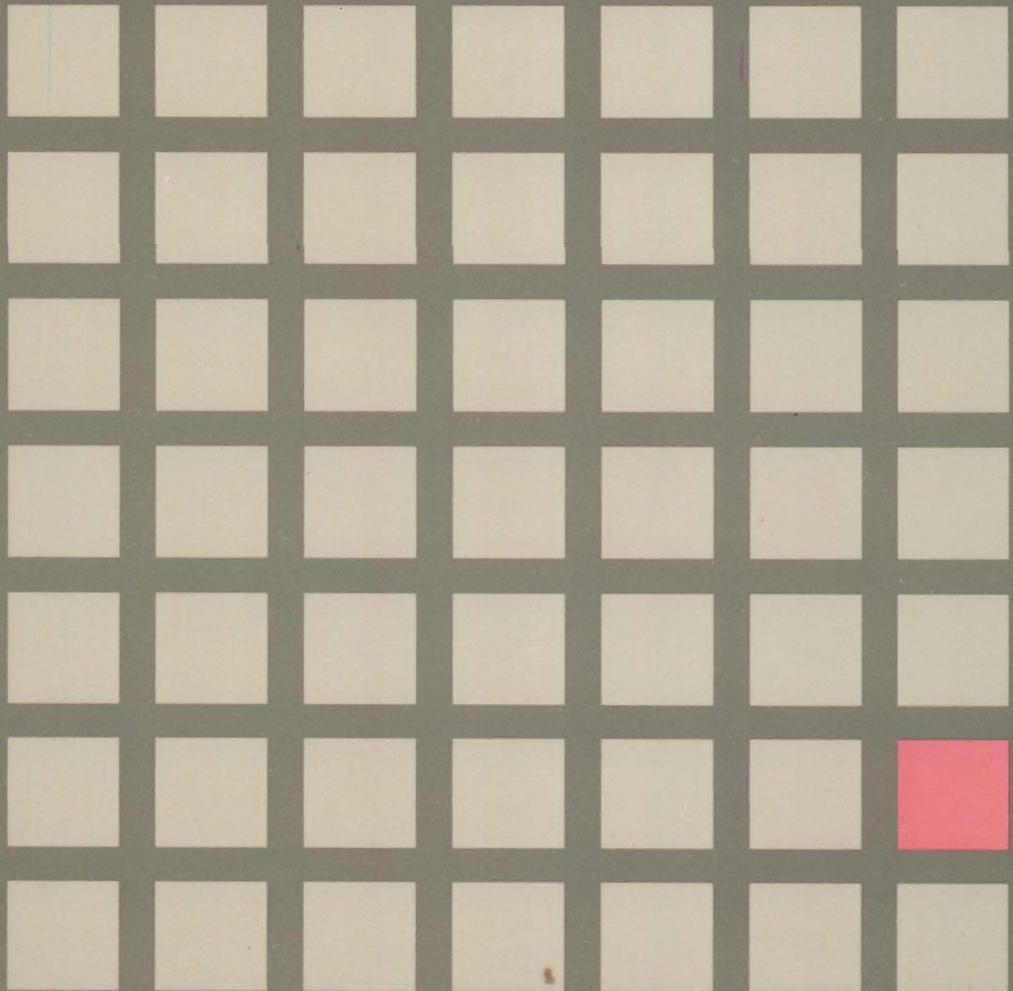


**Application Design Guidelines:
User Documentation**

5.1







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User Documentation**

5.1

Second Edition (March 1988)

This edition, SC24-5301-01, is a major revision of SC24-5301-00, and applies to the VM/Integrated System (VM/IS), which is based upon Release 5.1 of VM/Integrated System BASE, program 5664-301, and to all subsequent releases until otherwise indicated in new editions. Changes are made periodically to the information herein; before using this publication in connection with the operation of IBM systems, consult the latest *IBM System/370, 30xx, 4300, and 9370 Processors Bibliography*, GC20-0001, for the editions that are applicable and current.

Summary of Changes

For a list of the changes, see "Summary of Changes" on page 45.

Changes or additions to the text and illustrations are indicated by a vertical line to the left of the change.

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Preface

The VM/Integrated System (VM/IS) is a system for which many organizations, both inside and outside IBM create products and applications. The *VM/IS Application Design Guidelines: User Documentation* is meant for those who develop documentation for such products. This book consists mostly of printer guidelines—composition, layout, measurements, content, and other matters.

This book was prepared using the IBM product BookMaster, program number 5664-389. Naturally, the observance of the guidelines in this book is voluntary. However, the organization that follows these guidelines can be confident that its information is consistent in content and appearance with VM/IS documentation.

Note: Although the information in this publication is intended to describe current IBM guidelines for producing VM/IS and other VM documentation, nothing contained herein shall be deemed to represent, imply, or otherwise mean that IBM always follows these guidelines or that IBM will continue to follow these guidelines in the future. IBM, at its sole discretion, may delete, add to, replace, withdraw, or otherwise modify or change these guidelines at any time and in any manner.

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Chapter 1. Introduction

Consistency in the user interface is a key to customer satisfaction. It helps our customers increase their productivity, reduce their learning time, and cut their rate of errors. It is essential that all VM/Integrated System (VM/IS) products and applications present a similar, familiar, easily recognized user interface to the customer.

VM/IS has a wide spectrum of users. Though their computing experience varies widely, these users have one thing in common: the *user interface*. The user interface is nothing more than that part of VM/IS that the person sees—the entry panels, commands, messages, and *documentation*.

A VM/IS product's printed material—books, posters, pamphlets, on-line information, etc.—are surely its most visible characteristics. Publications professionals, then, must try to create documents that fit with the rest of the product's documentation. This means:

- Provide task-oriented documentation to support the operation and maintenance of the system.
- Project a cohesive system image by the use of attractive book covers, quality paper, and the use of color and design.

Each publishing group involved in the development of VM/IS products and applications may follow these guidelines. Though important, these guidelines are strictly voluntary.

Chapter 2. Task-Oriented Library Design

A task-oriented library is one that is organized around the tasks that people perform using a computer. Contrast this with a function-oriented library, which is organized according to the functions the computer is capable of performing.

In a task-oriented library, all the required information is grouped to support a particular task. This means that the information required to perform a major task is presented together — either all in one book or in a particular section of a book. All information in a task-oriented grouping is appropriate to the task being performed; it is free of extraneous information. The order in which the information is presented in a task-oriented book is dictated by the order in which the user performs the task's steps or subtasks.

The Tasks

The tasks around which the VM/IS library is designed are as follows:

EVALUATION

Examining and judging the applicability of a software product to an installation's needs.

PLANNING

Making fundamental decisions about the options a program offers and how each will fit into the organization's system. The decisions are presumably specified in written directions that are followed during the installation, customization, operation, administration, application programming, and program service tasks. Planning is an iterative task in that many of the decisions are made before installation, continually evaluated after installation, and revised as appropriate.

INSTALLATION

Making a program ready for use.

ADMINISTRATION

Managing the data processing resources used with an IBM program to meet the planned processing goals of an enterprise.

CUSTOMIZATION

Enhancing, extending, and otherwise altering a software product to meet an installation's special requirements.

OPERATION

Getting a program running, monitoring it to keep it operating, backing up and servicing the program, and shutting it down when no longer needed.

APPLICATION PROGRAMMING

Designing, coding, compiling, executing, debugging, and maintaining application programs to perform specific functions.

END-USE

Using a software product for the purpose for which it was made.

DIAGNOSIS/PROGRAM SERVICE

Isolating, describing, and correcting a software problem.

How the VM/IS Library Is Arranged

The “Learning to Use Your System” series

The *Learning to Use Your System* book takes a “package view,” describing how the products in the package work together to perform end-user tasks. The *Learning to Use Your System* book is the end-user’s first encounter with a particular package. It should stand by itself, allowing the end-user to perform the most basic of tasks without referring to another book.

For more information, see Chapter 4, “What Is a “Learning to Use Your System” Book?” on page 9.

The “Working with” primer series

Every VM/IS package contains a set of products. The end-user tasks of each of these products is detailed in a *Working with* primer. *Working with* primers expand and detail the overview material found in *Learning to Use Your System* books. Where a *Learning to Use Your System* book takes the view of an entire package of products, a *Working with* primer supports the end-user tasks of one product in that package.

For more information, see Chapter 3, “What is a Primer?” on page 5.

The “Managing” primer series

This series details the system administration tasks in a particular VM/IS product package. For example, the VM/IS base package comes with three books in this series: *VM/IS Planning for Your System*, *VM/IS Managing Your System*, and *VM/IS Reporting System Problems*. As these titles imply, each of these books devotes itself to a particular system administration task.

For more information, see Chapter 3, “What is a Primer?” on page 5.

Reference books

These books contain administration, end-use, and technical information about the products in the package. They contain more detail than the other primers and can be used as reference material.

For more information, see Chapter 7, “Specifications for Non-primer Type Manuals” on page 33.

Chapter 3. What is a Primer?

Much of the VM/IS library is made up of primers. This section of the book describes the idea behind the primer concept and the general characteristics of primers.

A primer is an easy-to-use tutorial, written for a beginner—that is, someone new to computing or new to a product. Generally, it contains only that information about a product that can be used by most of the people, most of the time. It avoids discussing the seldom-used and complex features of a product. It sticks to the basics. (The detailed, exhaustive information about the product is contained in non-primer materials. See Chapter 7, “Specifications for Non-primer Type Manuals” on page 33.)

Primers follow the basic rules of clear writing—active voice, simple sentences, imperative mood, and so forth. Use of these elements of style is considered a given when writing a primer and is, therefore, excluded from this discussion.

But there are also more elusive elements of style that can make the difference between a primer that is just easy to use and one that is also pleasurable, even fun, to use—one that de-mystifies the subject it explains, motivates its readers, and generates the positive response that we call user satisfaction.

Let’s briefly examine some of these elements of style that promote user satisfaction.

Define the Tasks that Users Perform

Task-oriented writing requires these steps:

1. Define user tasks. You can’t write a primer without first doing a task analysis.
2. If the task analysis includes all the tasks one can perform with the system, it is then up to you to select a *subset* of tasks appropriate for a new user. This can be tricky, but bear in mind that new users don’t care about the elegance of the system—they just want to be able to do their jobs.
3. Show users one way—the easiest way—to do any task. Don’t boggle their minds with lots of alternatives and options.

If you do your homework, you’ll be able to ensure that the information in your primer will be limited to what is required to perform specific tasks and that readers will get their words’ worth.

