Topics to Their Subtopics

Note: For information about using cross-references in general, see *Using Cross-references* on page 22.

Why Link Umbrella Topics to Their Subtopics?

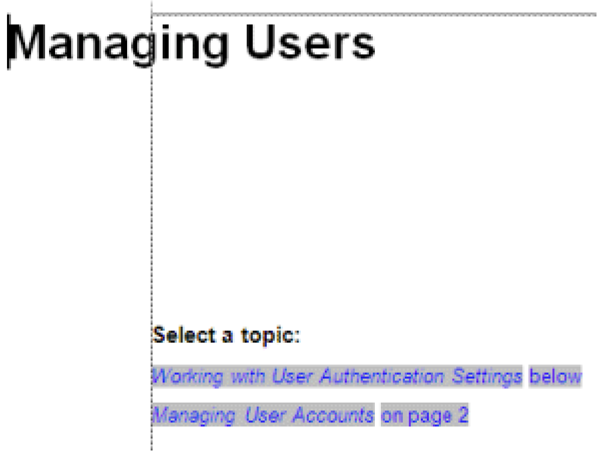
When an umbrella H1 or H2 topic is displayed in online help, only the topic title appears in the help window. The audience is only aware of existing subtopics (H2 or H3) in the TOC structure.

Collapsible H4 headings also work well in online help, and eliminate the need to link umbrella topics to their subtopics.

How to Use Cross-references to Link Heading Levels

- If a book is used to produce online help only, add a list of cross references to all the subtopics in the umbrella H1 or H2 topic.

Example: Links to subtopics in an umbrella H1



Caution: Never mark these cross-references as Web-only. This is a technical restriction of the software and will result in a corrupted topic!!

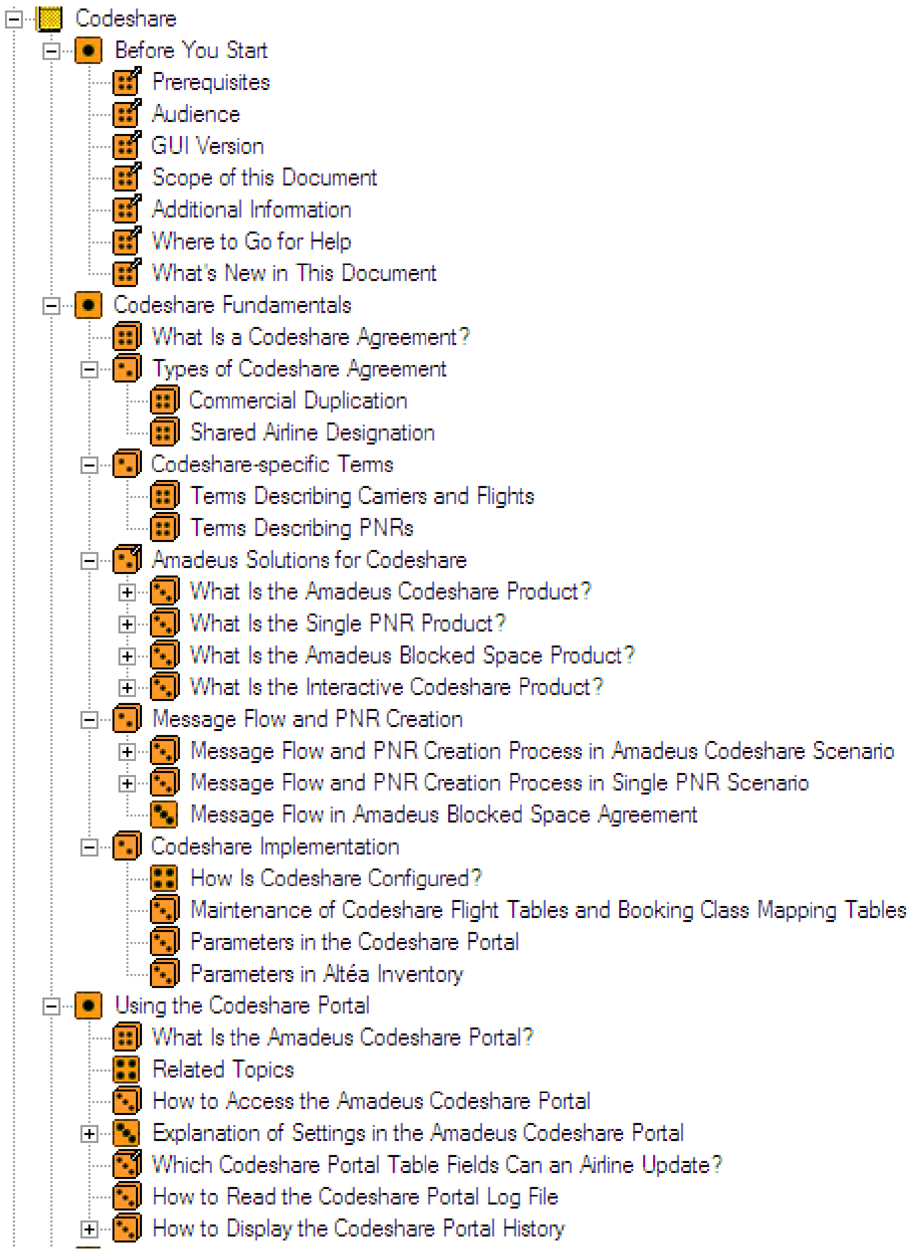
- If a book is used to produce both online help and a print output, create a Related Topics topic (H4) that sits directly under the umbrella topic and set its output type to Web Only.

For more information and examples, see *Umbrella Topics and Cross References* on page 33.

Examples

Example 1

Example: Good Structuring of Topics



What Structure Works on Paper and in Online Help?

Depending on the requirements of your documentation project, you may need to produce a print output, or online help, or both.

If you are producing both, you have a choice between:

- Creating two books in docSource, one for the print version and one for the online help.

  Or

- Creating a single book in docSource, from which two different outputs will be produced at publication time.

DocSource supports both methods, and both are valid, yet each one requires a different approach:

1. If maintaining two books:
   - Topics that are relevant in both outputs are shared between the two books.
   - The online help and the print version can be structured in very different ways.
   - If a topic is relevant in only in one output, it is included only in the relevant book.
2. If using a single book:
   - Each time you create a topic, you need to consider how it will appear in each output.
   - The online help and the print version share the same structure.
   - If a topic is relevant in only one output, change the Output Type setting to either Print Only or Web Only.
   - If a diagram is relevant only in the print version, apply the Char-PrintOnly character style to the diagram and accompanying text.
   - If text is relevant only in help pages, apply the CharWebOnly character style to that text.

   Caution: Due to current docSource limitations, you cannot apply the Char-PrintOnly or CharWebOnly character styles to cross references. If you do this, the entire topic will become corrupted in docSource and you will no longer be able to open it.

You must decide in the early stages of your project which method is the most suitable, considering the possible advantages or constraints of each approach.

Here are typical questions to be considered.

Table: Advantages of a Shared Structure Versus a Separate Structure

Question	**Advantages of a Single Book (Shared Structure)**	**Advantages of Separate Books (Separate Structures)**
Is the audience for the online help the same as for the print version?	If it is, they require the same information, which can therefore be structured in the same way.	If it isn't, they may require different information, presented in a different sequence.
Does the level of detail vary much between the two outputs?	If not, it is simpler to maintain only one version.	If it does, it may be easier to maintain two versions rather than have to split similar topics to provide different levels of detail.
Is it easy to chunk the information that is relevant only in one or the other output?	If so, you can change the Output Type setting of the relevant topics to Web Only or Print Only.	If not, it is best to create different versions of similar topics that vary in content.

Question	Advantages of a Single Book (Shared Structure)	Advantages of Separate Books (Separate Structures)
Will the online help follow the flow of the GUI?	If it does, the flow of the help, being constrained by the GUI, may be inappropriate in a printed guide. In that case, separate structures are preferable. **Note:** If the help is context-sensitive, but if the GUI enforces a predefined workflow (as for example in a wizard) a single book may be suitable.	If not, information can be structured in a way that is logical and works in both print and online help outputs.
Will you (or another writer) need to maintain the project on a regular basis because of cyclical releases?	If so, a single book eliminates the risk of forgetting to share new topics that are relevant in both outputs.	If not, the creation of the duplicate book can be done as a one-off effort, with some risk of forgetting topics but with the flexibility of applying different structures.
Is the project likely to be very large?	The larger the project, the more it makes sense to maintain only one version.	If it's small, flexibility may be more important than convenience.
What is the priority of the project you are working on? **Note:** If you are not sure, ask you manager.	This is a lower-cost solution and may be appropriate for the product.	This is a higher-cost solution with heavier maintenance requirements.

Working with Heading Levels

Heading Level Properties

Table: Heading Level Properties

Heading Level	Properties
Heading 1 (H1)	• Appears in the TOC • Can be cross-referenced • Much larger font size than topic text • In print, appears out dented from the topic text
Heading 2 (H2)	• Appears in the TOC • Can be cross-referenced • Larger font size than topic text • In print, appears out dented from the topic text • Not shown in online help when the parent (H1) topic is displayed

Heading Level	Properties
Heading 3 (H3)	• Appears in the TOC • Can be cross-referenced • Larger font size than topic text • In print, appears out dented from the topic text. In online help, appears in capital letters • Not shown in online help when the parent (H2 or H1) topic is displayed
Heading 4 (H4)	• Does not appear in the TOC • Can be cross-referenced **Note:** In online help, when you cross-reference an H4 topic, the target is the help screen of the parent H3 topic. • Slightly larger font size than topic text • Appears in line with the topic text • Always shown in online help when the user displays the parent (H3, H2 or H1) topic • Cannot be displayed independently in online help • Content is collapsible
Heading 5 (H5)	• Does not appear in the TOC • Does not appear in the docSource tree structure as a separate topic • Cannot be cross-referenced • Same font size as topic text, but bold and with different spacing • Appears in line with the topic text • Always shown in online help when the parent (H4) topic is displayed • Cannot be displayed independently in online help • Content is collapsible

Using Collapsible Text

What Is Collapsible Text?

In online help, collapsible text is hidden until the user clicks on its associated heading.

Why Use Collapsible Text?

- Reduces the initial amount of information shown on a help screen
- Allows the user to display relevant topics only
- Adds to the interactivity of online help for the audience

When to Use Collapsible Text

The text of any topic can be collapsible but it should be used for the following:

- All topics at H4 level
- Tables
- Screen shots

Skipping Heading Levels

There are two scenarios in which it makes sense to skip heading levels.

