

# IFN CONDITIONAL TEXT FOR WORD – USER GUIDE

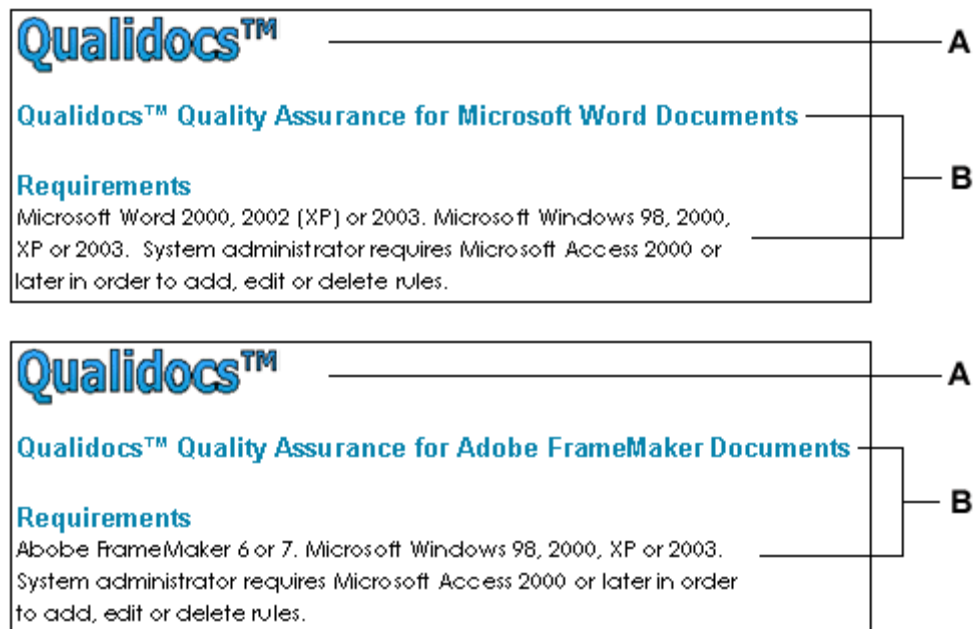
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## About conditional text

Conditional text is text that differs from one version of a document to another. Unconditional text is common to all versions of the document.

You can make any unit of text conditional, from one character to entire sections. For example, graphics, list items, index entries, tables, table rows, cross-references, footnotes, and table rows can be conditional. You make an item conditional by applying condition tags.

Text may be conditional in the body of the document, footnote text, headers/footers, and call-out text.

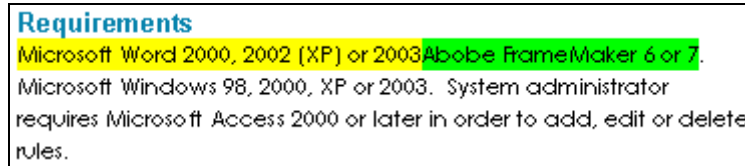


**Two versions of a data sheet** Conditional text can be used to create two data sheets in one document. The text and graphics common to both data sheets are unconditional. The text and graphics that appear in only one data sheet are assigned a condition tag that identifies the data sheet.

A. Unconditional graphics and text.

B. The title and first paragraph contain both conditional and unconditional information.

You can change the appearance of conditional text so that it's easy to identify by using *condition indicators* – highlighting with various colors.



*Condition indicators identify two conditions*

You can view and print conditional text in several ways. For example, you can view all versions of the document or hide selected versions, or you can show or hide condition indicators. Whatever you display appears in the printed document.

## Planning conditional documents

When planning a conditional document, you should examine the nature of the material and, because others may have to work in or maintain a conditional document you create, look at how several people can take turns working with it. Plan to treat conditional material consistently to make the document easier to use and maintain. Others will need to know the conventions you followed as you applied condition tags.

Use the following guidelines when planning a conditional text project:

- Number of versions
- Number of condition tags required
- Organization of content
- Graphics
- Tagging strategy
- Multiple authors

### Number of versions

Define how many versions your finished project will contain. For example, if you're creating a manual that describes a program that runs on both Windows and UNIX platforms, you might want to be able to produce at least two versions: a Windows version and a UNIX version. If you want to produce these versions with editorial comments sprinkled in the text during the review process, you'll want even more versions: UNIX with comments, UNIX without comments, Windows with comments, and Windows without comments.

## **Number of condition tags required**

Decide how many condition tags you need to produce the desired versions. A version of a document is defined by a unique set of condition tags. For example, a version of a finished Windows manual might be defined by having a Windows condition tag showing, a UNIX condition tag hidden, and a Comments condition tag hidden. In this example, you would need to decide whether to use one condition tag for Windows comments and another for UNIX comments, or whether to use a single condition tag for both Windows and UNIX comments.

## **Organization of content**

Evaluate the extent to which the document can be conditional and how you can organize the material to simplify development and maintenance. For example, you might be able to organize a book so that conditional text is limited to a few documents. Or you might choose to keep versions of a particular chapter in separate files rather than in conditional text, and then use a different book file for each version of the book.