However, task-oriented writing means more than providing a list of procedures performed by rote. Webster defines “rote” as a “routine or repetition carried out mechanically or unthinkingly; a joyless sense of order.” Rote is boring, and boring information is usually meaningless and quickly forgotten. On the other hand, long conceptual passages make readers lose interest, because after all, their primary interest is getting the job done.

Therefore, you have to strike a balance between presenting concepts and describing procedures, a balance that makes the information *meaningful*. You must give readers an understanding of *why* they’re doing something, or why they might *want* to do something, so that they can synthesize the information. Very often readers see

only an explanation of function, which has no apparent relevance to their needs. In many cases, particularly for novices, that relevance must be pointed out.

Start with Great Beginnings

It is as important for titles and headings to be task-oriented as it is for the body of the text. Primers should use task-oriented titles and headings as much as possible. The following guidelines apply:

1. The first word of each title or heading could be a gerund indicating the task that the user is performing.

For example, a chapter about input mode could be “Entering Data,” a chapter about spooling considerations could be “Printing Copies of a File,” and so forth. Avoid piling up nouns. “Checking the Bits in the System Reference Code” is a better title than “System Reference Code Bit Checking.”

2. Tasks should be made to appear as simple and attractive as possible.

For example, “Adding Features” is better than “Installing Features,” and “Customizing Your System” is better than “Loading Microcode.”

3. Headings should be kept as short as reasonably possible.

“Performing Your First System Configuration” is a better title than “Performing the First System Configuration for Your System.” The main criteria for headings is *clarity* and *brevity*.

Make Users Feel Successful

Make sure your readers experience success as they learn the system. In order to do that, you must anticipate their needs, thereby avoiding potential confusion and/or errors. You can anticipate these needs by knowing your audience. But the best way to discover these needs is to *be* a user. Try out the functions documented in the specification for the product, system, or application. You will probably make the same errors that a user would make, and even if you don't, potential errors will occur to you. Thus, you will be able to document the procedures and functions as the user will see them.

Sometimes, a simple suggestion can prevent much frustration. For example, if you know that users are familiar with a typewriter but unfamiliar with a terminal keyboard, you might warn them not to use the number 1 key and the letter l key interchangeably. That's OK on a typewriter, but it can cause confusing error messages on a computer system, like “Invalid operand.”

Another way to ensure users' feelings of success is to reassure them that things are progressing normally, even when they may appear not to be.

Use Interactive Presentation

With interactive presentation, readers are instructed to perform the tasks under discussion, using real data. It also shows them the expected outcome, so that they can verify their results. By placing them in an active role, it *involves* the readers and reinforces what they are learning.

Interactive presentation requires careful planning because:

1. You have to correlate the order of the information presented with the exercises.
2. You can't skip any steps in the exercises.
3. You must ensure that everything works exactly the way you say it does. This may require you to provide on-line examples for the user to practice with.

Of course, rigorous testing will take care of numbers 2 and 3. The greatest challenge is number 1. But if your outline is orderly, logical, and cohesive, exercises will fit into it nicely, with only minor adjustments to the structure of the document.

Teach by Example

You can't have too many examples! Examples help readers understand concepts. Readers often follow examples step-by-step when performing a task, changing only command parameter values when needed. In fact, readers often look first for examples, bypassing the text.

Make examples meaningful, consistent, and easily understood. Use a consistent method of presenting examples within a book and throughout a library. If your examples can revolve around a "theme," such as a sample configuration for examples of installation procedures, they will be more cohesive.

Develop a Conversational Tone

Talk to your readers. Use everyday words and phrases, and write in a way that comes easily and naturally to you. But don't overdo it. Don't be too chatty ("Now, where were we?") or patronizing ("That was *easy*, wasn't it!"). In other words, talk to your readers, but don't talk down to them.

You can develop a conversational tone by using the second person (which annoys a few people, but it does personalize the text) and by involving the reader ("Let's create another file.").

Use of analogy also makes your writing conversational, because in a way, you reach out to the reader when you explain something in terms with which the reader can identify.

Conclusion

A primer is a user-friendly manual, one that gets information across to users in the clearest, simplest, and most interesting way; make its tone reassuring and supportive. Use of the stylistic devices discussed in this chapter will help you achieve that tone and ensure that users get the right kind of documentation to meet their information needs. The benefits will be well worth your effort.

What is a Primer?

Chapter 4. What Is a “Learning to Use Your System” Book?

In addition to primers, the VM/IS library contains a series of books called *Learning to Use Your System*.

What Do “Learning to Use Your System” Books Contain?

These books contain a brief introduction to a collection of products of which they give a package view. Using a task-oriented writing style, they teach customers how to use your product package within the VM/IS system. The *Learning to Use Your System* books provide easily understood instructions, written in a simple, straightforward style, designed to make the end-user feel comfortable about doing basic tasks.

For Whom Are these Books Written?

The *Learning to Use Your System* books are mainly for first-time users of VM/IS who want a brief introduction to the function of your product package and who want to learn basic tasks quickly.

Why Are these Books Useful?

Learning to Use Your System books are result-oriented. That is, end-users follow clearly written instructions and get results immediately, thereby learning essential “how-to-do” information quickly and easily. The *Learning to Use Your System* books teach end-users how to perform common tasks by working with the sample programs and examples supplied with your product. End-users grow in confidence as they work successfully through the tasks described. They learn how to use the VM/IS panels to reach and work with your product. The books provide a sampling of the most common and frequently performed tasks. Users are referred to the *Working with* primers contained in the VM/IS library for more detailed information.

How to Write a “Learning to Use Your System” Book

A *Learning to Use Your System* book is very similar in writing style to the primers described in Chapter 3, “What is a Primer?” on page 5. It describes how to perform tasks in a user-friendly way and gives complete instructions in a “cookbook” style. In a list of instructions to carry out a task, each action the user takes is described in a separate step. Color is used to highlight the input information that users are required to type on the keyboard. Wherever possible, only one way of doing a task is shown.

What is a “Learning to Use Your System” Book?

Chapter 5. Specifications for Primer-Type Manuals

Now that we've outlined what a primer is and what a *Learning to Use Your System* book is, here are their specifications.

Fonts

Front Cover and Title Page

The words "VM/Integrated System"	12 point Helvetica ¹ bold
Book Title	24 point Helvetica bold
(Release) Number	12 point Helvetica
Form Number	12 point Helvetica
Short Title ²	12 point Helvetica bold
VM Symbol	27 picas wide x 27 picas deep - depressed embossed squares to be 3 picas wide x 3 picas deep with 1 pica between squares (7 squares across x 7 squares deep)
Logo	24 point

Back Cover and Inside Back Cover

Address	8 point Helvetica bold
File Number	8 point Helvetica bold
Printed in [country]	8 point Helvetica bold
Form Number	10 point Helvetica
Logo	40 point

Spine

Book Title (shortened version)	14 point Helvetica bold
Logo	12 point

Head Levels

Head 0	Title - 14 point Helvetica The word "PART" - 36 point Helvetica light lower case The "number" of the part - 72 point Helvetica bold
Head 1	14 point Helvetica bold
Head 2	14 point Helvetica

¹ Helvetica is a registered trademark of the Eltra Corporation; Brooklyn, New York.

² Only with saddle-wire binding.

Primer Specifications

Head 3	12 point Helvetica
Head 4	12 point Helvetica
Head 5	11 point Helvetica bold
Head 6	11 point Helvetica bold italic

Basic Text

Base text	11 point Helvetica
Italic font	11 point Helvetica italic
Bold font	11 point Helvetica bold
Bold italic font	11 point Helvetica bold italic
Upper case	9 point Helvetica
Running Foot	9 point Helvetica
Page Number	9 point Helvetica
Figure text	9 point Helvetica
Figure caption	9 point Helvetica bold
Footnote font	10 point Helvetica
Table Header	9 point Helvetica bold
Table Text	9 point Helvetica
Example Font	8 point ISIL Gothic ³
Menu Sequence Font	8 point ISIL Gothic
Terminal Screen Font	6 point ISIL Gothic
Note Font	11 point Helvetica bold 11 point Helvetica

Notices Page

Notices Edition	10 point Helvetica bold
Notices Text	10 point Helvetica 10 point Helvetica italic 10 point Helvetica bold

Preface Page (called "About This Book")

Heading	14 point Helvetica bold
Text font	11 point Helvetica

³ ISIL Gothic is a monofont included with the IBM product BookMaster, program number 5664-389.

Contents Page

Contents heading	14 point Helvetica bold
Head 0	14 point Helvetica bold
Head 1	10 point Helvetica bold
Heads 2 and 3	10 point Helvetica

Back Matter

Summary of Changes	Heading 14 point Helvetica bold; text 9 point Helvetica
Glossary	Heading 14 point Helvetica bold; text 9 point Helvetica
Bibliography	Heading 14 point Helvetica bold; text 9 point Helvetica
Index	Heading 14 point Helvetica bold; text 9 point Helvetica

Layout

See Figures 2, 3, 4, and 5 for Primer Grids. See Figure 6 on page 25 for an illustration of cover with back cover wrap-around.

Width	42 picas (7 inches)
Depth	51 picas (8-1/2 inches)
Top Margin	6 picas
Bottom Margin	3 picas
Bind Margin	5 picas
Outside page to text	3 picas
Page text width	34 picas
Column text width	29 picas
Offset	5 picas
Text depth	40 picas
Folio placement	3 picas (from bottom and outside edge)

Offset style: This is the preferred style. Column width = 34 picas for heads offset 5 picas for text - 29 pica text column.

Single column style: Column width = 34 picas.

Two column style: Column width = 16 picas with 2 pica **gutter** between columns.

Front Cover

Book Title	3 picas from top of page to top of text; 12 picas from left page edge
Short Title	(for saddle-wire books) 3 picas from top of page to top of text; 1.5 picas from left page edge; text is at 90 degrees to the rest of the cover text and is read from the top to the bottom of the page
Product Name	11 picas from top of page to top of text; 12 picas from left page edge
(Release) Number	12.6 picas from top of page to top of text; 12 picas from left page edge
Form Number	14.6 picas from top of page to top of text; 12 picas from left page edge
VM Symbol	16.6 picas from top of page to top of symbol; 12 picas from left page edge; VM Symbol to be depressed embossed
Logo	Baseline of your logo is 2 picas from bottom of page and 12 picas from left page edge

See Figure 7 on page 26 for front cover layout.