- When you want to use a series of H4 topics under an H1 or H2 umbrella heading. This works particularly well in online help, where a series of collapsible H4 topics appear together on the same help screen.
- When you are creating a course guide and want the table of contents to align with the course objectives. In this case, using H4 topics produces a shorter table of contents.

If you decide to skip heading levels, make sure that:

- There is more than one H4 topic.
- There is a maximum of 5-7 H4 topics.
- They are concise.
- It makes sense to keep and show them together.

Otherwise, you should not skip heading levels. It makes no sense to skip from an H1 to an H3, for example.

Working With Appendices

General Guidelines for Writing Appendices

- Use appendices for reference information and screen descriptions.
- Make sure that the information is truly useful.
- Even though there are no specific conventions for headings in appendices, make sure the headings clearly identify the information.
- Do not include the word Appendix in the title.

DocSource Tip

In docSource, set the Chapter Style for the appendix topic to Appendix.

Using Cross-references

Which Topics Can Be Cross-referenced?

You can cross-reference any topic with heading level H1, H2, H3 or H4.

When to Use Cross-references

Only use a cross-reference when there is useful and significant information available in the referenced topic.

Avoid overusing cross-references. Never include a cross-reference after each step of a task. Instead, group together the cross-references under a More Information or Related Topics H4 topic.

Remember that if you include a cross reference, it may be irrelevant when the topic is shared in a different context where the target of the cross reference is not present.

Note: For information about sharing topics, refer to the *docSource v4.0.9 User Guide*.

What Happens When a Cross-referenced Topic is Not Present?

- In online help, broken cross references are removed automatically.
- On paper, a broken cross-reference error appears in the document in edit mode but is removed automatically when you or preview or publish the document.

Template Tip

Broken cross references are only handled correctly if you have applied the correct styles. For more information, refer to the *docSource User Guide*.

Cross-referencing Other Documents

If you need to use a "hard-coded" cross-reference to another document:

- Be sure that there is useful information available in the referenced document.
- Verify the exact title of the referenced document.
- Add the name of the referenced document in italics.

For more information, refer to the *Global Learning Services Style Guide*.

Using Cross-references in Multibooks

DocSource allows you to create cross-references from one book to another.

If a single source of documentation provides both online help and printed output, cross-book links have to be duplicated.

One instance of the cross-reference refers to the user guide title. It is hard-coded (apply italics and print-only char. style) in the source and as a result it is visible only in the printed version.

The other instance of the cross-reference uses the docSource feature (insert X-ref, apply X-ref style) to point to a specific topic, and as a result it works as a hyperlink in the online help.

Example in source file:	**Output in pdf file:**	**Output in help file:**
For more information, refer to the *Amadeus Altéa Inventory - Seating User Guide* *How to Display the Aircraft Library*.	For more information, refer to the *Amadeus Altéa Inventory - Seating User Guide*.	For more information, refer to *How to Display the Aircraft Library*.

Chapter 4

Updating Non-Migrated Documents and Help

What Are Non-migrated Documents?

A non-migrated document is one which was written before we adopted the topic-based approach.

Adding New Chapters or Sections

- Use topic-based writing and structuring whenever possible and practical.
- Avoid following a previous approach in your new material unless unavoidable; for example, the material is short-lived and will never be fully migrated.

Updating Existing Chapters or Sections

When time allows, migrate the entire chapter or section to topic-based writing. If you have any doubts as to whether or not you should migrate a section or chapter, consult your team leader.

What Are the Possible Issues?

The mixture of approaches within the same chapter, document or online help package may result in inconsistencies.

Appendix A

Examples

Example 1

Example: Original Version

Starting Amadeus AllStats{ XE "Starting Motive" }

Starting Amadeus AllStats is a three-step process:

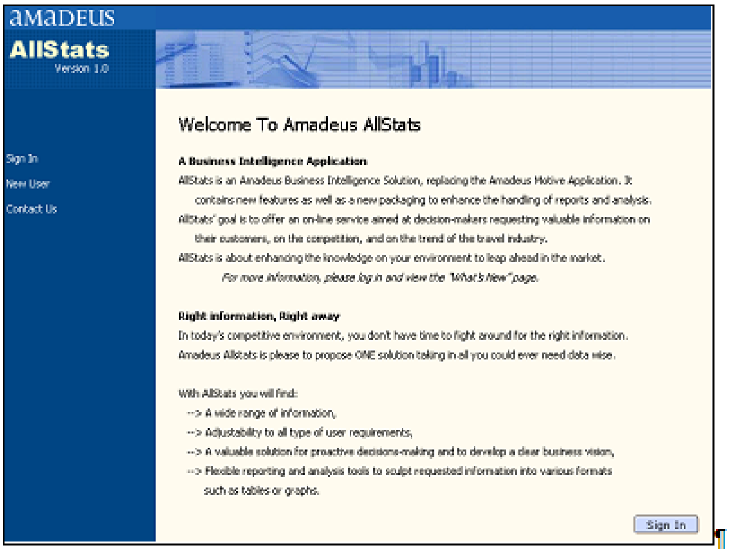
1. You connect to the Amadeus AllStats Web site.
2. If you are a new customer, you subscribe on line to Amadeus AllStats.
3. If you know your user name and password, you enter your sign-in details.

To connect to the Amadeus AllStats Web site, follow these steps:

1. Launch your Internet browser.
2. Enter the following address in the address bar: **http://AllStats.amadeus.net**.
3. Press Enter.

Note: Amadeus AllStats can only be run with Microsoft Internet Explorer 5.0 or higher.

Once you are connected to the site, the home page is displayed:



On the left-hand part of the home page, the navigation bar lists your options. To access the option concerned, click on the item in the navigation bar.

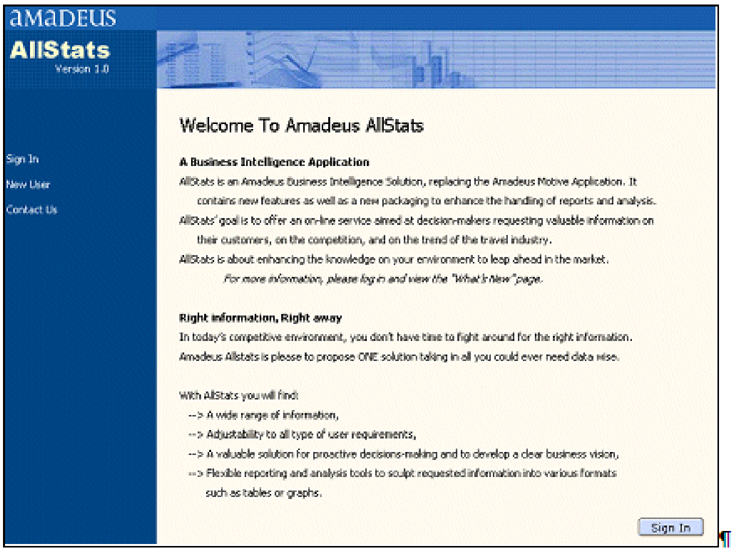
If you have already subscribed to Amadeus AllStats, you can then select the Sign In menu and enter your details to access the secure areas of Amadeus AllStats. If you are not yet a Amadeus AllStats customer, click on the New User link to subscribe.

Note: To switch in and out of full-screen view, press the **F11** key.

Example: Improved Topic-based Version

How to access AllStats¶

1. Launch your Internet browser.¶
2. Enter the following address in the address bar: **http://AllStats.amadeus.net**.¶
3. Press Enter.↵
   Once you are connected to the site, the home page is displayed. On the left-hand part of the home page, the navigation bar lists your options.¶



¶

Note: Amadeus AllStats can only be run with Microsoft Internet Explorer 5.0 ¶

4. If you have already subscribed to Amadeus AllStats, select the Sign In menu and enter your details to access the secure areas of Amadeus AllStats.↵
   If you are not yet a Amadeus AllStats customer, click on the New User link to subscribe.¶

To switch in and out of full-screen view, press the **F11** key.¶

Example 2

Example: Original Version

Adjacency Group Linking Rule

To respond to a seat request when several passengers are travelling together, the system finds the best seats available thanks to an algorithm that takes into account the adjacency factor of the seats surrounding a given seat.

The Adjacency Group Linking rule enables the airline to customize the definition of these adjacency factors.

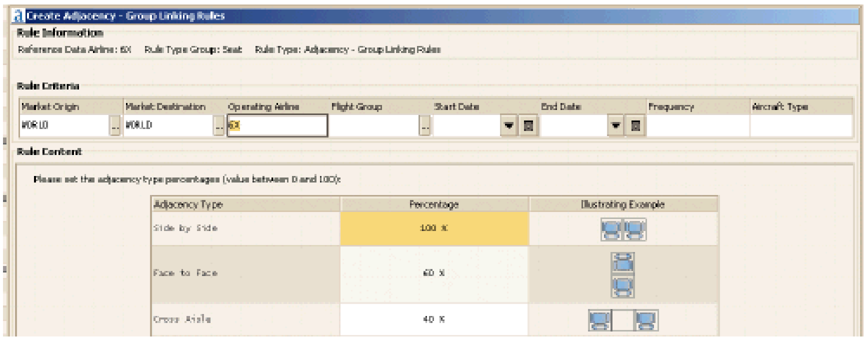
The system starts by finding the best seat for the first passenger based on which seat is surrounded by the greatest number of available seats. It then proceeds to find seats for each of the accompanying passengers in turn, using the Adjacency Group Linking rule to evaluate the adjacency factor of each surrounding seat.

For more information on the seat allocation process applied by the system, please refer to *Seat Allocation Process* on page 6.

To modify the adjacency percentage values, update the factors set by default in the rule.

Note: If no rule has been defined, the default values are applied.

Illustration: Adjacency Group Linking Rule Screen



Example: Improved Topic-based Version

Adjacency Group Linking Rule

Rule Purpose

To respond to a seat request when several passengers are travelling together, the system finds the best seats available thanks to an algorithm that takes into account the adjacency factor of the seats surrounding a given seat.

The Adjacency Group Linking rule enables the airline to customize the definition of these adjacency factors.

How the Rule Works

The system starts by finding the best seat for the first passenger based on which seat is surrounded by the greatest number of available seats. It then proceeds to find seats for each of the accompanying passengers in turn, using the Adjacency Group Linking rule to evaluate the adjacency factor of each surrounding seat.

This rule is used by the Seating Logic rule, in which a weight is assigned to the Adjacency Goup Link rule to tailor the seat allocation process. Refer to *Seating Logic Rule*.

For more information on the seat allocation process applied by the system, please refer to *Seat Allocation Process*.

How to Define the Rule

To modify the adjacency percentage values, update the factors set by default in the rule.

Note: If no rule has been defined, the default values are applied.