## **Graphics**

If a document will contain linked graphics, consider creating separate folders for the graphics in each version. This simplifies file management when you need to copy or archive a version of the document with its graphics files.

## **Tagging strategy**

Determine the smallest unit of conditional text. For example, if a conditional document will be translated to another language, a whole sentence should be the smallest amount of text you make conditional. Because word order often changes during translation, using conditional text for part of a sentence could complicate translation.

Decide whether to make spaces and punctuation conditional. If conditional text begins or ends with punctuation, make the punctuation conditional too. This makes the text easier to read when you're viewing more than one version.

To avoid word spacing problems, such as having an unconditional space followed by a conditional space, set standards for handling spaces following conditional text (either always conditional or always unconditional).

Decide the order in which conditional text will appear and use this order throughout the document. The order can help subsequent authors maintain the document.

## **Multiple authors**

If a conditional document will have several authors, follow these guidelines:

- ❑ Plan document organization and work flow. For example, you may want to break a document into small files so several people can work on different parts of the document at the same time.
- ❑ Decide how you will provide explanatory notes to other authors. To help explain a conditional document, add helpful comments and define and apply a Comment condition tag to them.

## **Creating, changing, and deleting condition tags**

When you create condition tags, use condition indicators so that you can distinguish text in one version from text in another. If your conditional document will be used to create more than two versions, use color indicators.

### **To create or change a condition tag:**

1. Click the **Manage Tags** toolbar button.
2. Do one of the following:
  - ❑ If you're changing a condition tag's indicators, select the condition tag in the scroll list and click **View tag properties**, or double-click on the conditional tag in the scroll list.
  - ❑ If you're creating a condition tag, click **Add new tag**, enter a name in the **Tag name** box, and choose a highlight color to use as the conditional indicator. Try to use meaningful names.
3. Click **OK**.

- **Note:** Conditional text appears in a separate color when it is assigned two or more overlapping condition tags that use different colors as condition indicators. This overlap color may be defined using the **Options** dialog box.

### **To delete a condition tag from a document:**

1. Click the **Manage Tags** toolbar button.
2. Select the condition tag in the scroll list to be deleted and click **Delete tag**. Conditional Text for Word removes the condition tag from any text that uses it and deletes the tag from the Manage Tags dialog box.

## **Copying conditional tags between documents**

After you have created conditional tags in your document or template, you may copy those conditional tags into other documents or templates using the Tag Organizer.

1. Click the **Manage Tags** toolbar button.
2. Click the **Organizer** button. The name of the current document is shown on the left with the list of conditional tags.
3. Click the **Open File** button on the right side of the dialog box, and locate the document that you wish to copy conditional tags to or from. Click **Open**. The name of the document is displayed on the top right, and the list of conditional tags in the document is listed on the right.
4. Choose a conditional tag to move and click the **Copy** button to copy it to the other document.

## Applying and removing condition tags

To make text conditional, you apply tags by clicking the **Mark Selection** toolbar button and using the **Apply Conditional Text** dialog box.

### To apply a condition tag to an item:

1. Select the text or item you want to make conditional.
2. Click the **Mark Selection** toolbar button. The **Apply Conditional Text** dialog box shows the condition tags of the selected text.
3. Move the condition tags to the appropriate scroll lists by doing the following:
  - To move a condition tag between scroll lists, select the tag and click an arrow, or double-click the tag.
  - To move all tags from one scroll list to another, select a tag in the list and click an arrow.

To include text in a condition, move the condition tag to the **In** scroll list. To exclude text from a condition, move the condition tag to the **Not In** scroll list. Condition tags in the **As Is** scroll list will not be applied or removed.

4. Click **Apply**. If text is selected, Conditional Text for Word applies the settings to the text.

If you apply a condition tag that's currently hidden, the selected text disappears unless it's also tagged with a condition that is showing. For information on viewing hidden text, see *Changing the view of conditional documents*.

## Removing condition tags from an item

Removing a condition tag from an item is different from deleting a tag from a document. When you remove a tag from an item, the tag remains in the document so it can be applied again later. When you delete a tag from the document (see *Creating, changing, and deleting*

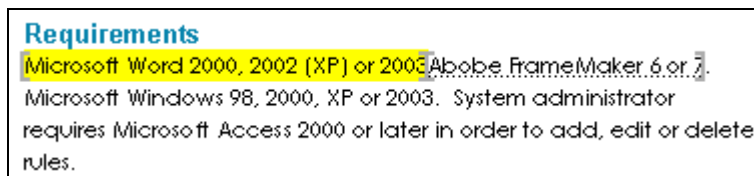
*condition tags*), Conditional Text for Word removes the condition tag from any text that uses it and deletes the tag from the **Manage Tags** dialog box.