Title Page

The title page contains the same information and follows the same layout as the front cover. For saddle-wire books, the short title will not appear on the title page.

See Figure 7 on page 26 for title page layout.

Back Cover

Short Title	(for saddle-wire books) 3 picas from top of page to top of text; 1.5 picas from right page edge (rotated text as on front cover)
Address	2 picas from top of page to top of text; 3 picas from left page edge
File Number	6.2 picas from top of page to top of text; 3 picas from left page edge
Printed in [country]	7 picas from top of page to top of text; 3 picas from left page edge
Form Number	8.6 picas from top of page to top of text; 3 picas from left page edge
Logo	Baseline of your logo is 2.6 picas from bottom of page; 3.8 picas from left page edge
Bar code	Right edge of bar code area begins 6.6 picas from right page edge; 2 picas from bottom of page. Area is 18 picas wide and 7.6 picas deep. Bar code and number should be centered within the bar code area.

See Figure 8 on page 27 for outside back cover layout.

Inside Back Cover

The inside back cover contains the same information and follows the same layout as the back cover, with the exception of the bar code, which does not appear on the inside back cover. For saddle-wire books, the short title will not appear on the inside back cover.

See Figure 9 on page 28 for inside back cover layout.

Spine

Book Title	2 picas from top of spine, centered front to back
Logo	2 picas from bottom of spine, centered front to back

See Figure 10 on page 29 for spine text layout.

Head, Rule, Tracking Symbol, and Text Placement

Head 0 (with two-page artwork spread)

Part opener - consists of back and front page.

Start baseline of the word “Part” 12 picas from top of page and 18 picas from left edge of page width text. Space from baseline of the word “Part” to top of part title is 17 picas. Title is formatted in 16 pica column flush left.

Head 0 (with no artwork)

On part opener page with no artwork, 14 point **rule** starts 13 picas from top of page; rule measures 21 picas long; head 0 title and rule start 18 picas from left page edge; text placement is 2 picas from top of rule to baseline of title.

Text following head is 4.6 picas from baseline of head 0 text to top of following text.

Head 1 (Includes Preface, Contents, Figures, and all other Head 1’s)

Starts 6 picas from top of page with a 10 point rule - width of rule varies to width of head 1 text; single column style; text placement 2 picas from top of rule to baseline of title.

Text following head is 4.6 picas from baseline of head 1 text to top of following text.

Tracking Symbol (Following Head 1’s)

On a head 1 page, the spacing from the baseline of the head 1 to the top of the graphic is 4.6 picas. Tracking symbol is 19 picas deep by 29 picas wide. Text following is 1.6 picas from bottom of tracking symbol to top of text.

Tracking Symbol (as running head)

Size is 4 picas deep by 6 picas wide. Place 1 pica from top of page and 3 picas from right edge of page. To be placed on odd pages *only*.

Head 2

If at top of page, start 6 point rule 6 picas from top of page; single column style.

If in text, start rule 3 picas from baseline of previous text to top of rule; single column style.

Text of head is 2 picas from top of rule to baseline of head text and rule is 34 picas wide.

Text following head is 1.3 picas from baseline of head to top of following text.

Head 3

If at top of page, start 4 point rule 6 picas from top of page; single column style.

If in text, start rule 2 picas from baseline of previous text to top of rule; single column style.

Text of head is 1.6 picas from top of rule to baseline of text and rule is 34 picas wide.

Text following head is 1.3 picas from baseline of head to top of following text.

Head 4

If at top of page, start 2 point rule 6 picas from top of page; single column style.

If in text, start rule 2 picas from baseline of previous text to top of rule; single column style.

Text of head is 1.6 picas from top of rule to baseline of text and rule is 34 picas wide.

Text following head is 1.3 picas from baseline of head to top of following text.

Head 5

Flush left with column followed by colon, two character spaces and the paragraph text on same line.

Head 6

Flush left with column followed by colon, two character spaces and the paragraph text on same line.

See Figure 1 on page 20 for sample head levels.

Notices Page

Edition Notice

3 picas from bottom of page and 2.6 picas from outside of page; edition notice runs full page width (34 picas)

Contents Page

Head 0

Space in front of head is 2.6 picas

Head 1

Space in front of head is 6 points

Head 2

No space in front of head

Head 3

No space in front of head

Basic Text

Leading

11 point type on 13 point line spacing. In general, leading is two points greater than font size.

Page width text

Text starts 6 picas down from top of page 3 picas from outside on even page and 5 picas from bind on odd page. Text ends 46 picas from top of page.

Column width text	Text starts 6 picas down from top of page 8 picas from outside on even page and 10 picas from bind on odd page. Text ends 46 picas from top of page.
Running Foot	3 picas from outside edge and 3 picas from bottom of page.
Example text	Can be full page width (34 picas) or column width (29 picas).
Terminal Screen text	Column width (29 picas) with rounded corners on screen rule. The screen line spacing is 7 point.
Tracking Symbol	Place on odd pages 1 pica from top of page and 3 picas from outside edge. Size of graphic to be 6 picas wide by 4 picas deep.

Back Matter

Summary of Changes	Offset style
Glossary	2 column style
Bibliography	Offset style
Index	2 column style

Production Specifications

Ink text

Four-color process printing for photographs/illustrations; black and 10%, 30%, 100% of task color for text

Ink cover

PMS⁴ 429, task color with depressed embossing

Paper text

70 lb. Patina⁵ Matte Book or 70 lb. Warren⁵ LOE Dull Book

Paper cover

12 point cast coated (coated one side)

Punching

Punch for Wire-O⁶ binding

Binding

White Wire-O

Size

7 inches wide x 8-1/2 inches high

Back Cover

Wrap around 13 inches wide (includes spine) x 8-1/2 inches high. Score and fold at 7 inches and at thickness of book.

⁴ **PMS** (Pantone Matching System) is a check-standard trademark of Pantone, Incorporated; Moonachie, New Jersey.

⁵ **Patina** and **Warren** are registered trademarks of the Scott Paper Company; Delaware County, Pennsylvania.

⁶ **Wire-O** is a registered trademark of the Wire-O Corporation; Poughkeepsie, New York.

Color Applications

VM Symbol Colors for Task-Oriented Libraries

The VM symbol is printed in 100% of the task color. The color of the symbol indicates the task to which the publication relates. The task colors are as follows:

<i>TASK</i>	<i>COLOR</i>
Evaluation	PMS 293 Blue
Planning	PMS 362 Green
Installation	PMS 199 Red
Diagnosis/Program Service	PMS 266 Purple
Customization	PMS 165 Orange
Operation	PMS 130 Yellow
End-Use (“Learning to Use”, “Working with”)	PMS 215 Cranberry
Administration (“Managing”)	PMS 326 Turquoise
Application Program Development	PMS 219 Pink

For a book belonging to a library that is not task-oriented, select the color associated with the task that most closely fits the book.

Front Cover

Background is white. Text to be printed in 100% PMS 429. Design to be printed in 100% task color.

Title Page

Black print.

Preface

Heading and rule to be printed in 100% task color. May have four-color process printing with part opener photographs/ illustrations. If no part openers exist, may have small chapter tracking symbol graphics (see tracking symbols).

Contents

Heading, rule, and head 0’s to be printed in 100% task color. If no head 0’s exist, head 1’s to be printed in 100% task color. Balance of text to be printed in black.

Head 0 with Two-Page Artwork Spread

To be printed in four-color process printing - photographs/ illustrations bleed across binding. White type reversed out of 70% task color background, which bleeds off all four sides.

Head 0 with no Artwork

Heading and rule to be printed in 100% task color.

Head 1 page

Heading and rule to be printed in 100% task color. Tracking symbol outline and background print in 100% task color; screen open areas 30% task color.

Head 2, 3, and 4

Heading and rule to be printed in 100% task color.

Tracking Symbols

Tracking symbol outline and background print in 100% task color; screen open areas 30% task color.

Text

Selected text to be printed in 100% task color.

Terminal Screens

Outside rule with rounded corners to be printed in 100% task color. Interior to be screened in 10% task color. Text to be printed in black.

Tables

To have a 10% task color screen over selected columns and/or selected text to be printed in 100% task color.

Glossary

Heading, rule, and glossary terms are to be printed in 100% task color.

Index

Heading, rule and index letter separators are to be printed in 100% task color.

Back Cover

Background is white. Text to be printed in 100% PMS 429. Bar code to be printed in black.

Spine

Text and your logo to be printed in 100% task color.

Note: Book designer should use discretion when specifying percentages of colors because of the brilliance of some task colors.