Table: Adjacency Group Linking Rule Contents

Seat Adjacency Type	Illustration	Percentage
Side by side	A B 1	Set a value between 0 - 100 Default value: **100**
Face to face	D 1 2	Set a value between 0 - 100 Default value: **60**
Cross aisle	A B 1	Set a value between 0 - 100 Default value: **40**
Front back on an edge (both window or aisle)	A C 1 2 or	Set a value between 0 - 100 Default value: **35**

Example 3

Original Version

1. How to Report Time Spent on a Record
2. Open Internet Explorer
3. Click on ABC Activities and log in.
4. Select the month and week that you are reporting time for.
5. In the Search field of the Group Tasks section, enter the record number.
6. Select the ABC task you want to record your time against.
7. Click on To Timesheet.

   The ABC task is added to your timesheet.
8. Enter the percentage of each day you worked on that task.
9. **Repeat from step 3 for every record you need to report time against.**
10. Click on the Save icon.

Improved Version

1. How to Report Time Spent on a Record
2. Open Internet Explorer
3. Click on ABC Activities and log in.

For each record you need to report time against:

1. Select the month and week that you are reporting time for.
2. In the Search field of the Group Tasks section, enter the record number.
3. Select the ABC task you want to record your time against.
4. Click on To Timesheet.

   The ABC task is added to your timesheet.
5. Enter the percentage of each day you worked on that task.
6. Click on the Save icon.

Appendix B

Top Ten TBA Problems

What Is the Purpose of This Appendix?

This appendix explains the ten most common TBA problems observed in peer reviews, including examples of each one, and provides a writer's checklist for these problems.

Note: The problems appear in no particular order.

Umbrella Topics and Cross References

You can use umbrella H1 and H2 topics with no content of their own to group H2 or H3 topics below them. However, to prevent empty topics (heading only) being displayed in online help, you should include cross-references to all the associated H2 or H3 topics.

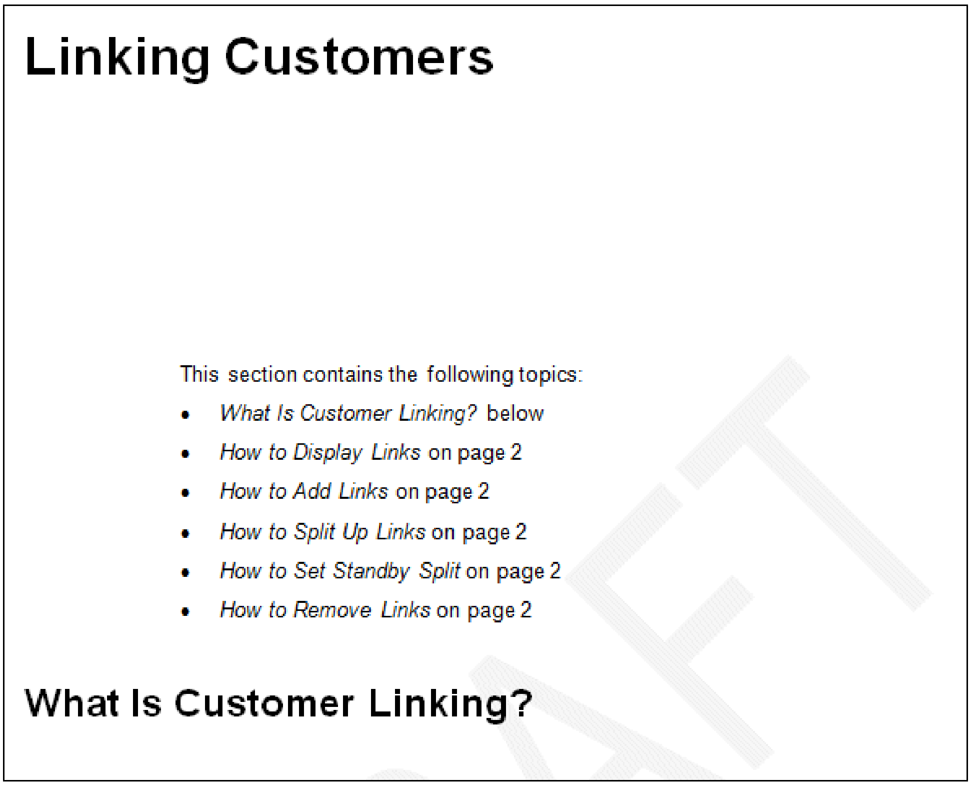
Note: This does not apply when all the sub-topics are H4 topics since these will always appear in online help when their "parent" topic is displayed.

Always include your cross references using an H4 topic called Related Topics, immediately below the empty umbrella topic, with its output type set to Web Only.

Example 1: Cross References Required

Note: In this example, the sub-topics are at H2 level.

Instead of this:



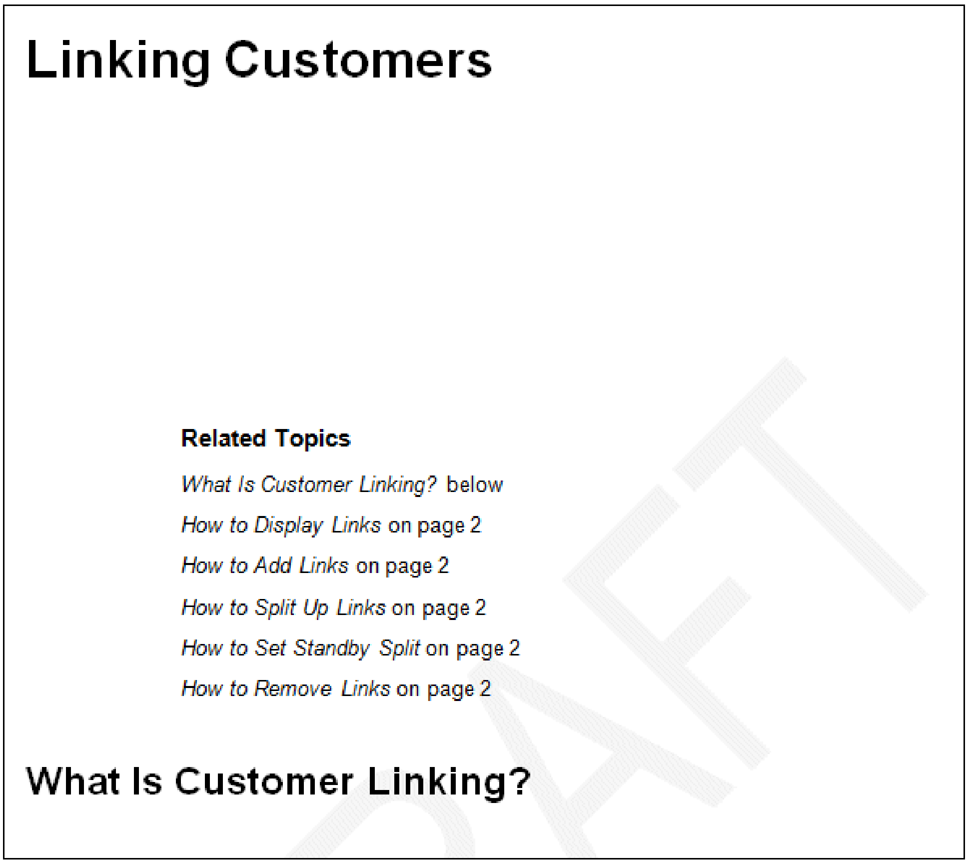
Linking Customers

This section contains the following topics:

- *What Is Customer Linking?* below
- *How to Display Links* on page 2
- *How to Add Links* on page 2
- *How to Split Up Links* on page 2
- *How to Set Standby Split* on page 2
- *How to Remove Links* on page 2

What Is Customer Linking?

Do this:



Linking Customers

Related Topics

What Is Customer Linking? below

How to Display Links on page 2

How to Add Links on page 2

How to Split Up Links on page 2

How to Set Standby Split on page 2

How to Remove Links on page 2

What Is Customer Linking?

Example 2: Cross References Not Required

Note: In this example, the sub-topics are at H4 level.

CO2 Messages Wizard

What Is It For?

The CO2 Messages wizard lets you define the messages associated with the calculation of CO2 emission levels.

What Do You Provide?

Data source message

Use this field to define the message displayed in the CO2 legend on availability pages. The message describes where the emission level data comes from. The default message is:

CO2 emission data is provided by ICAO

You may want to update the message if, for example, your community displays CO2 emission levels for both air and rail, or for rail only.

This message is optional (delete it if you do not want a message to be displayed), maximum 200 characters (plain text only, no HTML, no special characters).

Email message

Use this field to define the message in the confirmation email. The message states the total CO2 emissions for the trip. The default message is:

Total CO2 emissions in kg

followed by the calculated number of kilograms. This message is mandatory, maximum 100 characters (plain text only, no HTML, no special characters).

Topic Titles

Topic titles must be an accurate reflection of the topic content. At the same time, they should also be as concise as possible and not be excessively pedantic or verbose.

Example 1: Title Too Vague

The title of the following topic is not precise enough. The information does not explain how to "work with" different record types; it simply explains the different types available.

Working With Different Types of Records in ACE

Throughout ACE you can display and create the following types of records:

- Database records

  Database records are permanent: they contain the information that is currently loaded in Amadeus.

- Work records

  Work records are temporary: they contain the information you have amended since the last extraction.

- Order management records

  These are created by users in certain markets to order lines and definitions (terminals and printers). Each order record follows a workflow where it is actioned by the appropriate group in Amadeus.

So do the following instead:

What Are the Record Types in ACE?

Record Type	Explanation
Database	Database records are permanent: they contain the information that is currently loaded in Amadeus.
Work	Work records are temporary: they contain the information you have amended since the last extraction.
Order management	These are created by users in certain markets to order lines and definitions (terminals and printers). Each order record follows a workflow where it is actioned by the appropriate group in Amadeus.

Note: By using a table, you also eliminate the need for introductory text after the topic title.

Example 2: Title Too Vague

Instead of this:

Providing Gender

The system prompts you to provide the gender of a customer when gender is:

- mandatory but missing in the CPR
- mandatory but cannot be determined automatically from the customer's title
- required for aircraft weight and balance purposes

Whether or not gender is mandatory is determined by the business rules set up for your airline. Business rules also control whether or not the system is allowed to determine gender automatically.

