

Style Guide for Print and Online Documentation

When a team works together on documentation projects, it is vital that they share a consistent set of guidelines that allows their products to appear seamless. These guidelines list specific linguistic, style, and formatting requirements and suggestions so that the entire document meets audience needs, and is consistent from beginning to end.

This style guide is composed of three sections:

- *Formatting Guidelines* - contains the formatting requirements and suggestions that we consider most important.
- *Navigation Guidelines* – contains guidelines for navigation issues in both print and online documents.
- *Language Conventions* - contains guidelines for word and phrase usage and specific grammar and punctuation issues as they pertain to the specific needs of our team.

For general grammar issues, we defer to three style guides:

- Strunk and White's *Elements of Style* (www.bartleby.com)
- *The Chicago Manual of Style*
- *Read Me First! A Style Guide for the Computer Industry* (Sun Technical Publications)

This style guide addresses style issues for both print and online documentation. The guidelines for print assume that the document will be written in Word or FrameMaker. Those for online documentation assume that the help files are written using RoboHELP and that the help files are part of a help system, not a web page.

This guide's main objective is to create consistency within the current and future documentation projects. As projects advance, the team style is likely to evolve. We fully expect that future revisions will likely fine tune, expand on, or completely replace guidelines we have set down here. To remain current, we recommend consulting the most up-to-date version of the style guide.

Formatting Guidelines

This section of the style guide includes formatting specifications for the following aspects of all documents:

- Page setup
- Typography
- Paragraphs and chunking
- Visual elements

Page Setup

Margins, Text Alignment, and Spacing

- Adhere to one consistent setting for margins: Left Margin: 1" / Right Margin: 1"

- Left justify text with the exception of graphics captions.
- Be consistent with line spacing throughout the document (i.e. single spacing).

Headers and Footers

- Every page has a header that shows the corporate identity.
- Print documents include title and page number.
- Online documents include a title but no page numbers.
- Headers and footers are consistent throughout the document in terms of placement, typography, and naming conventions. For example, if the running header in chapter 1 is "1," then the running header in chapter 2 should be "2," not "Chapter 2".

Typography

Body Text

Body Font Size

Point size should be 11 or 12. One font should be used for body and should be consistent throughout. Team members should choose the font before work begins on the documents.

- For print: Use a serif font such as Book Antiqua or Times New Roman.
- For online: Use a sans serif font such as Arial, Helvetica, Century Gothic, or Verdana.

Font Style and Weight

- Bold: Use only for headings unless using Microsoft conventions such as bold screen names and buttons.
- Italic: Use for foreign language words and to emphasize a non-heading word or phrase.
- Underline: Use when creating a hyperlink.
- All Capitals: Use only when describing a screen or a specific table/chart or specific procedure.

Font Color

For best contrast use black text on a white except for online hyperlinks. Any links should be either blue or green. Blue would be used in Word or FrameMaker documents while green would be used in the RoboHELP help files.

Headings

Heading Levels

Heading levels should be clearly defined early in the project and used consistently. Arial is the designated font. Make sure each heading level is properly marked and that the style for each heading is consistent with standard design principles. For example:

- **Heading 1:** Arial, 16pt, Bold
- **Heading 2:** Arial, 14pt, Bold
- **Heading 3:** Arial, 12p, Bold

- Heading 4: Arial, 11p, Normal

Heading Alignment

All headings should be aligned flush left.

Paragraphs and Chunking

A paragraph consists of one to five sentences describing a single topic or idea. It begins with a sentence that signals the theme of the paragraph and is followed by sentences that support the theme and are clearly related to each other.

A paragraph should be aligned flush left and be separated from preceding and following paragraphs by an extra line of spacing.

Lists

Items in a list should be parallel in construction. The first word in each item is capitalized and complete sentences are punctuated with a period.

Numbered

- Use numbered lists only when describing a step-by-step procedure
- Use the following example for creating numbered lists. For hierarchical numbered lists, use lower case letters for the sub-list.

Example:

1.
 - a.
 - b.
- 2.
- 3.

Bulleted

- All other lists that consist of two or more items should be bulleted, using a simple dingbat such as a dot or a small square.
- For nested lists, indent the sub-list consistently, and use a different bullet style.
- Bulleted lists should be uniform in terms of indentation (regular and hanging) and spacing between each point.
- The first word in each bulleted item should be capitalized unless the listed items complete the thought in the introductory sentence.

Procedures

A brief introduction of the task and how it impacts the rest of the system or other procedures should precede procedures. This introduction should be only two or three sentences long, just enough so the user will not be confused by the procedure.