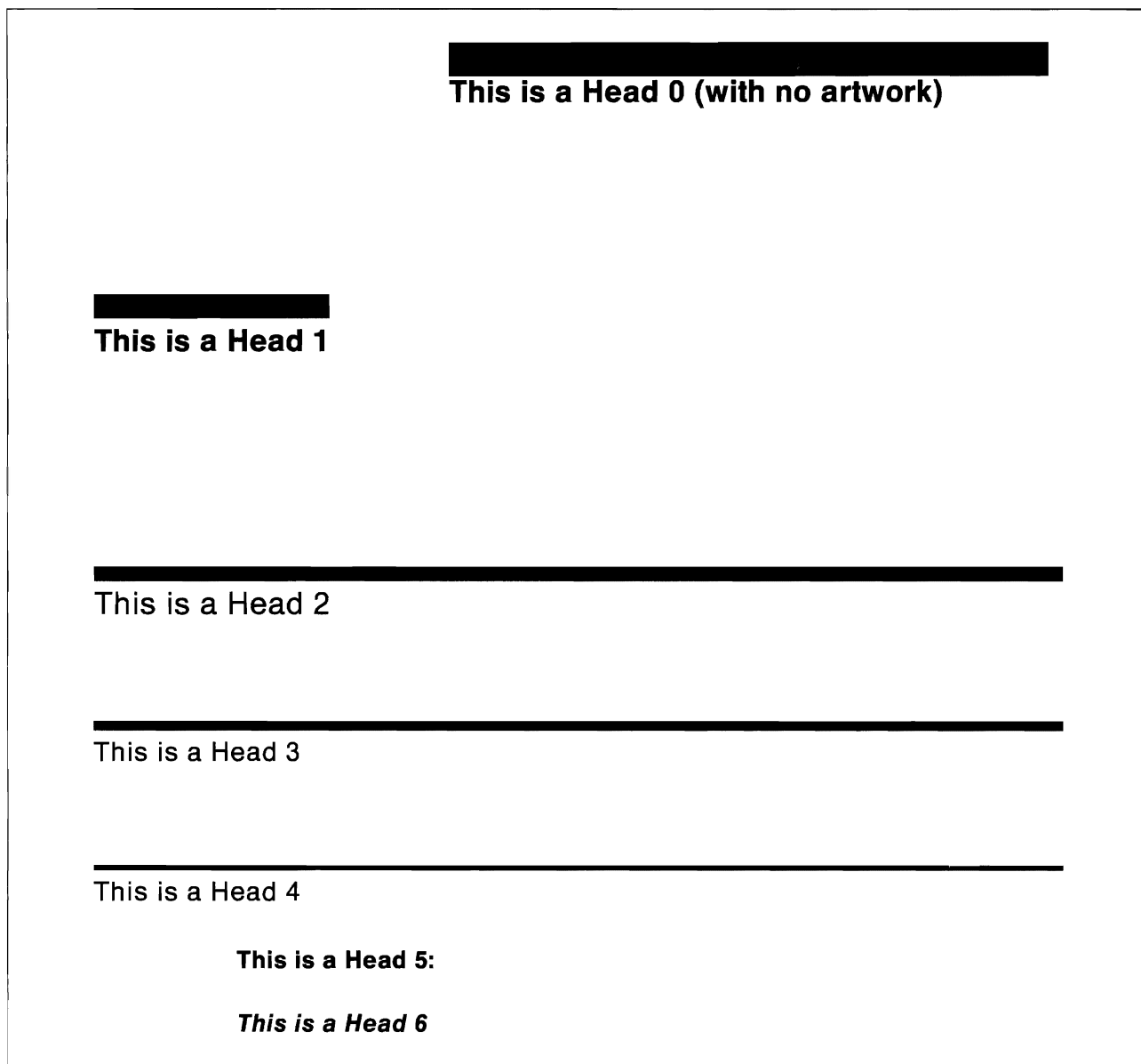


Figure 1. Sample Primer Head Levels

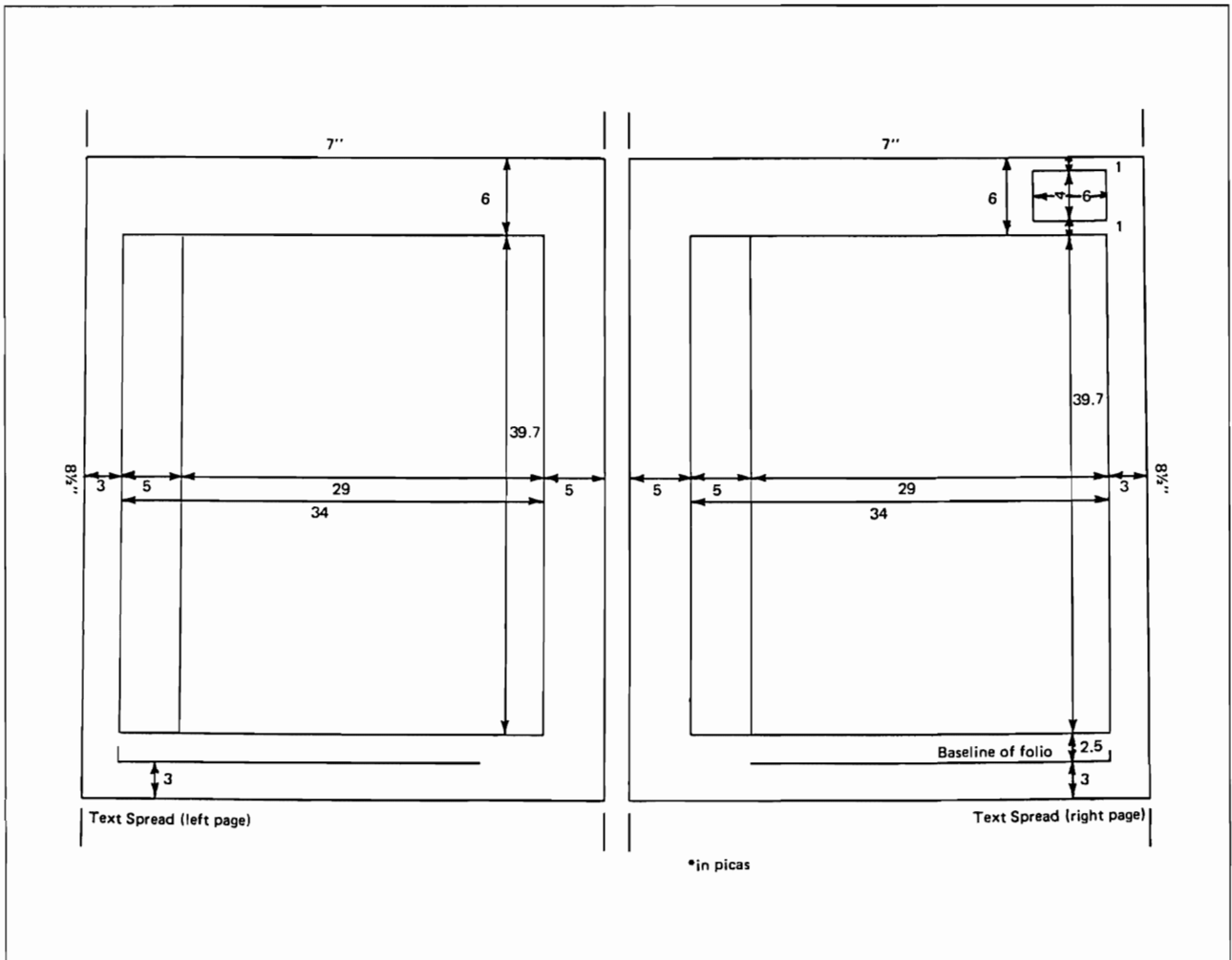


Figure 2. Primer Grids

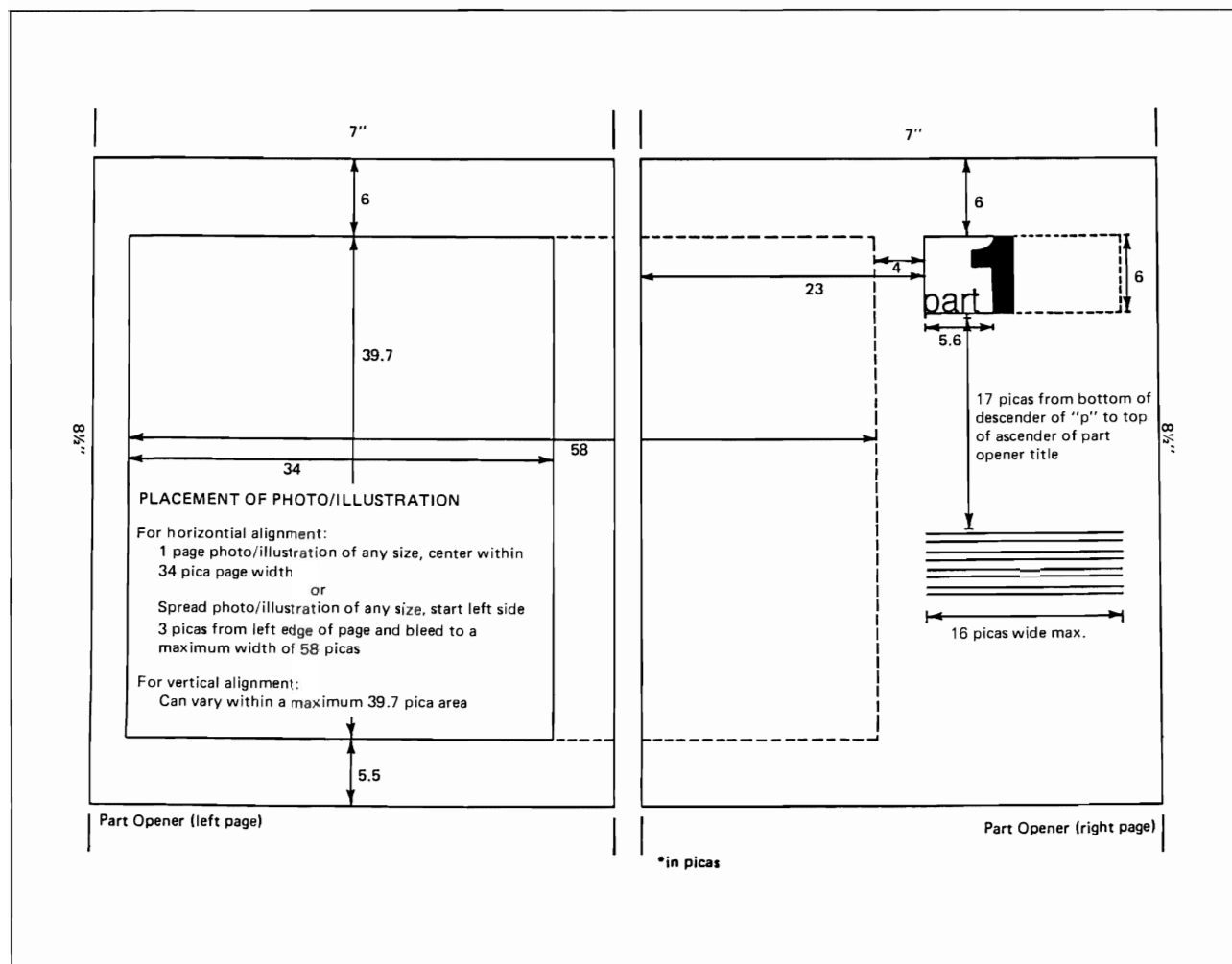