How to Provide Gender

Do this:

> ## When Is Customer Gender Required?
>
> The system prompts you to provide the gender of a customer when gender is:
>
> - mandatory but missing in the CPR
> - mandatory but cannot be determined automatically from the customer's title
> - required for aircraft weight and balance purposes
>
> Whether or not gender is mandatory is determined by the business rules set up for your airline. Business rules also control whether or not the system is allowed to determine gender automatically.
>
> ## How to Provide Customer Gender

Example 3: Title Too Vague

Instead of this (when the only tasks explained are about how to **issue** vouchers"):

> ## Managing Mass Issuance of Vouchers
>
> ### What Is Voucher Mass Issuance?
>
> For a disrupted journey, you can issue compensation vouchers to more than one customer at a time instead of issuing the vouchers individually.
>
> You can mass issue the following voucher types:
>
> - Catering
> - Hotel
>
> ### How to Mass Issue Vouchers
>
> 1. In the Disruption Handling Summary screen, select the disrupted journey.
> 2. Press Enter.
> 3. In the Disruption Customer List screen, press F8 for Issue Catering or F9 for Hotel.
>
>   The Catering Voucher Mass Issuance or Hotel Voucher Mass Issuance screen appears.
> 4. Select the customers for whom you want to issue vouchers.
> 5. Select the hotel or catering type from the list.
> 6. Press Enter.

Do this:

> **Mass Issuing Vouchers**
>
> **What Is Voucher Mass Issuance?**
>
> For a disrupted journey, you can issue compensation vouchers to more than one customer at a time instead of issuing the vouchers individually.
>
> You can mass issue the following voucher types:
>
> - Catering
> - Hotel
>
> **How to Mass Issue Vouchers**
>
> 1. In the Disruption Handling Summary screen, select the disrupted journey.
> 2. Press Enter.
> 3. In the Disruption Customer List screen, press F8 for Issue Catering or F9 for Hotel.
>
>   The Catering Voucher Mass Issuance or Hotel Voucher Mass Issuance screen appears.
> 4. Select the customers for whom you want to issue vouchers.
> 5. Select the hotel or catering type from the list.
> 6. Press Enter.

Example 4: Title Too Explicit

Instead of this (when there is only one way of "uploading the XM file"):

> **Uploading the XML File Through the AGM Upload Program**

Do this:

> **Uploading the XML File**

Example 5: Title Too Explicit

Instead of these:

> **Why Decoding of the System Response Is Required**

Why Do You Need to Decode the System Response?

Do this:

Why Decode System Responses?

Example 6: Title Too Explicit

Instead of these (when the only user group for the document is "LDD"):

What Types of Win@proach Records Are Handled by LDD?
Which Types of Records in Win@proach Does LDD Handle?

Do this:

Which Win@aproach Record Types Do You Handle?

Note: The audience definition for this document is: **This document is intended for technical writers in the LDD group. It can also be useful for managers and any other LDD members who need to use Win@rpoach records.**

Example 7: Title Too Explicit

Instead of this (when all "High priority messages" **must** be "acknowledged"):

How to Process a High Priority Message That Requires an Acknowledgement

Do this:

How to Process High Priority Messages

Topic Structure

You should always group closely related topics together at the same level and place them under an umbrella topic.

Example 1

Instead of this:

> **Why Accept Cabin Baggage at the Gate?**
>
> If cabin baggage is not allowed to be taken on board due to aircraft size or the high volume of cabin baggage, you can accept the cabin bags at the gate to be put into the hold.
>
> **How to Accept Cabin Baggage at the Gate**
>
> 1. Select the customer if necessary.
> 2. Ensure that the Add Bag screen is displayed.
> 3. In the Additional Hold Baggage field KG, type 0.
> 4. Click on Add Bag.
>   The attribute GATE is added to the bag tag information.
> 5. Print the bag tag.

Do this:

> **Accepting Cabin Baggage at the Gate**
>
> **Why Accept Cabin Baggage at the Gate?**
>
> If cabin baggage is not allowed to be taken on board due to aircraft size or the high volume of cabin baggage, you can accept the cabin bags at the gate to be put into the hold.
>
> **How to Accept Cabin Baggage at the Gate**
>
> 1. Select the customer if necessary.
> 2. Ensure that the Add Bag screen is displayed.
> 3. In the Additional Hold Baggage field KG, type 0.
> 4. Click on Add Bag.
>   The attribute GATE is added to the bag tag information.
> 5. Print the bag tag.

Example 2

In the following example, the topic in blue at H3 level should be at H2 level, since it is not a sub-topic of "What Is the Base Template?". These two topics should be at the same level.

Base Template

What Is the Base Template?

The Base Template contains predefined rule text that you can use to manage the display of Korean text for Topas online fares.

The Base Template allows you to:

- Create an editable copy of the template
- Customise rule text and apply it to all fares under the same rule
- Modify or reorder rule text
- Enter text in Korean or English language

There are 24 rule text elements in the Base Template. You cannot modify the element names.

Working with Base Templates

How to Display a Base Template

1. Open the FareXpert application.
2. Select the **Base Template** module from the list.
3. Enter the name of the Base Template.

   Or:

   Click on **Search** to display all the existing templates and select one.
4. Click on **Open**.

How to Modify a Base Template

Example 3

Instead of this:

Chapter 13

Do this:

Chapter 13

Example 4

Instead of this:

What Is the Total Purchase Price?

The total purchase price is the price the travel agency pays to the service provider.

What Is the Total Sales Price?

The total sales price is the price the traveller pays to the travel agency.

This includes:

- Mark-ups
- Discounts
- Taxes

Do this:

What Are the Total Purchase and Total Sales Prices?

Total Purchase Price

The price the travel agency pays to the service provider.

Total Sales Price

The price the traveller pays to the travel agency.

This includes:

- Mark-ups
- Discounts
- Taxes

Repetition

Don't repeat information within a topic or document/online help. Also, don't provide the same information in different ways.

Example 1

In the following topic, the information in blue is repeated.

How to Search for a Fare

1. Select the one way, round trip or multi-destination search mode.
2. Enter the travel itinerary.

   Mandatory fields are highlighted in yellow.
3. In the **Global Flight Search Options** section, select what you want to display in the search results.
4. Choose the types of fares to include in the search.
   - To search for Amadeus fare types only, select the required options in the **Amadeus Fare Types** section and ensure that you clear all of the option in the **Website Fare Types** section.
   - To search for website fares types only, select the required options in the **Website Fare Types** section and ensure that you clear all options in the **Amadeus Fare Types** section.

   Note: Mandatory options are highlighted in yellow.
5. To define additional search options, click on **More Search Options** and make your selections.
6. If Service Fee Manager (SFM) is activated in your office profile and you want to include agency ticketing fees in the search results, select **Price Scheme Reference (PSR)**.
7. Click on Search.

Instead, provide the information once, in the appropriate place in the document or help, like this:

Mandatory and Optional Fields

In every screen:

- Mandatory fields are highlighted in yellow. You cannot proceed until you have completed these fields.
- All other fields are optional.

Example 2

In the following example, the text in blue is explaining the same thing but in two slightly different ways. The text in red is exactly the same information but in two different places.

How to Update a Solution

1. Search for the solution you want to update.
2. In the search results, click on the title of the solution.
3. Update the solution as required.
4. If you uploaded a new version of a document, update the month and year in the solution title with the publication month and year of the document.
5. Click on **Close** or **Save & Close**.

   Caution: If you navigate away from the solution without clicking on **Close** or **Save & Close**, the solution will still be available to the specified audiences but it will only be editable by the owner. The solution must be editable by all users with administration rights.

How to Replace a File in a Solution

1. Search for the solution in which you want to replace a file.
2. Click on the solution title to access the solution.
3. In the **Files** section, click on the file you want to replace.
4. Click on **Browse** to find the new file.
5. Select the new file.
6. Click on **Close** or **Save & Close**.

   Caution: If you navigate away from the solution without clicking on **Close** or **Save & Close**, the solution will still be available to the specified audiences but it will only be editable by the owner. The solution must be editable by all users with administration rights.

So instead, do this:

How to Update a Solution

1. Search for the solution you want to update.
2. In the search results, click on the title of the solution.
3. Update the solution as required.
4. If you uploaded a new version of a document, update the month and year in the solution title with the publication month and year of the document.
5. Click on **Close** or **Save & Close**.

   Note: For important information about saving and closing, see *Saving and Closing* below.

How to Replace a File in a Solution

1. In the **Files** section, click on the file you want to replace.
2. Click on **Browse** to find the new file.
3. Select the new file.
4. Click on **Close** or **Save & Close**.

   Note: For important information about saving and closing, see *Saving and Closing* below.

Saving and Closing

If you navigate away from the solution without clicking on **Close** or **Save & Close**, the solution will still be available to the specified audiences but it will only be editable by the owner. The solution must be editable by all users with administration rights.

Example 3

Both of the following topics appear in the same document. The first is in the main part of the document and the second is in an appendix. Therefore, the "Type of Booking Code field" is explained differently in two different places. (The relevant text in the second topic is in blue.)

Using the Type of Booking Code Field

The entry in the **Type of Booking Code** field indicates whether there is a choice of booking codes.

Type of Booking Code Field
Permitted
• A choice of booking codes that apply only to exceptions. The exception is either the first of intermediate in the list. • A choice of booking codes that apply to exceptions and normal booking codes.
Required
• A choice of booking codes that apply only to exceptions. The exception is last in the list. • No choice of booking code. This exception is mandatory.

Explanation: Booking Code Exceptions Table

Field	Description	Format
Carrier Code	Unique carrier code to which the booking exception applies.	Two alphanumeric characters. Alternatively, click on ... and select from the Encode drop-down list. To apply the booking code exception to all carriers, leave the field blank.
Type of Booking Code	Indicates if there is a choice of booking codes.	Select either of the following: • Permitted • Required (Default)
Booking Code	Letter code used to reserve a passenger seat.	One or two alphabetic characters.
Transporting Class	Class of travel.	One alphabetic character.

Instead, the explanation of the "Type of Booking Code field" should be consolidated in a single place, with cross references to it in other places, if required.

Example 4

In the following topic, the text is blue is unnecessary since it is repeating the information provided in the bullet points, with no added value.

How Are Agent Ticketing Fees Managed?

The Price Scheme References (PSRs) that are created in Service Fee Manager (SFM) determine the agent ticketing fees for a fare in All Fares Plus.

When SFM is activated at office profile level, agent ticketing fees are included in the search results of All Fares Plus, if the PSR option is selected for the search.

When you book a fare with agent ticketing fees, the Confirmation page displays two options: you can either display the fees in SFM or validate the fees.

- If you choose to display the fees, the SFM tab opens showing a summary of the fees.
- If you choose to validate the fees immediately, all fees per passenger are validated and receive confirmation.

Example 5

Both of the following topics appear in the same document.

What Does the Colour of the Message Text Mean?

The message priority and read or unread status are indicated by the colour of the message text.