Procedures should consist of a list of numbered steps where each step represents the next essential task in the sequence. The list should be preceded by a phrase that describes the task

about to be completed. For example, a procedure for turning on a computer, could include the following:

Turning on your computer is the first step to learning about your computer, the software you have installed, and the other features that come with your machine. You must turn your computer on before you can access any of these features.

To turn on your computer:

1. *Turn on your monitor*
2. *Push the power button on the hard drive of the computer.*

Visual Elements

- A visual focuses on a single idea, conveying it sharply and purposefully. All extraneous information should be eliminated.
- A caption states what the visual is about, and what the reader should learn from it. This caption should be a short sentence.
- The text introduces a visual before it appears in the document.
- A visual should be placed as close as possible to its introduction without impeding the general flow of the text.
- A visual should be centered on the page with the caption centered directly below.
- There should also be a figure number below the visual, but above the visual's caption.

Tables

Tables allow for very organized displays of precise data in tabular form. The number and size of cells and rows varies depending on the purpose of the table.

- Present information in rows and columns.
- Layout of tables and charts should be consistent in appearance and style.
- Headings for rows and columns should be consistent in font, size, and style.
- Align and justify contents within cells and rows consistently.
- Use lines or white space to separate headings from data and rows from columns.
- Align decimals vertically within columns.
- Use abbreviations where space is limited.
- Identify the table with a figure number.

Icons

There are several definitions for icons. In this style guide, icons refer to graphics on buttons or screens that help define how that button or screen is used. Icons can be used within text to help illustrate a procedure or concept by showing the actual button that the user should click or access.

Other Visuals

Using other types of visuals appropriately can make the documentation clearer and easier to understand.

- *Charts* depict relationships between two or more variables, illustrate the flow and relationship of steps in a process, display organizational relationships, or identify the relationship of parts to a whole.
- *Graphs* depict the relationship of two or more variables and show how they change.
- *Photographs* and *screenshots* convey realism and show readers exactly how a screen, button, or dialog box appears to the user.
- *Illustrations* and *diagrams* show conceptual objects, providing perspectives on existing objects or assemblies that photographs cannot capture.

In general, be consistent in the use of all visuals.

- Use a horizontal orientation for all letters, numbers, words, and phrases in headings, legends, and label.
- Place footnotes and source information below the visual.
- Identify the chart or illustration with a figure number.
- Provide a perspective to facilitate reader understanding.
- Label all pertinent elements in the illustration.
- Illustrate a process from top to bottom and left to right.
- Identify scale, perspective, and orientation in all illustrations.

Navigation for Online Documents

This section assumes that online documents consist of online help files only, not web pages or web tutorials, created in RoboHELP.

Navigation should consist of the following:

- Table of contents
- Index
- Browsing sequence
- Series of links that address major concepts or definitions and also act as a secondary table of contents, so the user can navigate to other important topics from the various screens.

Language Conventions

This section addresses language and wording for print and online documents. Topics include:

- Abbreviations
- Acronyms
- Capitalization
- Gender related language
- Grammar and word use
- Punctuation

When beginning a new document, the team should develop a “style grid” to track language conventions specific to the document.

Abbreviations

In general, avoid abbreviations unless you are sure all your readers will understand them. When using an abbreviation, follow these guidelines:

- Spell out an abbreviation the first time it appears and include the abbreviation in parentheses after the full version.
- Consider spelling the abbreviation out more than once if you use it in a long help topic that requires scrolling.
- Form plurals of abbreviations by adding an “s” (lowercase) and no apostrophe (unless there are internal periods).

Acronyms

Avoid acronyms whenever possible. They can tend to be confusing for the reader. If you must use an acronym, adhere to the following list of guidelines:

- Spell out at the first occurrence of each acronym for both printed and online documents. For online documents, spell out the acronym more than once if the topic is long and the page requires scrolling.
- Spell out the acronym unless:
 - Your audience knows it, such as common Internet or computer acronyms.
 - The definition doesn’t contribute anything to understanding the term.
 - It is a product name, for example “OS/2”.
- Explain the acronym and its significance if it is central to the current topic or section.
- Avoid using acronyms in headings. If the acronym does occur in a heading, spell out the phrase.
- Add an ‘s’ without an apostrophe for plural acronyms.
- Use an apostrophe if the acronym is to be used as a verb, for example “ftp’d”.