Figure 3. Part Opener Primer Grid

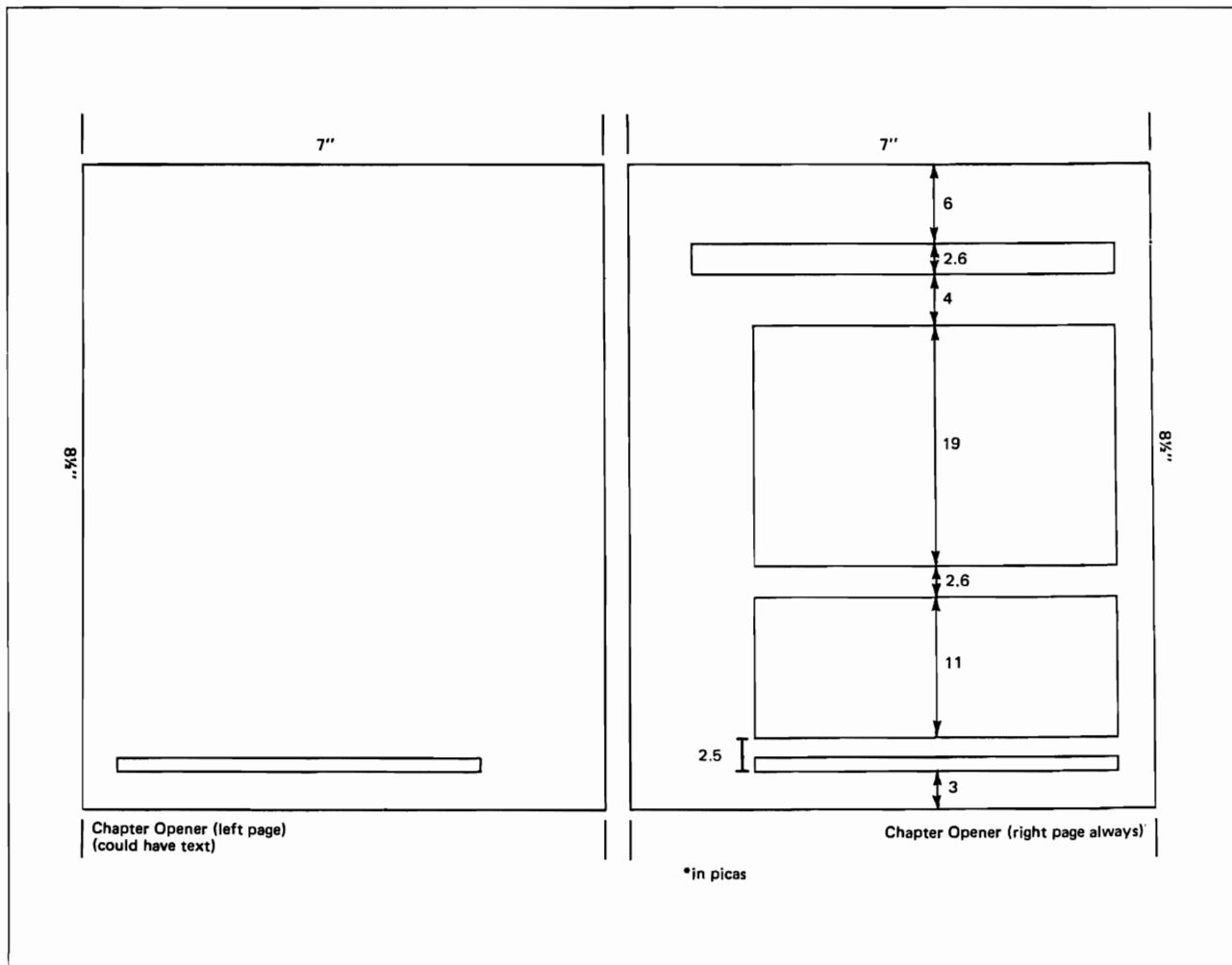


Figure 4. Chapter Opener Primer Grid (One Column)

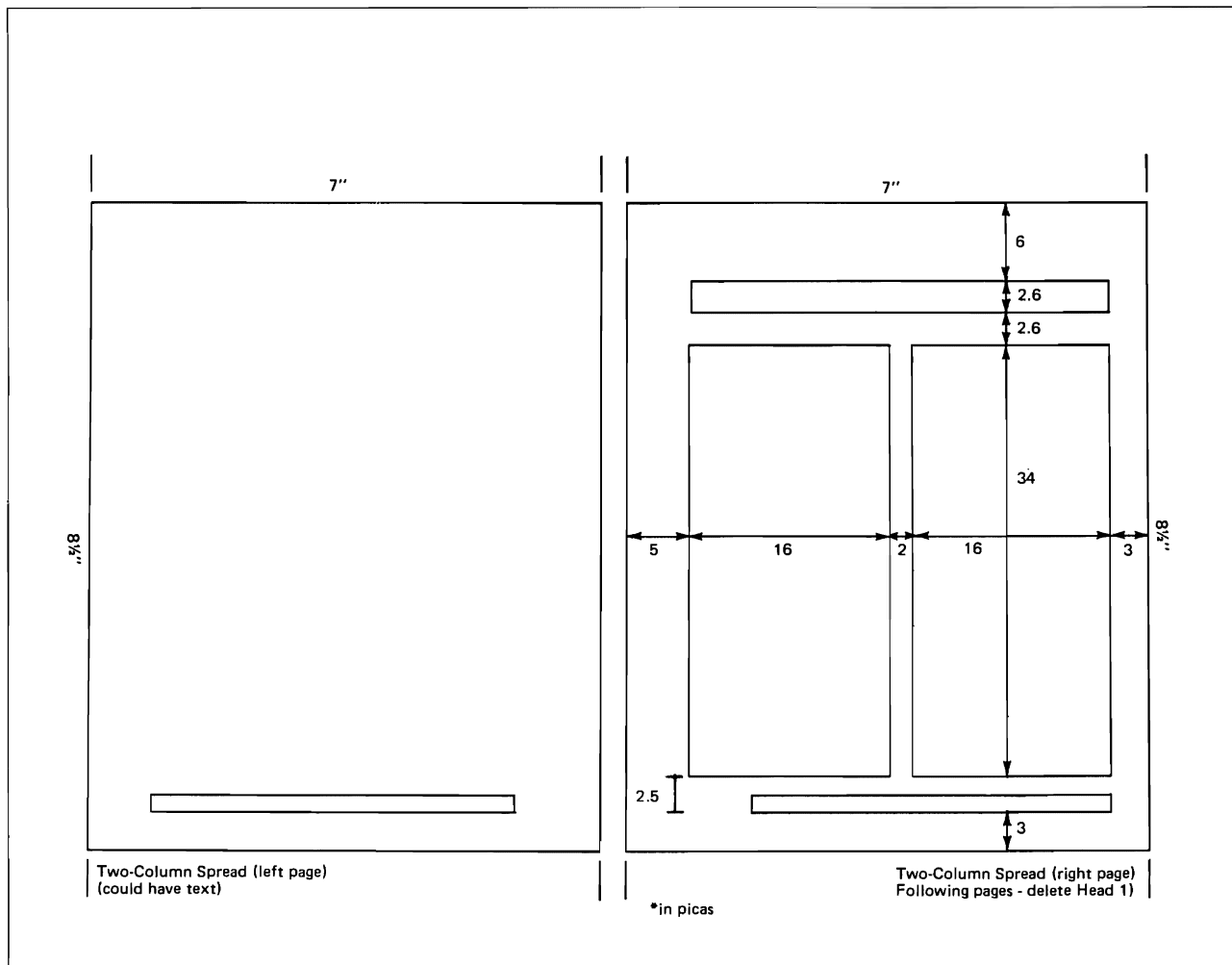


Figure 5. Chapter Opener Primer Grid (Two Column)