Message Type	Message Text
Very High priority messages	Red text
High priority messages	Amber text
Low and Medium priority messages	Black text
Unread messages	Bold text
Read messages	Normal text

Note: Low priority messages are not displayed in the **Message** panel.

What Are the Message Priorities?

The priority of a message determines how it is displayed to you when you receive it. The following table explains the different message priorities.

Table: Message Priorities

Priority	Explanation
Very High	Displayed in your list of messages with red text. Very High priority messages are displayed automatically, as soon as they are received. These messages require a response.
High	Displayed in your list of messages with amber text. High priority messages are displayed automatically when you navigate to the relevant screen or flight leg. These messages require an acknowledgement.
Medium and Low	Displayed in your list of messages with black text. To read these messages, you must open them manually.

In the second topic:

- The text in blue is unnecessary since it simply repeats the title of the table that follows it.
- The text in red repeats information found in the first topic.

So instead, remove the redundant information and add a cross reference, like this:

What Are the Message Priorities?

The priority of a message determines how it is displayed to you when you receive it.

Table: Message Priorities

Priority	Explanation
Very High	Displayed automatically, as soon as they are received. These messages require a response.
High	Displayed automatically when you navigate to the relevant screen or flight leg. These messages require an acknowledgement.
Medium and Low	Displayed in your list of messages with black text. To read these messages, you must open them manually.

Messages are displayed in different colours according to their priority. For more information, see *What Does the Colour of the Message Text Mean?* on page 1.

Example 6

In the following topic, the text in blue is providing the same information in two different ways.

Also:

- Different terms (shown in red) are used for the same thing.

  Note: For more information and examples, see *Consistent Terminology* on page 53.

- The text in green is describing what happens on the screen rather than telling the user what to do.

How to Sign In to Inventory Mask

1. Launch the Amadeus Retailing Platform.
2. Enter the login credentials that have been provided to you.

Table: Login Credentials

Field	Explanation
Login	Your username.
Organisation	Your airline code (2-5 characters).
Password	The password assigned to you.
Office ID	The unique identifier of the authorised Amadeus office.
Duty Code	The authorisation level used to assign your access rights when you sign in.
Authentication Code	The unique verification code. You must select Hosted, which is selected by default. You should not modify this field.

3. Click on Sign In.

   When you sign in for the first time, you are prompted to modify your password.

So instead, do this:

How to Sign In to Inventory Mask

1. Launch the Amadeus Retailing Platform.
2. Enter your sign-in credentials.

Table: Sign-in Credentials

Field	Explanation
Login	Your username.
Organisation	Your airline code.
Password	Your password.
Office ID	The unique identifier of your authorised Amadeus office.
Duty Code	Your authorisation level. This determines your access rights when you sign in.
Authentication Code	Your verification code. You must select Hosted.

3. Click on Sign In.
4. If you are signing in for the first time, modify your password when prompted.

Describing Error Messages

Don't describe error messages unless you are also telling the user how to handle the message or what to do when it appears. Simply stating that "an error message appears" is of no use; the user will see the message when using the product and, hopefully, the message itself will explain what went wrong or what the user should do next.

In any case, you should always focus in general on explaining how to **prevent** error messages.

Example 1

Instead of this:

> 1. Select the **Credit Note for Invoice** option.
>
>   When you select this option for a product that has not been paid, the following message appears:
>
>   **Invoice only allowed when products are paid**

Do this:

> 1. Select the **Credit Note for Invoice** option. You can use this option only for products that have been invoiced.

Example 2

In the following topic, the text shown in blue describes an error message and its cause instead of helping the user to prevent it.

How to Find Onward Connections and Merge Bookings

1. Ensure that the relevant customer is identified, selected and shown in the CP table on the **Customer Acceptance** or **Customer Display** screen.
2. Press F9 to select **Find Connection**.

   The system searches for customer records with the same name and a flight departing from the destination city within 24 hours.

   The **Find Connection** screen appears. The matching customer records are displayed in the bottom half of the screen.
3. In the first **Select Customer(s)** field, type the line number of the customer record you want to update.
4. In the second **Select Customer(s)** field, type the line number of the customer record you want to merge with the one you selected in the previous step.
5. Press **Enter** to select **Add Connection**.

   Note: If both customer records contain date-of-birth information and there is a mismatch between them, you cannot merge the records and an error message appears.
6. If you are prompted to confirm that the customer records belong to the same customer, select **Yes** and press **Enter**.

   You are only prompted to confirm the merge if an exact match does not exist between the customer names and titles in the two customer records.
7. Proceed with customer acceptance.

   Note: The indicator **MRG** now appears in the CP table next to the customer's name.

So instead, do this:

How to Find Onward Connections and Merge Bookings

1. Ensure that the relevant customer is identified, selected and shown in the CP table on the **Customer Acceptance** or **Customer Display** screen.
2. Press F9 to select **Find Connection**.

   The system searches for customer records with the same name and a flight departing from the destination city within 24 hours.

   The **Find Connection** screen appears. The matching customer records are displayed in the bottom half of the screen.
3. In the first **Select Customer(s)** field, type the line number of the customer record you want to update.
4. In the second **Select Customer(s)** field, type the line number of the customer record you want to merge with the one you selected in the previous step.

   Note: If both customer records contain date-of-birth information, it must match.
5. Press **Enter** to select **Add Connection**.
6. If you are prompted to confirm that the customer records belong to the same customer, select **Yes** and press **Enter**.

   You are only prompted to confirm the merge if an exact match does not exist between the customer names and titles in the two customer records.
7. Proceed with customer acceptance.

   Note: The indicator **MRG** now appears in the CP table next to the customer's name.

Example 3

In the following topic, the text shown in blue describes an error message and its cause but the information should appear much earlier and more effectively in the task in order to be of any use.

How to Apply Seat Shuffle to Customers

1. Ensure that the relevant customers are identified and shown in the CP table on one of the following screens:
   - **Customer Acceptance**
   - **Customer Display**
   - **Customer List**
2. Select the customers for seat shuffle.
3. Press **Shift+F11**.

   The **Seating** menu opens.
4. Press **Shift+F3**.

   The **Seat Shuffle** screen opens.
5. In the **Seat Shuffle** field, select the appropriate option:
   - **Turn On**
   - **Turn Off**
   - **Refresh**
6. Press **Enter** to select **Seat Shuffle**.

   Your original screen is re-displayed.

   The message area now includes a message indicating the new seat shuffle status (**On** or **Off**). If you refreshed seat shuffle, the message indicates whether or not there were any seat changes.

   Note: If you exceeded the maximum number of customers allowed for seat shuffle by your airline's business rules, an error message appears.

So instead, do this:

How to Apply Seat Shuffle to Customers

1. Ensure that the relevant customers are identified and shown in the CP table on one of the following screens:
   - **Customer Acceptance**
   - **Customer Display**
   - **Customer List**
2. Select the customers for seat shuffle.

   Note: Depending on your airline's business rules, there may be a limit to the number of customers you can select for seat shuffle at the same time.
3. Press **Shift+F11**.

   The **Seating** menu opens.
4. Press **Shift+F3**.

   The **Seat Shuffle** screen opens.
5. In the **Seat Shuffle** field, select the appropriate option:
   - **Turn On**
   - **Turn Off**
   - **Refresh**
6. Press **Enter** to select **Seat Shuffle**.

   Your original screen is re-displayed.

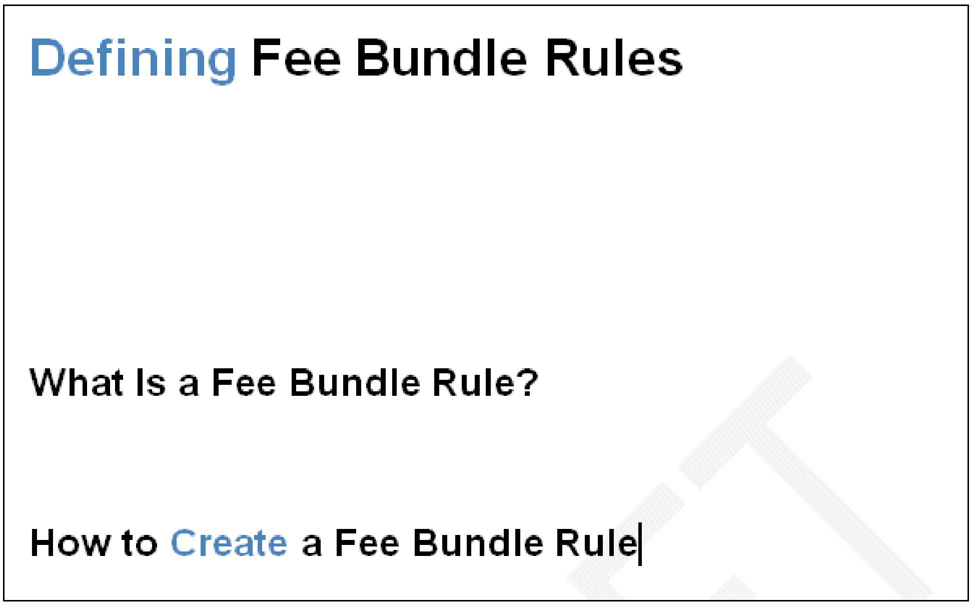
   The message area now includes a message indicating the new seat shuffle status (**On** or **Off**). If you refreshed seat shuffle, the message indicates whether or not there were any seat changes.

Consistent Terminology

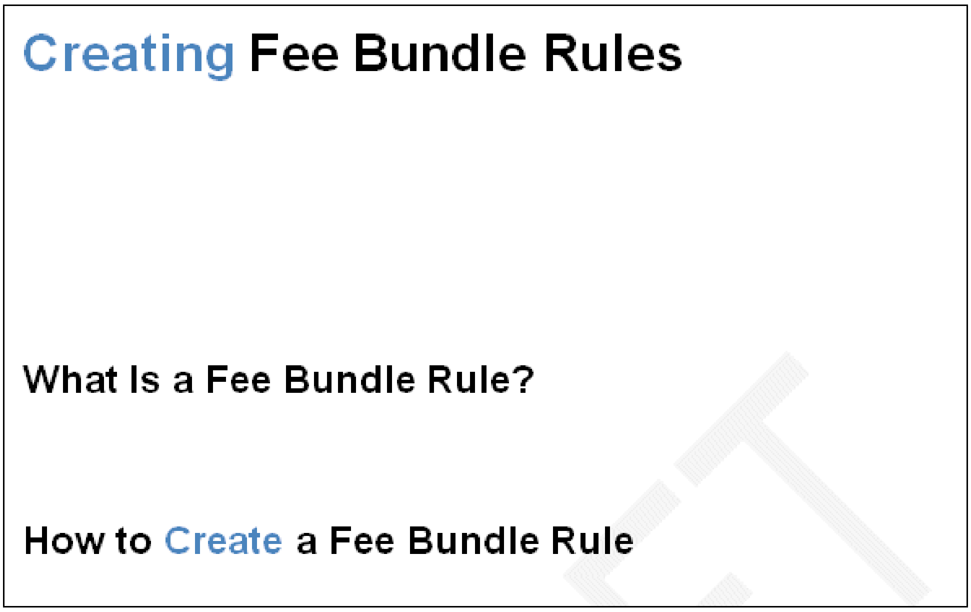
Don't use different terms when referring to the same thing or action, unless you have a specific reason for doing so. Make sure your terminology is as consistent as possible, within each topic and throughout the entire document or online help.