To remove a condition tag from an item:

1. Select the item with the tag you want to remove and click the **Mark Selection** toolbar button.
2. Do one of the following:
  - To remove some condition tags but leave the text conditional, move the condition tags you want to remove to the **Not In** scroll list. (To move a condition tag between scroll lists, select the tag and click an arrow or double-click the tag.)
  - To remove all condition tags and make the text unconditional, click **Unconditional**.
3. Click **Apply**.

## Working in conditional documents

You can view or print all unconditional and conditional text simultaneously, or you can hide the conditional text of one or more versions. Conditional Text for Word ignores hidden conditional text when formatting a document. When hidden text is visible, hidden conditional text is displayed on-screen with a dotted underline. When bookmarks are visible, bookmarks surrounding conditional text are displayed on screen as grey square-brackets.



*Dotted-underlined text shows where conditional text is hidden*  
*Square-brackets show bookmarks*

## Changing the view of conditional documents

A conditional document can display any number of conditions at a time and can have any of its condition indicators on or off. For example, you can change the view to display the condition tags for one particular version, for several versions, or for all versions. If you're displaying more than one version, or if you're showing one version and want to see which part is conditional, you may want the condition indicators on.

To change the view of a conditional document:

1. To change the view of a conditional document, click the **Show/Hide Conditional Text** toolbar button.

2. Specify the condition tags of the text you want to show. To move a condition tag between scroll lists, select the tag and click an arrow, or double-click the tag.
3. Indicate whether you want to display condition indicators and click **Apply**. When text has more than one condition tag, the text will be visible if any of its tags are in the **Show** scroll list.

## Numbered list items

When conditional numbered list items are hidden, automatic list numbering in each item is deactivated, so that numbering is not skipped in the list items that are still displayed. When the hidden list items are displayed, automatic numbering is reapplied.

To disable this feature, uncheck the "Advanced list handling" checkbox in the **Options** dialog box.

- **Note:** When "Automatically update document styles" is checked in the **Templates and Add-ins** dialog, "Advanced list handling" is disabled.

## Fields

When conditional text containing index entries, TOC/TOA entries, or sequence fields is hidden, these fields are deactivated so that the hidden index, TOC and TOA entries are not considered in the index or tables of contents, and so that hidden automatic sequence numbering (often used for table and figure numbering) will be skipped. When the hidden conditional text is redisplayed, the fields are reactivated.

The following fields are deactivated when hidden and reactivated when displayed: XE, TC, TA, SEQ and RD.

To disable this feature, uncheck the "Advanced field handling" checkbox in the **Options** dialog box.

## Editing conditional text

When you work in a document, conditional hidden text is generally ignored. This means, for example, that index and sequenced fields are ignored, and list items are skipped. However, you can cut, copy, and paste hidden text by selecting the text before and after a conditional text bookmark and by using the commands on the Edit menu.

Work with bookmarks turned on when you are working in a conditional document. Conditional text bookmarks alert you to text that is in other versions of the document.

When editing numbered or bulleted lists that have items that are conditional, it is highly recommended to show all conditional text (see *Changing the view of conditional documents*) before adding, deleting or moving list items.

## To edit conditional text:


Use the Edit menu commands as usual.

- **Note:** When you copy text, Conditional Text for Word **does not** copy its conditional text bookmarks and condition tag settings. However, when you cut and paste text, Conditional Text for Word **does** transfer its conditional text bookmarks and condition tag settings.

## To spell-check or search through all text:

Show all conditional text (see *Changing the view of conditional documents*) before checking spelling.

## Finding conditional text

You can search for text tagged with a visible condition tag. If you want to search all text, regardless of which condition tags are visible, first click the Show/Hide toolbar button  to view all hidden text.

## Finalizing conditional documents

Before you produce a version of a conditional document, follow these guidelines:

- Change your view of the document to include only the version you want to print, and turn off condition indicators.
- If your document contains document properties, make sure the property definitions are correct for the version you're printing.
- Spell-check the document. This will catch double spaces and punctuation problems caused by incorrectly tagged conditional text.
- Update fields, including the table of contents and index, to make sure that hidden index entries, headings, sequences, etc. are not considered in the conditional document.
- Create a copy of the document for each version before manually adjusting line and page breaks. Use the copy for each version for making the adjustments and for printing. These adjustments will differ with each version. Use the original document for future edits.

## Publishing conditional documents

To publish a conditional version of the document with only chosen conditions included:

1. Click the **Publish Document** toolbar button.



2. Specify the condition tags of the text you want to appear in the published copy. To move a condition tag between scroll lists, select the tag and click an arrow, or double-click the tag. When text has more than one condition tag applied, the text will be included if any of its tags are in the **Publish** scroll list.
3. Click **Publish** or **Publish and Open**. You will be prompted to choose a name for the new document. After clicking **OK** the published document is saved. If you clicked **Publish and Open**, then the new document will remain open in Word.

When the conditional version is published, all conditional tags, bookmarks and conditional indicators are removed.