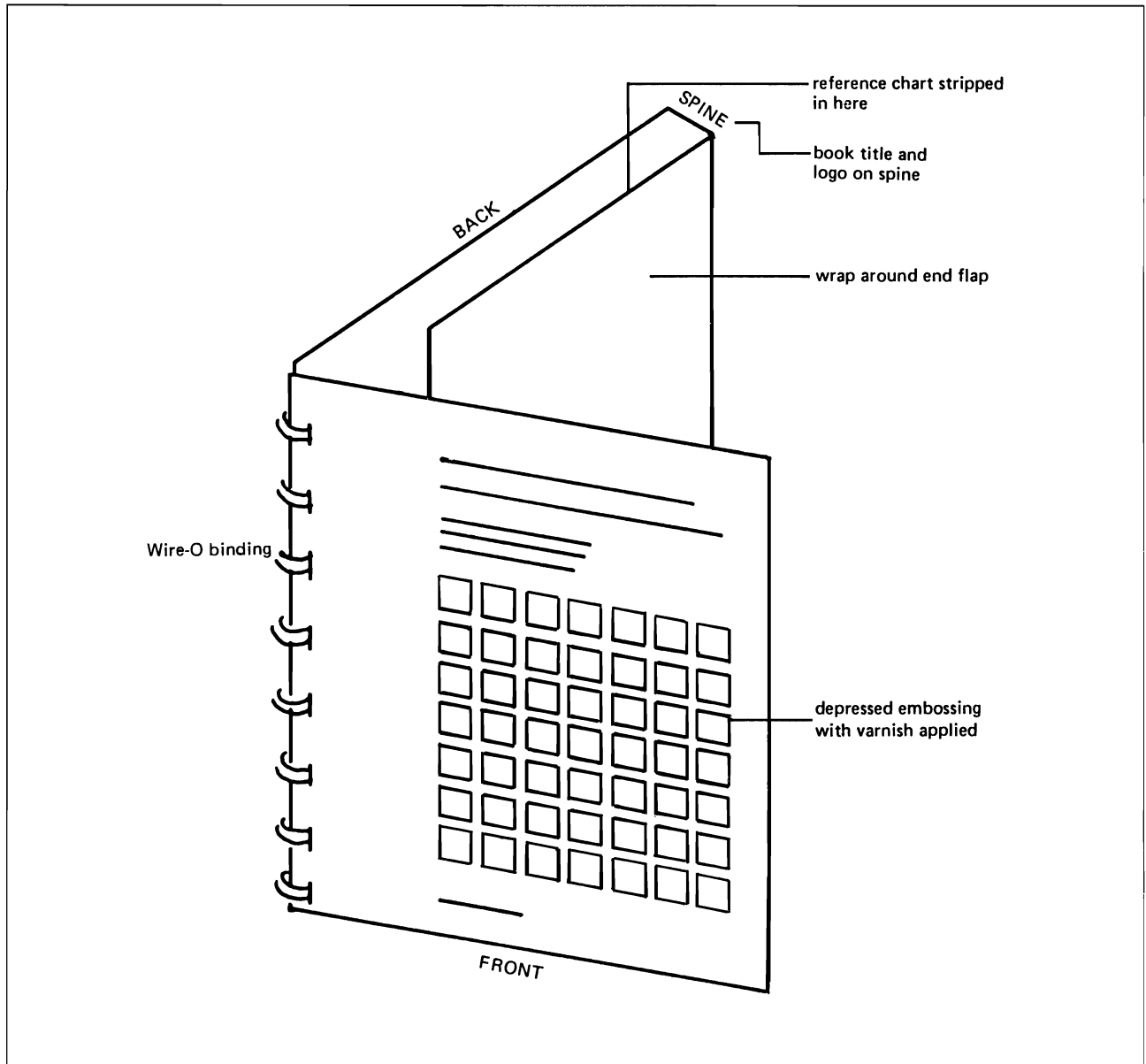


Figure 6. Illustration of Cover Wrap-Around and Depressed Embossing for Primer

Managing Your System

VM/Integrated System

5.1

SC24-5338-02

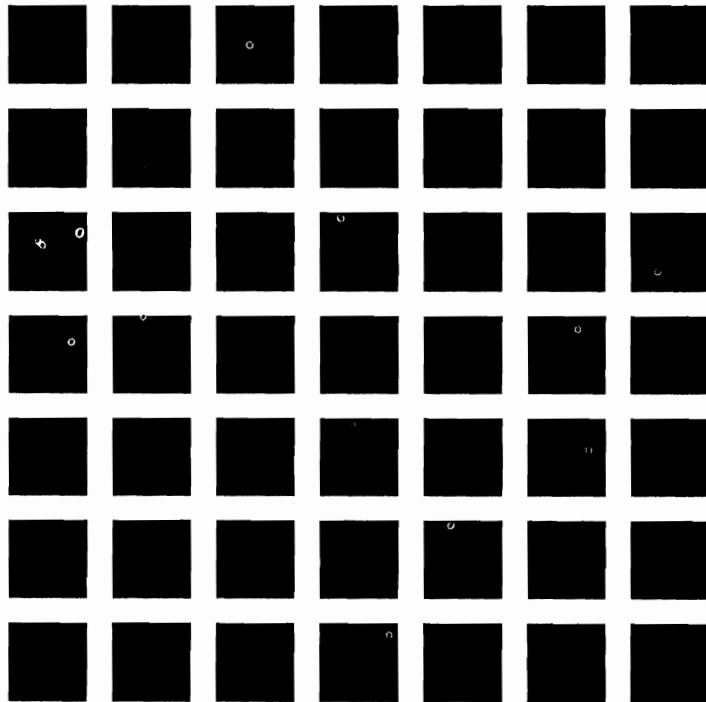


Figure 7. Primer Front Cover and Title Page

International Business
Machines Corporation
P.O. Box 6
Endicott, New York 13760

File No. S370/4300-39
Printed in U.S.A.

SC24-5338-02

IBM
®



Figure 8. Primer Outside Back Cover

**International Business
Machines Corporation
P.O. Box 6
Endicott, New York 13760**

**File No. S370/4300-39
Printed in U.S.A.**

SC24-5338-02



Figure 9. Primer Inside Back Cover

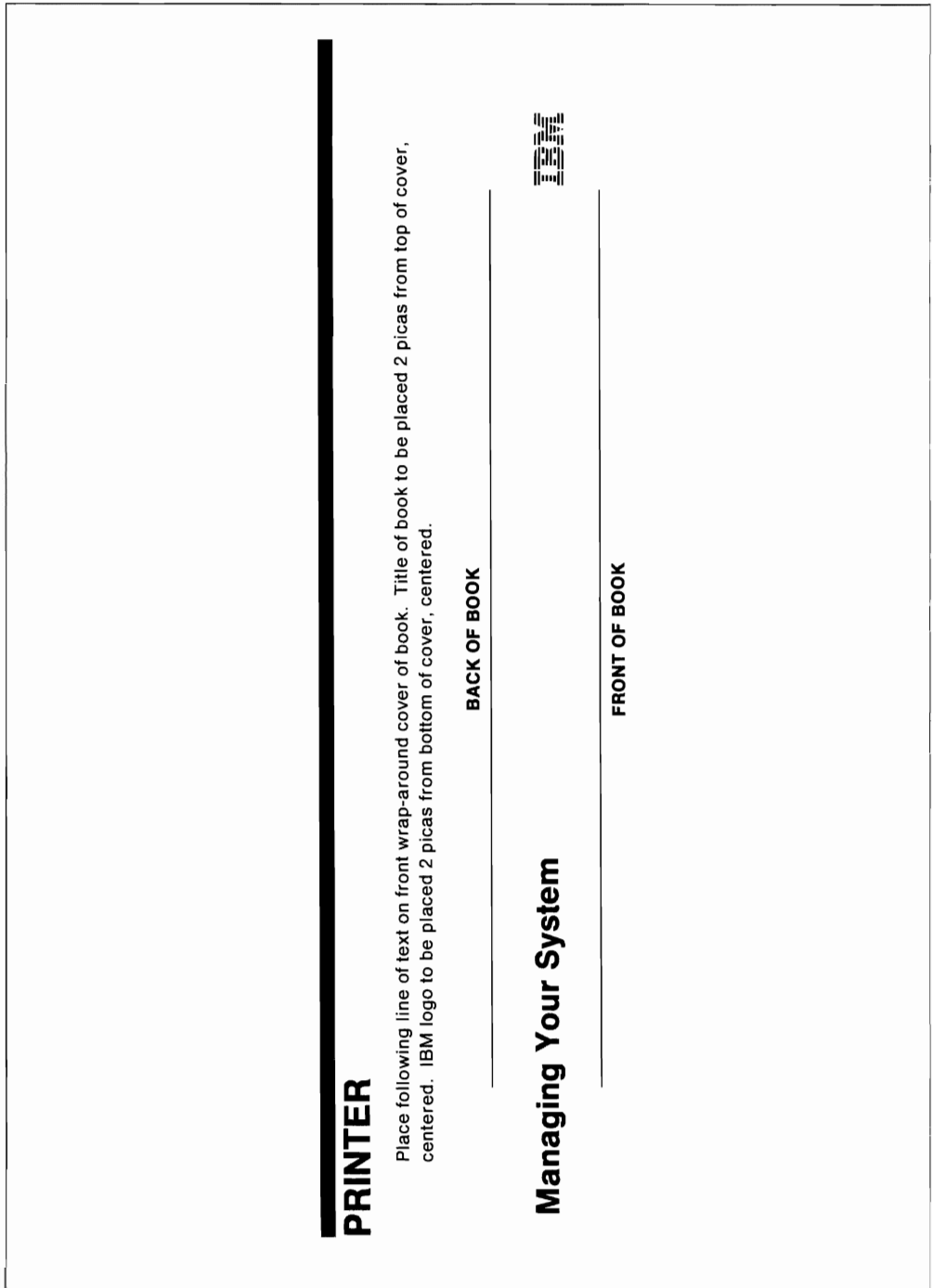


Figure 10. Primer Spine Text

Chapter 6. Publication Packaging and Distribution

VM/IS groups its publications according to the base products or optional packages to which they belong. The publications in each package are further organized by task (end-use, administration, etc.) and by the reader's level of experience.

The publications could be pre-packaged into library kits (or shipped individually—whichever is more appropriate) and distributed with the software.

The following sections outline some considerations for packaging and distributing your publications.

Distribution

In general, you have two goals when deciding how to distribute your materials:

1. Be certain that the publications are delivered with the software.
2. Arrange it so that each publication item can be ordered separately. And, if appropriate, group the publications in kits that can be ordered, too.

Packaging

Packaging considerations focus on helping the customer:

- Find the shipment
- Verify that the shipment is correct
- Store the publication materials
- Comment on the shipment.

Here are some suggestions to consider.

Carton Labels

It would be helpful to have a label on the shipping carton that clearly says ***Publications Enclosed***.

Publications for computer novices could be in a carton labeled ***Primer Publications***.

End-user publications could be in a carton labeled ***End-User Publications***.

Publications for the system administrator could be in a carton labeled ***Administrator Publications***.

Reference publications could be in a carton labeled ***Technical Publications***.

Checklist

A checklist can be packed inside each carton that contains the name of each publication item and its order number in that carton.

Paper: 50 pound opaque

Color: White (all copy is black)

Layout: See the fictional example that follows in Figure 11 on page 32.

<i>XYZ Application Program</i>	
Order Number 1234567890	
Box 1 of 1	
Checklist	
As you unpack Box 1, check to make sure you have all the items listed below. If anything is missing, call your sales representative. If you want to order more copies of a particular item, mention the order number.	
Order Number	Publication Item
XYZ-0000001	XYZ: Planning
XYZ-0000002	XYZ: Installation
XYZ-0000003	XYZ: Day-to-Day Use
XYZ-0000004	XYZ: When Problems Occur

Figure 11. An Example of a Packing Checklist

Publication Storage

Consider these techniques for meeting the customer's document storage requirements:

The VM/IS library includes custom-made, plastic, snap-together bookends to allow for convenient document storage. The bookends are shipped with the VM/IS BASE primer kit.

Binders can be used to help group 8 1/2" by 11" publications for a particular application.

Customer Response Card

It would be helpful to include a card that allows the customer to comment on the shipment. The postage on this pre-addressed card should be pre-paid by your organization.

The card might ask for information like:

- The name of the person installing the product
- Their occupation and level of experience
- Whether the publication materials arrived with the software
- If they arrived separately, the dates on which they arrived
- The condition of the shipment when it arrived
- Any other comments by the customer.

Chapter 7. Specifications for Non-primer Type Manuals

It is possible that, for some reason, you may want to publish a VM/IS book that is not primer style. In such cases, use the specifications for the basic non-primer type manual.

Such a book might cover one of several topics about a particular product, system, or application, such as:

- General information
- Guidance
- Reference
- Logic
- Problem determination.

Front Cover

All VM/IS books have separate covers. This is also true of books on related products and applications.

Paper: 10 point Carolina⁸, coated one side

Color: PMS 415. Do not print on overleaf. Except for the VM symbol and the rule, all copy is white, reverse print. Entire cover should have a gloss **varnish**.

Layout: Refer to the front cover of this manual for front cover layout.

Type sizes:

Rule	0.5/4 point
Product Name	18 point Helvetica
Book Title	18 point Helvetica bold
Logo	20 point
(Release) Number	18 point Helvetica
Form Number	9 point Helvetica
VM Symbol Size	31 picas x 31 picas

Placement:

Rule

Top of 0.5/4 point rule begins 3 picas from top of page. The 0.5 point rule begins 6 picas from left page edge and measures 9 picas long. The 4 point rule begins 15 picas from left page edge and measures 31 picas long.

Logo

Top of your logo should begin 1 pica from top of 0.5 point rule and 6 picas from left page edge.

⁸ **Carolina** is a registered trademark of the Federal Paper Board Company, Incorporated; Montvale, New Jersey.