Example 1

Instead of this:



Do this:



Example 2

In the following topic, the terms in blue are different but refer to the same thing.

How to Force Accept a Staff Customer in a Jump Seat

1. On the Seatmap, select the jump seat and make note of the seat number, for example JP-JR1.
2. On the Onload Recommendation screen, select the staff passenger.
3. Press Force Accept.
4. On the Customer Acceptance screen, enter the jump seat number in the Seat Preference field.
5. Press Accept.

Example 3

In the following topic, the terms used to explain the task (in blue) are different from the terms used in the product (in red):

How to Switch Self Boarding On or Off

1. Display the **Boarding** screen.
2. Press SF8 or select **Boarding** from the action list.
3. To switch Self Boarding on, press SF9 or select **Activate Self Boarding** from the action list.
4. To switch Self Boarding off, press SF10 or select **De-Activate Self Boarding** from the action list.

Instead, do this:

How to Activate or De-activate Self Boarding

1. Display the **Boarding** screen.
2. Press SF8 or select **Boarding** from the action list.
3. To activate Self Boarding, press SF9 or select **Activate Self Boarding** from the action list.
4. To de-activate Self Boarding, press SF10 or select **De-Activate Self Boarding** from the action list.

Example 4

In the following example, some topic titles use different terms (shown in blue and red) for the same things.

Finding Flights Using Low Fare Search

What Is Low Fare Search?

Searching for Fares

How to Search for a Fare

How to Display Specific Fare Types Only

How to View Fare Conditions

Instead, do this:

Using Low Fare Search

What Is Low Fare Search?

Searching for Fares

How to Search for Fares

How to View Specific Fare Types Only

How to View Fare Conditions

Workflows/System Flows/Process Flows

Titles

Use the most accurate term for topics that explain workflows, system flows and processes.

- A workflow explains actions performed by the user.
- A system flow explains actions performed by the system.
- A process can include both user and system actions.

Example: Workflow

The following workflow includes system actions (in blue) that should not be included in a workflow.

1. Create a customer statistic to allow the extraction of invoices for a list of customers.
2. Launch the extraction.
3. The extraction program reads the invoices to be exported and creates dedicated ASCII files.

Example: System Flow

The following system flow includes user actions (in blue) that should not be included in a system flow.

System Flow: Registering Automatic APS Payments in the Cash Box

1. When the automatic invoicing process is started, Agency Manager creates a list of products to be paid, groups these by customer/credit card combination and saves these as pending payments.
2. Agency Manager sends an authorization or billing request to the APS server.
3. When Agency Manager receives the response from APS, the following outcomes are possible:
   - When the authorization or billing request is approved, the pending payments are stored in the cash box.
   - When a connection time-out occurs, the pending payments remain and an invoice error is generated. You need to complete or remove the pending payments first before you can finish then invoicing process.
   - When the authorization or billing request is rejected by APS, the pending payments are removed from Agency Manager and an invoice error is generated.

Format

Use tables or graphics (flow charts) for workflows, system flows and processes, whenever possible. A table or graphic is easier to read and avoids the repetitive cross references required if you use a bulleted list.

Example 1

Instead of this:

Workflow: Finding Properties and Availability

1. Find properties and available rooms and rates.

   For more information, see *How to Find Properties and Availability* below.
2. Filter the list, if required.

   For more information, see *Modifying Lists* on page 2.
3. Display property details, if required.

   For more information, see *How to Display Property Details* on page 2.
4. Display pricing details.

   For more information, see *How to Display Room and Rate Details* on page 2.

Do this:

Workflow: Finding Properties and Availability

Step	Action	For More Information
1	Find properties and available room rates.	*How to Find Properties and Availability* below
2	Filter the list, if required.	*Modifying Lists* on page 2
3	Display property details, if required.	*How to Display Property Details* on page 2
4	Display pricing details.	*How to Display Room and Rate Details* on page 2

Example 2

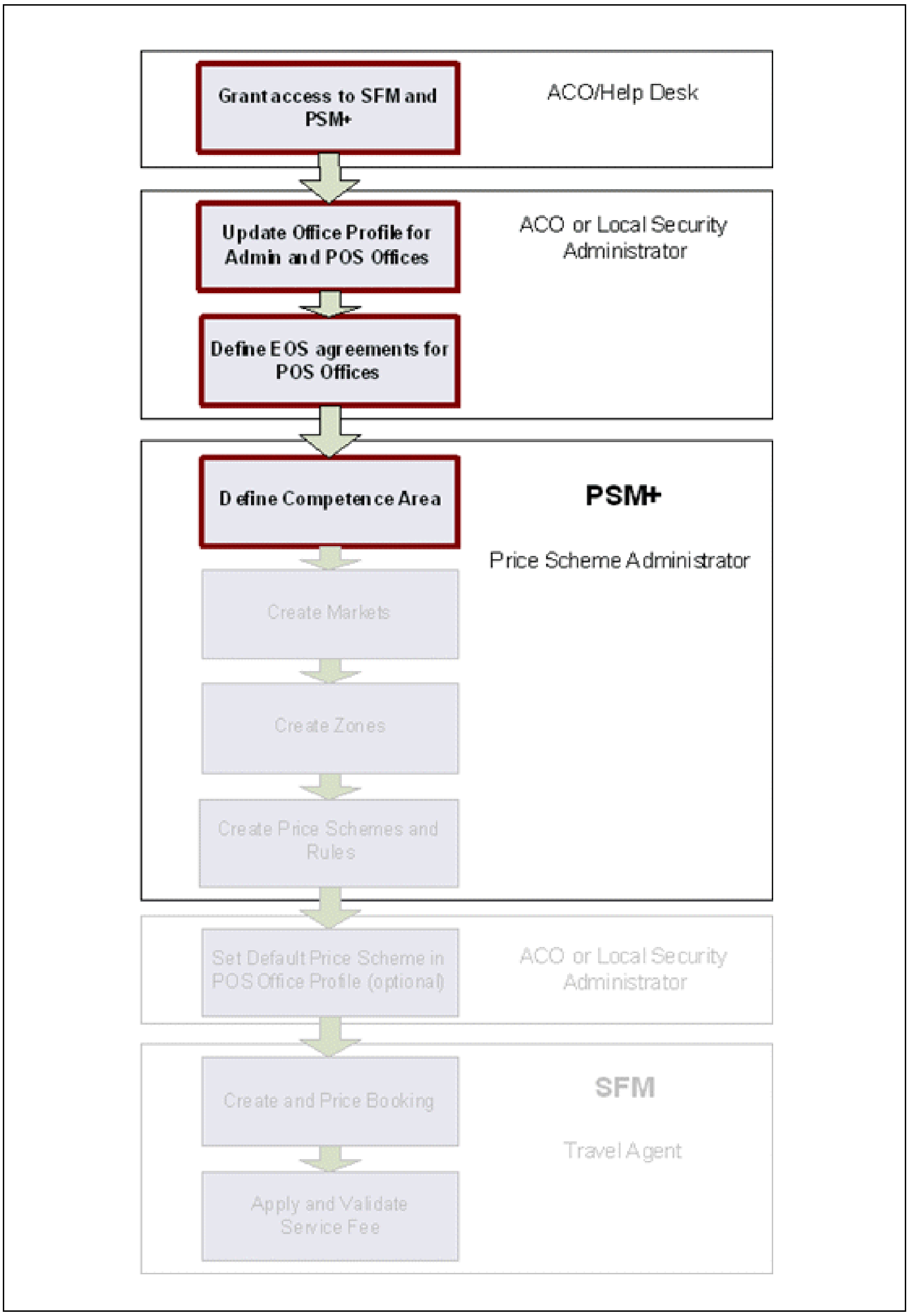
Here is another good example of a workflow using a table rather than a numbered list:

Workflow: Setting Up a Partnership

Step	Done By	Task
1	Delegating organisation	Create the partnership. See *How to Create a Partnership* below.
2	Receiving organisation	Accept the partnership. See *How to Accept a Partnership* on page 82.
3	Partnership type **D**: Delegating organisation	Assign the auto-generated ACLs to the security administrator in your organisation. See *How to Assign the Auto-generated ACLs and Generic Roles for Partnership Management (Delegating* Organisation) on page 79.
	Partnership types **R** and **S**: Receiving organisation	Assign the auto-generated ACLs to the security administrator in your organisation. See *How to Assign the Auto-generated ACLs and Generic Roles for Partnership Management (Receiving Organisation)* on page 83.
4	Delegating organisation	Delegate the relevant roles and ACLs to the receiving organisation. **Note:** The roles and ACLs must have already been created in the normal way. See *How to Delegate Roles and ACLs to the Receiving Organisation* on page 80.
5	Partnership type **D**: Delegating organisation	Assign the delegated roles and ACLs to the consumers in the receiving organisation. See *How to Assign Delegated ACLs and Related Roles (Delegating Organisation)* on page 81.
	Partnership types **R** and **S**: Receiving organisation	Assign the delegated roles and ACLs to the consumers in your organisation. See *How to Assign Delegated ACLs and Related Roles to Consumers (Receiving Organisation)* on page 84.

Example 3

The following topic makes good use of a graphical format. In this case, the process flow consists of a series of actions performed by different users.



