

## Work Plan for RLINK PM User Guide Indexing

### Guidelines

1. Expand the existing index to include references to:
  - a. Main topics in paragraphs
  - b. Table names
  - c. Field names, if used for screen input
  - d. Definitions of terms
  - e. Acronyms or abbreviations
  - f. Synonyms
  - g. Key features of the product
  - h. Warnings or restrictions
2. Run Spelling and Grammar checker in MSWord to ensure consistent usage in text and index for the following:
  - a. BatchView, not Batch View
  - b. DataLink, not Datalink
  - c. ProcessBook, not Processbook
  - d. An SAP \_\_\_\_\_ not a SAP \_\_\_\_\_
  - e. Click, not click on; double click, not double-click; right click, not right-click
  - f. Field name in manual = field name on screen shot, where applicable
  - g. Periods at end of sentences, the use of the possessive for the plural (e.g. RFC's, BAPI's), capitalization, etc.
  - h. Eliminate hyphen after PI in OSIssoft product names, per usage rules from the Marketing Dept.
3. Line up tables with associated text.
4. Eliminate empty lines in text, and adjust page breaks to eliminate orphan lines.
5. Update revisions page.

### Timeline

Day 1	Receive draft document
Day 3	Submit one chapter to Developer for review and comment
Day 4	Receive Developer's comments
Days 5-7	Complete revisions, incorporating Developer's suggestions
Day 7	Submit revised document to Developer for review
Day 9	Receive final comments from Developer
Day 10	Complete final updates for printing

## May I Change...?

1. Table name capitalization for consistency? (Head4 looks great)
2. addin to Add-in (which is a dialogue box name); sometimes add-in is used are these the same thing?
3. Replace should with must or rephrase as a command?
4. Id to ID? yes
5. Placement of texts references to screenshots for consistency?
6. Change wording in Chapter 15 of "Point Group and Point Group Member Table Configuration" to "RLINK Setup to do ..." to make it more consistent with the preceding heading, "SAP Set-up of Message to do Material Movements"
7. Add table heading to the first table in chapter 5 of PP-PI?
8. Re distribute the information in the tables in chapter 5 to allow more legible tables, e.g. take out the column with endtime, starttime, and a few other values, create separate tables for each value.
9. Standardize capitalization of starttime, endtime, and finish time.
10. In chapter 5, for **Each equipment-line** table, delete application\_id column, which is blank.
11. Standardize head levels to H4 for tables in Chapter 5 –Specialized Configuration Scenarios.

## 12. Questions for Developer

1. What spellings of RLINK are acceptable in which circumstances? I have seen RLINK, Rlink, rlinkuser, psrlink, PS-RLINK, RLINK-PM, and Plant Suite RLINK. If they are all okay, please distinguish them.
2. Verify which is correct and use consistently PlantSuite RLINK or PS RLINK
3. Should characteristic names be all caps (PPPI\_PLANT\_OF\_BATCH), all lower case (pppi\_plant\_of\_batch), title case (Pppi\_Plant\_Of\_Batch) or something else?
4. Whose characteristics are they? SAP? RLINK
5. Are there additional customization topics planned? If not, consider renaming chapter 9 "Localized Language Support," and eliminate the level 2 heading.
6. Audience definition questions:
  - a. Is RLINK more likely to be installed by an IT professional or a functional business professional?
  - b. Is the RLINK installer likely to be the user of RLINK?
  - c. Is the RLINK user likely to be an engineer?
  - d. Is the RLINK user likely to be SAP end user?
  - e. How likely is installer to be proficient in Microsoft SQL Server? Should we be making statements about the assumed proficiency in prerequisite products?
7. RLINK installation profile clarification questions:
  - a. What other OSIsoft products are typically installed with RLINK?
  - b. How likely is RLINK to be installed in the absence of other OSIsoft products?
  - c. Has there been a "virgin" installation of RLINK, that is one for which the ERP, other OSIsoft products, Microsoft infrastructure products were newly installed to support the RLINK application?
  - d. Has RLINK ever been installed at a customer site with no prior OSIsoft presence?
  - e. What specific SAP security authorization is required for installation or customization of RLINK? (In SAP terms)
8. Are these distinct items? (I ask, because names are so similar) stored procedure, translation procedure, translation method ... various capitalizations and hyphenations ...

## Future Considerations

1. Present tense
2. Active voice
3. Procedural tasks with numbered steps
4. Installation and maintenance tasks in typical SAP procedural style, standard SAP terminology, e.g., release rather than version, field names, etc.
5. Overall application of Microsoft technical publications style standards
6. Use standard Microsoft clicking terminology
  - a. Clicking
  - b. Click \_\_\_\_\_ and click \_\_\_\_\_ in the same sentence
7. Replace double space after sentences with single spaces. (Computer type fonts for periods and question marks are built anticipating this.)
8. Add comma to series -- a, b, and c
9. Re-visit the overall organization of topics for better clarity and usability:
  - a. Front matter to include copyrights, editorial conventions, etc.
  - b. Synopsis fore each chapter
  - c. Include an installation checklist
  - d. Present installation tasks in sequential order
  - e. Reference external installation sources, e.g. Microsoft Transaction Server, SAP, etc. rather than including those installation instructions in this document
  - f. Heading texts match content
10. Re-visit head levels.
11. Style for screen shots that standardizes spacing before and after and perhaps incorporates a caption
12. Re-shoot screen shots with SnagIt (smaller file size, consistent resolution)
13. Use SAP option to show transaction code in screen shots.
14. Hide task bar in screen shots.
15. Capitalize button names.
16. Consistently use a colon to introduce lists.
17. Consistently automatic numbering rather than manual numbering.
18. Use styles rather than manual formatting, if it does not change the look
  - a. Remove heading style from pictures, e.g. p.24?
19. Use heading style to introduce tables in Chapter 2 instead of bullets.
20. Consider adding definitions for technical terms and acronyms used in the book.
21. Follow each screenshot with something – maybe an instruction, a comment that points something out, or a caption so that the user knows what to look for.
22. Show menu paths in text rather than with screen shots.
23. When showing a sequence of screenshots, don't leave any out.
24. Show the application toolbars and buttons and their meanings.
25. Define acronyms at first use (and only at first use).

26. State SAP transaction code and/or menu path for each transaction referenced.
27. Call each object by its name rather than referring to it by various names, e.g., PM Configure application, PM Configuration Application, and Configuration Application all appear to the same object.
28. Refer to the user consistently in 2<sup>nd</sup> or third person.
29. Make text in graphics readable, for example, separate the two data flows on p109, present each in landscape. On p111 show only the Rlink\_pm.pdi\*, perhaps in landscape. Simplify some drawings, e.g., p112. In other cases, perhaps replace screen shot or flow with schematic drawings.
30. Add a "What's New in This Release" chapter.
31. Mark significant new changes relating to new release with a bar in the right margin.

## Internal Considerations

If document is larger than 250 pages, break it into two sections.

Naming conventions

- 8 character maximum file name
- Start name with 2-digit sequence number, e.g., 01PMCH1 (Sequence 01, RLINK PM Chapter 1)

Menu path for index entries:

Insert → Reference → Index and Tables... → Mark Entry...

Never auto mark