Text (left edge to align with 4 point rule)

Product name text begins .6 picas from baseline of 4 point rule and 15 picas from left page edge. Book title begins 2 picas from Product Name text with a column width of 31 picas and leading of 18 points. Release number begins 2.25 picas from baseline of book title. Form number begins .6 picas from baseline of 4 point rule and is flush right with end of 4 point rule.

VM Symbol

Place 5.6 picas from outside edge of page and 6 picas from bottom of page.

VM Symbol Colors for Task-Oriented Libraries: The VM symbol and rule are white, reverse print. The VM symbol is then printed in PMS 413, with the exception of one square within the symbol. This square will be printed in 100% of the task color. The square to be printed in the task color is in the far right column, second up from the bottom of the graphic. The rule on the cover will also be printed in the task color. The color of the one square and rule indicates the task to which the publication relates. The task colors are listed below. Note that the PMS colors differ from the colors used in primer publications. The base colors are the same, but the shades of the colors are different.

<i>TASK</i>	<i>COLOR</i>
Evaluation	PMS 285 Blue
Planning	PMS 354 Green
Installation	PMS 032 Red
Diagnosis/Program Service	PMS 258 Purple
Customization	PMS 165 Orange
Operation	PMS 123 Yellow
End-Use	PMS 207 Cranberry
Administration	PMS 320 Turquoise
Application Program Development	PMS 190 Pink

For a book belonging to a library that is not task-oriented, select the color associated with the task that most closely fits the book.

Back Cover

Paper: 10 point Carolina, coated one side

Color: PMS 415 with gloss varnish. Do not print on overleaf. All copy, including rule, is white, reverse print. The rule is then printed in 100% of the task color. The bar code is printed in PMS 415 on reverse white background.

Layout: Refer to the back cover of this manual for back cover layout.

Type sizes:

Rule	0.5/4 point
Program Number	9 point Helvetica
File Number	9 point Helvetica
Printed in [country]	9 point Helvetica
Logo	20 point

Placement:**Rule**

Top of 0.5/4 point rule begins 3 picas from top of page. The 0.5 point rule begins 5 picas from left page edge and measures 9 picas long. The 4 point rule begins 14 picas from left page edge and measures 31 picas long.

Logo

Top of your logo should begin 1 pica from top of 0.5 point rule and 5 picas from left page edge.

Program Number

Flush left with 4 point rule and .6 picas from baseline of 4 point rule. If more than one number is necessary, they should be stacked.

File Number

Text begins 27 picas from left edge of 4 point rule and .6 picas from baseline of 4 point rule.

Printed in [country]

Text begins 5 picas from left page edge and 2.25 picas from bottom edge of page to baseline of text.

Bar code

Right edge of bar code area begins 6.6 picas from right page edge; 2 picas from bottom of page. Area is 18 picas wide and 7.6 picas deep. Bar code and number should be centered within the bar code area.

Front and Back Covers for Licensed Publications

Should you need to produce a book that is a licensed publication, you will need to add licensing notations to the front and back covers. Follow the specifications for the covers of non-licensed publications mentioned in the previous sections, and add the following:

Front Cover**Type sizes:**

Licensing Notation 9 point Helvetica

Placement:**Licensing Notation**

Baseline of the first line of licensing notation is 1 pica from the bottom of the VM symbol. Left edge of text is 15 picas from left page edge.

Back Cover**Type sizes:**

Licensing Notation 9 point Helvetica
Rule 0.5 point

Placement:**Licensing Notation**

First line of notation begins .4 picas from the baseline of the 0.5 point rule

Rule

0.5 point rule begins 5 picas from left page edge and measures 40 picas long. Top of rule begins 18 picas from baseline of 4 point rule that appears at the top of the page.

Spine

Perfect bound books (116 pages or more) will have a vertical title line, centered on the spine two inches from the top of the book. This text will be reversed out of PMS 415. The bar between your logo and the book title will then be printed in 100% of the same task color as the square in the VM symbol and rules on the covers.

Type sizes:

Book name	12 point Helvetica bold; name should include an abbreviated form of product title
Form number	9 point Helvetica medium
Logo	12 point

Placement:

Logo

Place your logo 12 picas from top of spine.

Task color bar

Place 2 picas from end of your logo; bar should be 3.6 picas long.

Book name

Place 1.4 picas from end of task color bar.

Form Number

Right edge of form number is 6 picas from bottom of spine.

Refer to Figure 12 on page 37 for spine text layout.

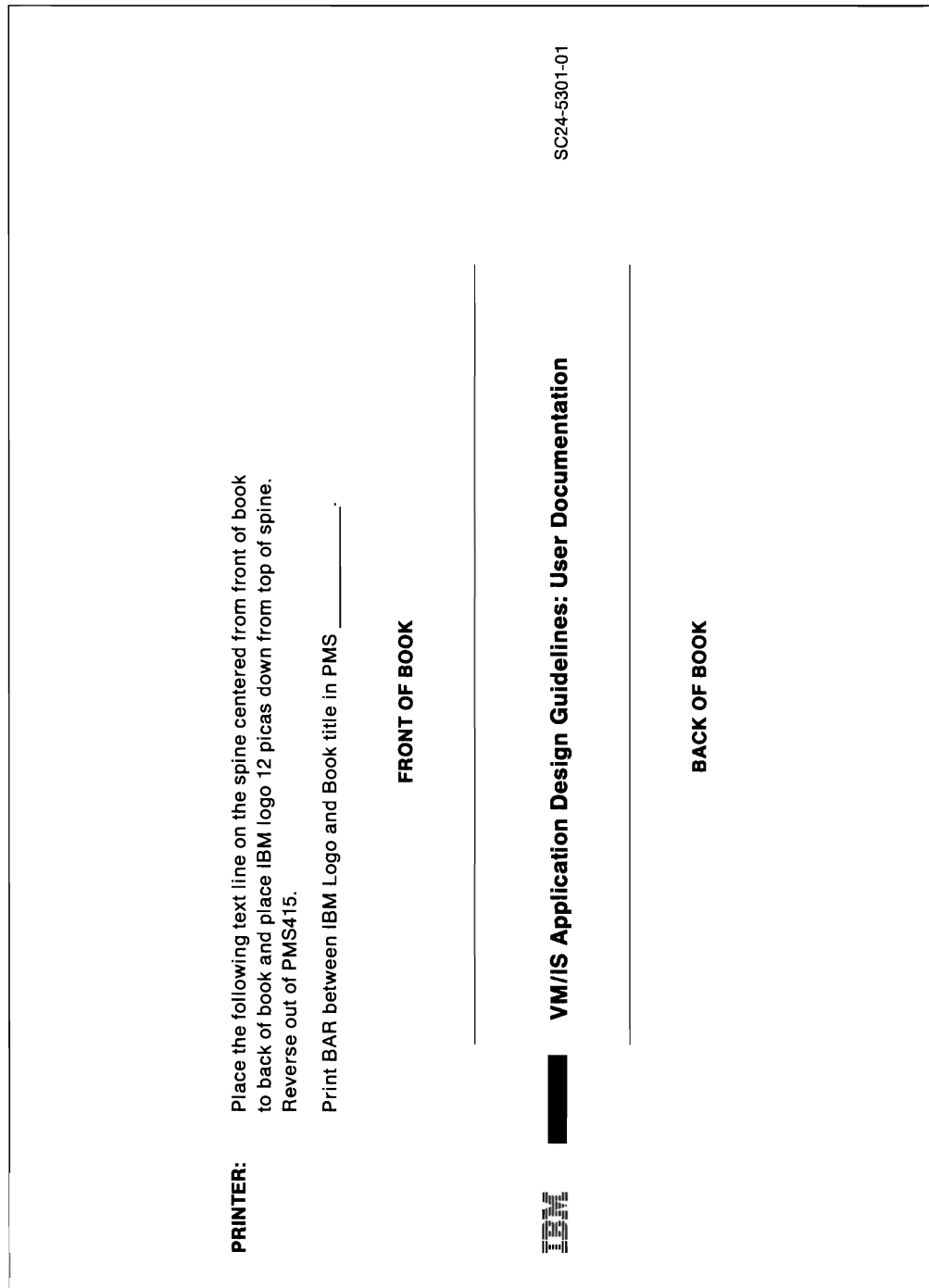


Figure 12. Spine Text for Non-Primer Manual

Title Page

A title page is required in separate-cover publications. However, a title page is not required in a self-covered book. A title page follows the front cover of a publication.

Color: All copy is black.

Layout: The title page contains the same information as the front cover and uses the same layout, with the exception of the VM symbol, which does not appear on the title page. Instead, two 0.5/4 point rules appear - one 18.5 picas from the top of the page and the second 5.5 picas from the bottom of the page. The 0.5 point rules begin 6 picas from the left edge of the page and measure 9 picas long. The 4 point rules begin 15 picas from the left edge of page and measure 31 picas long.

Refer to the title page in this book for title page layout.

Notices Page

The notices page is the back of the title page. Use this page for any notices, acknowledgements, and disclaimers.

The notices page is a bottom-oriented 40-pica column with no offset. The text should end 2 picas from the bottom of the page and be situated 5 picas from the left outboard. Note that all legal and safety notices should be in the base font.

Front Matter

Front matter consists of:

- Preface
- Table of contents
- Figure list (optional).

Preface

The format for a Preface is a 40-pica column with a 9-pica offset. The word “Preface” should be treated as a Head 1 with no offset. See “Body - Format” for the Head 1 font.

Table of Contents

Layout: The format for a table of contents is a 40-pica column with a 9-pica offset. The word “Contents” should be treated as a Head 1 with no offset. See “Body - Format” for the Head 1 font. **Leader dots** and sequential page numbering should be used in the table of contents.

Figure List

It is recommended that a list of figures, if appropriate for the book, begin on the first right-hand page after the table of contents.

Layout: The format for a figure list is a 40-pica column with a 9-pica offset. The word “Figures” should be treated as a Head 1. Each entry in the list should consist of a figure number, followed by a period, two character blanks, the figure caption, a row of leader dots, and the page number of the figure.

Body - Format

Offset style format is preferred, though a double-column format should be used for message manuals.

The suggested leading in most instances is two points greater than font size.