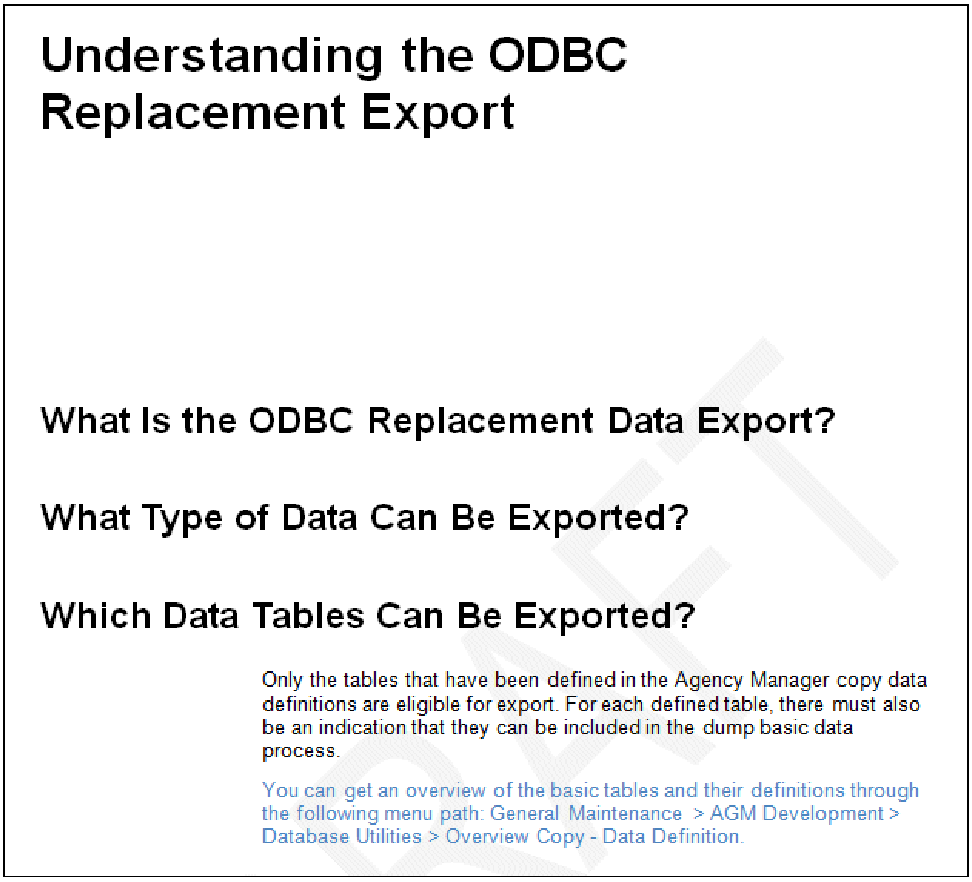
Note: This topic appears multiple times in the document but each time it visually indicates the current stage in the process.

Overviews

Make sure that "overview" topics are truly overviews or high-level conceptual explanations that do not provide detailed information about how to use the product, especially if the detailed information is available elsewhere in the document or online help.

Example 1

In the following example, the information in blue is too detailed and functional for an overview or conceptual topic.



Example 2

In the following example, the information in blue is too detailed and functional for an overview or conceptual topic.

What Is the Export to Coda?

The export to CODA refers to the process of extracting mid office data from Agency Manager and exporting the data to the CODA accounting system. The CODA export file created is a CSV file that is sorted by invoice company. The file contains all the issued tickets and linked fees for a given period.

The export to CODA process involves the creation of two types of export file:

- the pre-CODA export file.
- the final CODA export file.

The pre-CODA export file is the preliminary file that is created. This file is sent to the approving manager, who checks and verifies the information. The approving manager makes the required adjustments to the file and then uploads it to Agency Manager.

After the information from the uploaded file has been synchronised with the mid office data in Agency Manager, the final CODA export file can be created. At the same time the final CODA export file is created, the invoice documents for each invoice company are generated.

All requirements related to setup are located on the CODA Setup (ace3800) screen. This screen is accessed as follows: Mid Office > CODA > CODA Setup. See *Setting Up the Export to CODA* on page 5.

All requirements related to the CODA export file functionality are located on the CODA Runs (ace3801i) screen. This screen is accessed as follows: Mid Office > CODA > CODA Runs. See *Exporting Data to CODA* on page 15.

Example 3

In the following example, the sub-topics in blue are too detailed and functional for an overview or conceptual topic.

Overview of FirstCard Credit Card Extraction in Q-Format

What Is the FirstCard Credit Card Extraction in Q-Format?

The First Card credit card extraction in Q-format is an XML file that can be used to provide credit card information to FirstCard and all Nordic travel agencies.

The extraction in Q-format holds more information and has a more flexible structure compared to the FirstCard credit card extraction in P-format, which is a TXT file.

What Is the Basic Structure of the Extraction in Q-Format?

The extracted XML file consists of the following sectors:

- One header record containing information about the travel agency.
- One batch record for each travel agency.

  The batch record contains:

  - A number of invoices per travel agency.
  - A summary per travel agency.
- One general summary record.

Note: Fields in the records that are not applicable to Agency Manager are not included in the extraction.

What Is the Naming Convention of the Extraction in Q-Format?

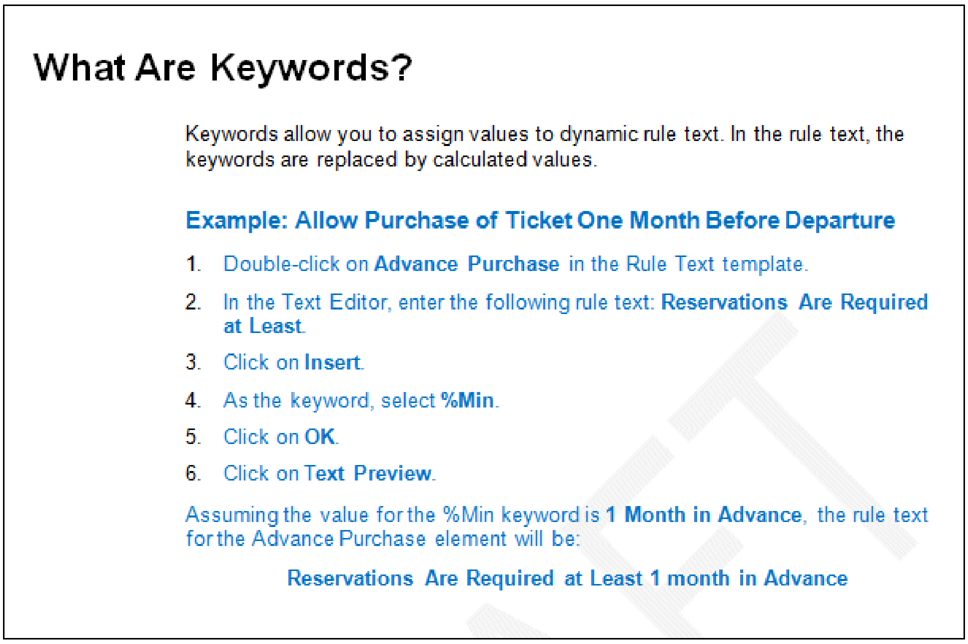
The name of the FirstCard credit card extraction in Q-format consists of the following elements:

- The converted company code.

  This is the company code defined in conversion field CY.

Example 4

In the following example, the sub-topic is blue is too detailed for the conceptual topic it supports because it explains "how to use a keyword". It belongs in a topic such as "Using Keywords" or "How to Use Keywords".



What Are Keywords?

Keywords allow you to assign values to dynamic rule text. In the rule text, the keywords are replaced by calculated values.

Example: Allow Purchase of Ticket One Month Before Departure

1. Double-click on **Advance Purchase** in the Rule Text template.
2. In the Text Editor, enter the following rule text: **Reservations Are Required at Least**.
3. Click on **Insert**.
4. As the keyword, select **%Min**.
5. Click on **OK**.
6. Click on **Text Preview**.

Assuming the value for the %Min keyword is **1 Month in Advance**, the rule text for the Advance Purchase element will be:

Reservations Are Required at Least 1 month in Advance

Example 5

In the following example, the text in blue is more appropriate and useful in the task, where the user actually selects the "location type".

What Is Market Management?

You user Market Management to define markets based on flight origins and destinations. You can then apply business rules to markets. You could define a rule and apply it to all flights between FR (France) and LON (London), for example.

A market can consist of the following types of locations:

- Airport
- City
- State
- Country
- Region
- World

How to Create a Market

1. Click on **Create Market**.
2. In the **General Information** area, complete the following fields:

Field	Explanation
Organisation	Enter your airline code.
Application	Select Availability (AVL).
Sub-Application	Select Booking Code Adjustment (BCA)

3. In the **Content** area, enter a name for the market you want to create and a text description.
4. In the **Add Content** area, select the location type and location code that applies to the market.
5. Click on **Add**.

   The content is saved to the **Active Content** box.

So instead, do this:

What Is Market Management?

You user Market Management to define markets based on flight origins and destinations. You can then apply business rules to markets. You could define a rule and apply it to all flights between FR (France) and LON (London), for example.

How to Create a Market

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Organisation	Enter your airline code.
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3. In the **Content** area, enter a name for the market you want to create and a text description.
4. In the **Add Content** area, select the location type and location code that applies to the market.

   A market can consist of the following types of locations:

   - Airport
   - City
   - State
   - Country
   - Region
   - World
5. Click on **Add**.

   The content is saved to the **Active Content** box.

Note: This example assumes that there is a purpose in listing the "location types". If they are clearly displayed in the interface, there is probably no reason to list them in the explanation, without providing additional information about them.

Summary or Introductory Content

Avoid adding summary or introductory information in H1, H2 and H3 umbrella topics.

Never include information that simply repeats the title or expresses it a slightly different way.

If you really need to include summary or introductory information in an H1, H2 or H3 topic, make it a separate topic at a lower level, with an appropriate title.

Example 1

Instead of this:

End User Maintenance Process

End User Maintenance (EUM) is a process designed to allow National Systems (NS), National Distribution Systems (NDS), local ACOs and Altéa Reservation airlines to create and update their office, terminal, and printer definitions in Amadeus using a secure, controlled environment.

Each local ACO and airline is responsible for providing the EUM requirements for its own market. There are several different procedures for sending EUM data to Amadeus. How this information is loaded in the distribution system depends on the market.

The Order Management & Security group (ORM) is responsible for the process in Amadeus. This includes creating and maintaining the logical definitions of offices, terminals, printers and terminal and printer cross-references in the distribution system. For information about the ORM group, see GGASKHELPDESK.

The process can be summarised in the following steps:

1. **Data entry/request:** Local ACOs, Altéa Reservation airlines, National Systems (NS) and National Distribution Systems (NDS) request their office, terminal, and printer definitions from the DB2 database in the form of Work Records. Some markets send the data to be added by ICD50 file transfer.
2. **Data extraction:** Data is extracted from the DB2 database in the form of data files.
3. **Data load and TPF update:** The Order Management & Security group uses the EUM server to load the extracted work records into the Amadeus TPF production system.
4. **Nightly synchronisation:** The DB2 database is refreshed nightly with a copy of the contents of the TPF production system.
5. **Daily export to Web Config:** After synchronisation the data is exported to Web Config.