The offset style format is a single 40-pica column offset 9 picas. The following are also standard:

- Folios - Both left and right outboards
 - 2 picas from bottom of page
 - 5 picas from outboard
- Page Length
 - 6.5 picas from top of page to bottom of first line of text
 - 56 picas from top of first line of text to bottom of last line of text
 - 66 picas from top of page to bottom of page
 - Head 0 : 8 picas from top of page
 - Head 1 : 8 picas from top of page
- Fonts
 - Normal text can be 10 point Monotype Times New Roman⁹ (hereafter referred to as Times Roman)
 - User entries and display screen text are in 8 point ISIL Gothic (A monofont should be used.). This font may be scaled to 6, 8, 9, 10, 11 and 12 point.
 - Folios are in 9 point Times Roman
 - Page numbers are in 12 point Times Roman bold
 - The heads are as follows:
 - Head 0 : 18 point Helvetica bold
 - Head 1 : 18 point Helvetica bold
 - Head 2 : 16 point Helvetica bold
 - Head 3 : 14 point Helvetica bold
 - Head 4 : 12 point Helvetica bold
 - Head 5 : 10 point Helvetica bold
 - Head 6 : 10 point Helvetica italic
- Rules above Heads
 - Rules are placed above heads 0, 1, and 2 as follows:
 - Head 0: 3 point rule; rule length is 40 picas. Top of rule begins 6 picas from top of page. Top of head 0 text begins 0.6 picas from top of rule.
 - Head 1: 3 point rule; rule length is equal to head length (If head has multiple lines of text, rule length is 40 picas). Top of rule begins 6 picas from top of page. Top of head 1 text begins 0.6 picas from top of rule.
 - Head 2: 0.5 point rule; rule length is 40 picas. If the head 2 falls at the top of a page, top of rule begins 6 picas from top of page. If the head 2 falls anywhere else on a page, top of rule begins 2 picas from previous text. Top of head 2 text begins 0.4 picas from top of rule.

⁹ **Monotype Times New Roman** is a registered trademark of The Monotype Corporation, Limited; the (United Kingdom Corporation); Salfords, Redhill, Surrey, England

- Placement of Head Levels
 - The six head levels are placed as follows:
 - Head 0: Flush right on right-hand page
 - Head 1: Flush left with margin on right-hand page
 - Head 2: Flush left with margin
 - Head 3: Flush left with margin
 - Head 4: Flush left with margin
 - Head 5: Set in-line with text, followed by a colon
 - Head 6: Set in-line with text, followed by a colon

Additional Body Specifications

Format

In addition to the specifications found in the previous section, end-user manuals have the following specifications:

- Color
 - Entries keyed in by the user should be printed in 100% PMS 285 (blue).
 - System responses should have a 10% black 133 line screen over black text.
 - Terminal screens should have a 10% black 133 line screen over black text. The border of the screen should be removed.
 - Balance of publication should be printed in black.
- Running heads
 - Running heads are outboard on both pages of a spread.
 - Running heads should begin on the first page of each chapter and they should appear on both odd and even pages throughout each chapter.
 - Running heads should be the text of the Head 1 or an abbreviated version. In command sections, the command name should be the running head.
 - Running heads should start at Chapter 1 of the book and end before the back matter or appendix, whichever occurs first.
 - Running heads should be printed in black.

Back Matter

Back matter consists of:

- Summary of Changes
- Glossary of Terms and Abbreviations
- Bibliography
- Index.

Summary of Changes

The Summary of Changes is the first page of the back matter.

Layout: The words “Summary of Changes” are treated as a Head 1. The format is a 40-pica column with a 9-pica offset. Text is 9 point Times Roman on 11 point leading.

Glossary of Terms and Abbreviations

- Terms appearing in a book’s glossary are highlighted the first time they appear in the text, for example, in bold.
- If the product’s library contains a master glossary, entries appearing in the glossary of an individual book must be the same as the master glossary entries.
- If the product’s library contains a master glossary, then each book in the library should mention this master glossary’s title. This reference should appear in the beginning of the book’s glossary.

Layout: The words “Glossary of Terms and Abbreviations” are treated as a Head 1. The format for the glossary is two 19-pica columns with a 2-pica gutter. Terms are in 9 point Times Roman bold; text is in 9 point Times Roman on 11 point leading. Terms are followed by a period, two character spaces, and the text. There are 22 points between glossary terms.

Bibliography

Layout: The word “Bibliography” is treated as a Head 1. The format for the bibliography is a 40-pica column with a 9-pica offset. Text is 9 point Times Roman on 11 point leading.

Index

- Each page of the index section is identified by a bleeding square. Refer to “Graphic Information Retrieval Mechanisms” on page 42 for specifics of size and color.

Layout: The word “Index” is treated as a Head 1. The format for the index is two 19-pica columns with a 2-pica gutter. Index group separators are 16 point Times Roman bold. Text is 9 point Times Roman on 11 point leading. Secondary entries are offset 1 pica. Tertiary entries are offset 2 picas.

Refer to the index in this book on page 49 for index layout.

Inside Back Cover

An inside back cover is not required in separate-cover publications or self-covered publications; however, it complements the title page of separate-cover publications. An inside back cover follows the last page of the back matter material in a publication.

Color: All copy is black.

Layout: The inside back cover contains the same information and follows the same layout as the back cover, with the exception of the bar code, which does not appear on the inside back cover.

Refer to the inside back cover in this publication for inside back cover layout.

Miscellaneous

Paper: Except for front and back covers, 50-pound and 60-pound paper is standard. For Logic books and books with more than 350 pages, 50-pound paper is standard. For all other books, 60-pound paper is standard.

Binding: Perfect or saddle-wire binding is standard; trimming on four sides and shrink wrapping are optional.

1. A perfect binding is standard for books with a minimum of 116 pages.
2. A saddle-wire binding is standard for books with a maximum of 112 pages.

Trim size: 8-1/2 x 11 inches (width and height).

Drilling: Five-hole drilling is standard for all manuals.

Camera-ready Copy

Production of camera-ready copy by a device like the IBM 4250/II ElectroCompositor is preferred.

Graphic Information Retrieval Mechanisms

There are many ways of making it easier for readers to find information in a book. Here are a few suggestions.

Bleeding Square

A bleeding square is a square 3.6 picas high printed along the outboard edge of a page. The bottom of the square is placed 10.6 picas from the bottom of the page. It is printed in 40% black with a 133 line screen. This technique is used to mark each index page in a book. It makes the index pages easier to find.

Refer to the index in this book on page 49 for a sample index with bleeding squares.

Running Head

A running head is used to identify different parts of a book. It is usually an abbreviated version of a section or chapter heading.

Refer to the running heads throughout the chapters in this book for sample running heads.

Message Information

Organization

Message information for individual products must be organized to allow its merger with VM message information and the message information of other products.

The unique message identifiers used by each product permit the customer to arrange the information in a way that best suits the installation. However, information developers must organize the information in a way that makes it physically possible for the customer to do so. The following approach will enable the customer to easily remove product message information:

- If the product messages are not published in a separate manual, present the message information as a separate section or chapter of the manual in which it appears.

- If a product issues messages having more than one unique identifier, start each unique group of messages on a new page.
- Keep return code and other information associated with a unique group of messages with that group instead of collecting it, for example, in a common appendix.

Message documentation is formatted as in the following examples:

1111E **No routines specified in the CSL control files**

Explanation: The library created with CSLGEN must contain at least one routine. Each routine must be specified with a ROUTINE keyword in a CSL control file.

System Action: RC = 28. CSLGEN terminates.

User Response: Make sure one of your CSL control files specifies at least one routine with a ROUTINE keyword.

User Response: None.

1136W **Library *libname* not found**

Explanation: The indicated library was specified on a RTNLOAD command, but it couldn't be found from the search order.

System Action: RC = 28.

User Response: First check to see that the library name was spelled correctly. If so, check to see that the directory containing the library was accessed and check to see if the library was created with a CSLGEN command.

1119I **Processing [POOLDEF | CONTROL] file control statement: *control statement***

Explanation: The current control statement was displayed prior to processing.

System Action: None.

Summary of Changes

Summary of Changes for SC24-5301-01 for VM/IS 5.1

- The specifications for primer-type and non-primer type manuals have changed extensively to accommodate a different text processor. These changes affect the format of both types of books, including layout and fonts.
- Other changes affect non-primer manuals:
 - Color applications
 - Task color shades for the VM symbol and rules on front and back covers vary from primer manuals.
 - Color usage throughout manuals has changed, both the shade of color and where it is used.
 - Tracking symbols are no longer used in non-primer manuals.
 - Message documentation is printed in two-column format instead of offset style.
- Editorial changes have been made throughout this book to clarify the text.

Glossary of Terms and Abbreviations

cast coated. Coated paper dried under pressure against a polished cylinder to produce a high-gloss enamel finish.

folio. The page number.

font. All the letters and characters in one size of a typeface.

gutter. The inside margin of a page at the binding, from printing area to binding; also, the space between columns.

leader dots. Rows of dots used to guide the eye across the page.

leading. The amount of space between lines of type (always expressed in points).

pica. Printer's unit of measurement; approximately 1/6 of an inch.

point. Printer's unit of measurement; used primarily for designating type sizes. There are 12 points to a pica; approximately 72 points to an inch.

rule. A solid line, of varying length and width, used for a variety of typographic effects. (e.g., to set off heading levels)

running head. A title repeated at the top of each page of a book. Generally, the running head is a chapter title or a command name. (See also tracking symbol)

saddle-wire. To bind (or fasten) a booklet by wiring it through the middle fold of the sheets.

spine. The back of a bound book connecting the two covers.

spread. The left (even) and right (odd) pages together.

tracking symbol. Graphic device which is used to visually organize various books, components, or parts of a book. (e.g., the use of color, icons, or running heads)

varnish. A thin, protective coating applied to a printed sheet for protection or appearance.

Wire-O binding. A binding of continuous double series of wire loops run through punched slots along the binding side of a booklet.

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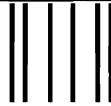
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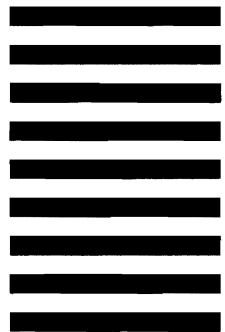
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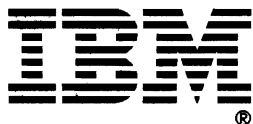
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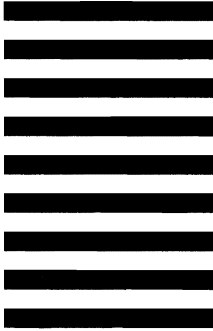
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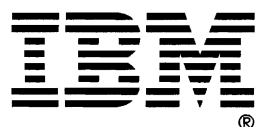
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