Data Entry and Request

Data Extraction

Do this:

End User Maintenance Process

Overview of EUM

End User Maintenance (EUM) is a process designed to allow National Systems (NS), National Distribution Systems (NDS), local ACOs and Altéa Reservation airlines to create and update their office, terminal, and printer definitions in Amadeus using a secure, controlled environment.

Each local ACO and airline is responsible for providing the EUM requirements for its own market. There are several different procedures for sending EUM data to Amadeus. How this information is loaded in the distribution system depends on the market.

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Process Summary: EUM

1. **Data entry/request:** Local ACOs, Altéa Reservation airlines, National Systems (NS) and National Distribution Systems (NDS) request their office, terminal, and printer definitions from the DB2 database in the form of Work Records. Some markets send the data to be added by ICD50 file transfer.
2. **Data extraction:** Data is extracted from the DB2 database in the form of data files.
3. **Data load and TPF update:** The Order Management & Security group uses the EUM server to load the extracted work records into the Amadeus TPF production system.
4. **Nightly synchronisation:** The DB2 database is refreshed nightly with a copy of the contents of the TPF production system.
5. **Daily export to Web Config:** After synchronisation the data is exported to Web Config.

Data Entry and Request

Data Extraction

Example 2

In the following topic, the text in blue is unnecessary and should be removed.

Creating or Modifying Standalone Rate Plans

This section explains how to work with standalone rate plans. You can create or modify them.

What Are Standalone Rate Plans?

How to Create or Modify a Standalone Rate Plan

If the topic is used in online help, do this instead:

Creating or Modifying Standalone Rate Plans

Related Topics

- *What Are Standalone Rate Plans?* below
- *How to Create or Modify a Standalone Rate Plan* below

What Are Standalone Rate Plans?

How to Create or Modify a Standalone Rate Plan

Example 3

In the following example:

- The text in blue provides a vague introduction under an umbrella heading.
- Some of the information in blue is available more accurately in a sub-topic (shown in red).

Sending Messages

Load Control Supervisors, Load Controllers and Ramp Agents can send messages to each other using the Flight Management messaging system.

A dedicated message panel is provided to allow you to create and send new messages as required.

How to Send a Message

1. In the **Message Panel**, click on **Publish**.
2. In the **Publish Message** field of the **Message** dialog box, enter the text of your message.
3. From the **To** list, select the recipients for your message.
4. For each recipient, complete the required fields, which are highlighted.
5. Select the priority of the message.
6. Click on **Publish**.

Who Can You Send Messages To?

Messages are sent to users who are allocated to the flights for which you enter details.

However, your own roles and permissions also determine the list of recipients available to you.

- Load Controllers and Ramp Agents can send messages to other Flight Management users who are assigned to the flight number you specify.
- Load Control Supervisors can also send messages to all Flight Management users who:
  - Handle a specific flight.
  - Belong to a specific domain.
  - Work at a specific port.

The introductory text could be shorter, more focused and presented as a short topic of its own, with an appropriate title. Like this:

Sending Messages

What Is the Message Panel?

The Message Panel allows Load Control Supervisors, Load Controllers and Ramp Agents to send messages to each other in Flight Management.

How to Send a Message

1. In the **Message Panel**, click on **Publish**.
2. In the **Publish Message** field of the **Message** dialog box, enter the text of your message.
3. From the **To** list, select the recipients for your message.
4. For each recipient, complete the required fields, which are highlighted.
5. Select the priority of the message.
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Who Can You Send Messages To?

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- Load Control Supervisors can also send messages to all Flight Management users who:
  - Handle a specific flight.
  - Belong to a specific domain.
  - Work at a specific port.

Note: If you consider the definition of a "message panel" as obvious to the user, the entire topic ("What Is the Message Panel?") is unnecessary.

Screen Captures

Make sure that your screen captures are in the correct position in relation to the surrounding text.

Example 1

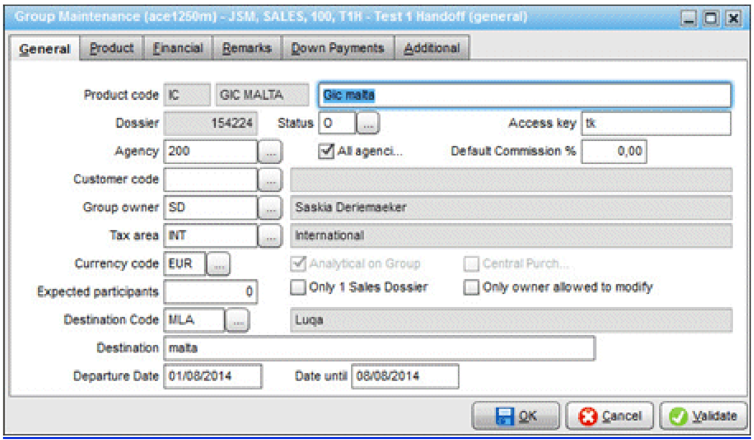
In the following topic, the screen capture illustrates Step 3, after the fields have been completed, but it appears in Step 2.

1. In the Menu tab, select Mid Office > Dossiers > Incentives and Groups.

   The Incentives and Groups (ace1250i) screen opens.

2. Click on the **Insert** icon to create a new group.

   The Group Maintenance (ace1250m) screen opens.



3. In the **General** tab, define or change the fields.

Here is the same topic with the screen in its correct position:

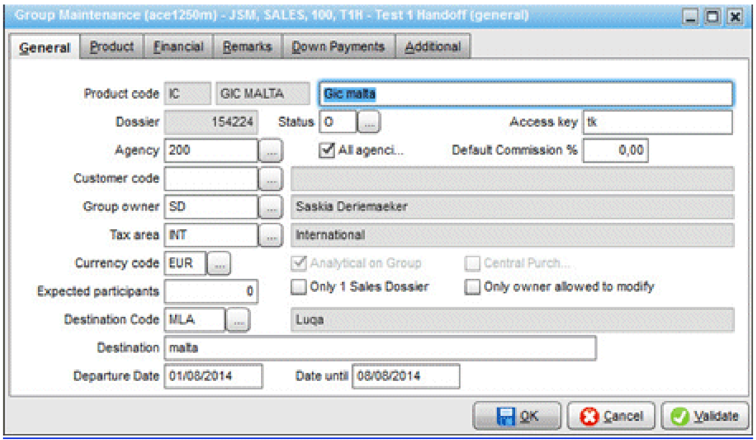
1. In the Menu tab, select Mid Office > Dossiers > Incentives and Groups.

   The Incentives and Groups (ace1250i) screen opens.

2. Click on the **Insert** icon to create a new group.

   The Group Maintenance (ace1250m) screen opens.

3. In the **General** tab, define or change the fields.



Example 2

In the following topic, the screen capture illustrates step 3 but shows the screen as it appears **before** the update (the text in blue).

How to Cancel ETRs in Cryptic Mode

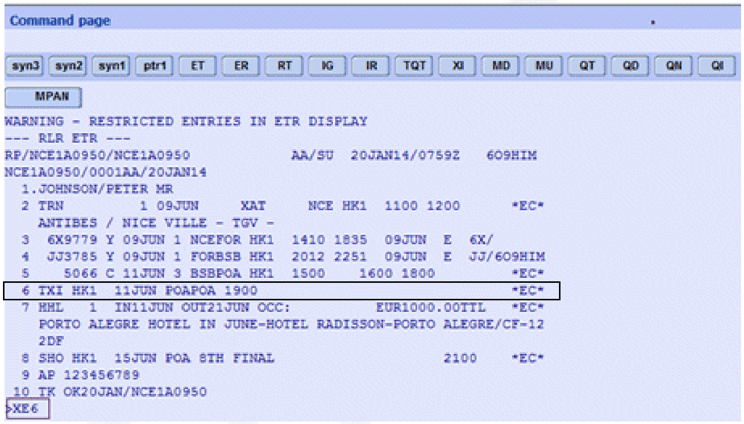
1. In Selling Platform, click on the **Cryptic** tab.
2. Display the ETR by entering the following:

   EPD/ETR

3. Delete specific ETRs by entering **XE** followed by the line number of the ETR. For example:

   XE6

   The corresponding ETR is removed from the PNR.



So instead, do this:

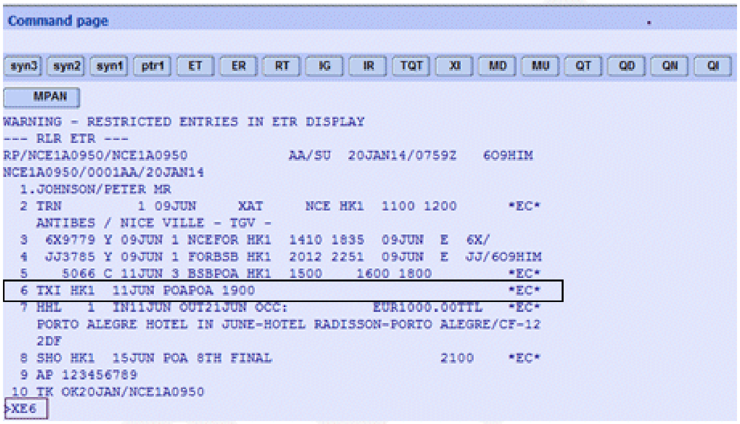
How to Cancel ETRs in Cryptic Mode

1. In Selling Platform, click on the **Cryptic** tab.
2. Display the ETR by entering the following:

   EPD/ETR

3. Delete specific ETRs by entering **XE** followed by the line number of the ETR. For example:

   XE6



The corresponding ETR is removed from the PNR.

Checklist: Top Ten TBA Problems

Checked?	What to Check	For More Information
	For empty H1 or H2 umbrella topics, have you included cross references to topics below them?	*Umbrella Topics and Cross References* on page 33
	Are you topic titles accurate without being too wordy?	*Topic Titles* on page 35
	Have you avoided describing error messages, unless you are explaining what to do about them?	*Describing Error Messages* on page 50
	Is your terminology consistent throughout the document or online help?	*Consistent Terminology* on page 53
	Are your system flows/workflows/processes accurately titled and presented in the most effective format?	*Workflows/System Flows/Process Flows* on page 56
	Are your overview or summary topics truly overviews or summaries?	*Overviews* on page 60
	Have you avoided introductory text in your H1 and H2 topics?	*Summary or Introductory Content* on page 66
	Are closely related topics grouped together at the same level?	*Topic Structure* on page 40
	Have you made sure that the same information does not appear more than once?	*Repetition* on page 43
	Are your screen captures positioned correctly?	*Screen Captures* on page 71