Capitalization

In general, capitalize the following:

- Letters of most abbreviations and acronyms
- First letter of entries in unnumbered (bulleted) lists
- First letter of “table,” “chapter,” when followed by a number
- First word of a complete sentence following a colon
- The second element of a hyphenated compound in a title or heading, only if it is a noun or proper adjective, or has equal force to the first element.

Gender Related Language

Try to be gender neutral in language.

- Use “you” when describing a concept or screen.
- Example: This screen allows you to run this special procedure.
- Avoid pronouns in the actual steps of a procedure.
- Example: Instead of saying “You can click on this”, say “Click on this.”
- Use titles (manager, employee).
- Use plural pronouns, “they” rather than “she” or “he”, but make certain that nouns and verbs appropriately pluralized.

- Avoid “she/he.”

Grammar and Word Use

- Use the active voice as much as possible.
- Use the passive voice only to avoid placing blame or when subject is unknown.
- Use “to be” verbs sparingly.
- Keep sentences short so that international audiences can understand content.
- Avoid talking about the structure of the document rather than the subject. For example, avoid sentences beginning with “Here is” “Note” or “There is.”

Which/That

- Use “that” in a restrictive clause (needed for a sentence to make sense).
- Use “which” in a non-restrictive clause (not needed for sentences to make sense)
- If you use “which”, separate the phrase from the main sentence with a comma.

Who/Whom vs. That

- “Who” refers to people.
- “Whom” is a direct object.

Numbers

- Write out numbers 1-10 as words; use numerals above 10.
- Write related numbers in the same sentence as numbers, even if some are ten or less.
- Use numerals with a.m./p.m. but not with o’clock.
- Write out the first occurrence of a consecutive number series as a numeral and the second as a word.
- Write a fraction as a decimal preceded by a zero whenever possible.
- Write out dates, for example, June 1, 1999.
- Be aware of international audiences. Different countries write large numbers differently (using commas or space).

Word Choices

Consult the Merriam-Webster Dictionary available online at <www.m-w.com/dictionary>.

- Use the correct word, disk vs. disc – “Disk” refers to magnetic storage medium such as a floppy disk. “Disc” refers to an optical storage medium such as a CD-ROM.
- Avoid using colloquialisms such as “missing the boat” or “make or break”.
- Use “read” rather than “view”.
- Spell out abbreviation. Use “so forth,” “such as,” and “for example” rather than “etc.” “i.e.” or “e.g.”
- Verify copyright, trademarks, and other proprietary language.

Buzzwords

Avoid using buzzwords whenever possible. Exercise judgment when faced with a buzzword. If it will add to the document without sounding annoying or cliché, then use it. Otherwise, avoid it. Sometimes, a buzzword is technical jargon. If there is no good substitute, then use the word. Examples of buzzwords:

cyber	hot
cool	implementation
current	information superhighway
describes	lots
demo	lurk
full of resources	neat
functionality	newbie
documents	ultimate
hits	up and running
home page	under construction

Internet

- Always use an initial capital.
- Always precede it with “the” unless it is being used as a modifier.
- Use “internet” (lower case) when referring to a collection of networks that functions as a single large virtual network.

Using Negatives

Avoid using negatives whenever possible. It is always preferable to phrase an idea in the positive form. For example, “did not have much confidence in” can be expressed as “distrusted”. “Not honest” can be replaced with “dishonest”. Examples of negatives include:

- Never
- No
- None
- Not
- Not different
- Not many
- Not the same
- Not unlike
- Not unless
- Not until
- Nothing

Punctuation

OverviewAn overview of general punctuation is summarized in the table below:

Punctuation	Guidelines
Apostrophe	Avoid contractions and possessives. Check whether you are expressing the plural or the possessive.
Colon	Use before a statement that explains or illustrates the preceding

	sentence. Use to introduce a list when the introductory sentence is complete.
Comma	Avoid overusing. They are difficult to see on a computer monitor.
Dashes	Use <i>em</i> dashes that are created by using two hyphens and no white space or the <i>em dash</i> symbol. Use dashes to surround interruptions. Use dashes to surround an appositive, a phrase that expands on a noun or noun phrase.
Hyphen	Use after a letter or number that modifies a noun (32-bit) Use to separate key combinations (Control-shift-3)
Parentheses	Avoid because they are difficult to see online and interrupt reading. If you must use them, use sparingly for definitions of acronyms or brief definitions.
Periods	Use at the end of list items unless they are short words or fragments. If a Web address (URL) is at the end of a sentence, include the period. Avoid periods after computer code or user input because readers may misunderstand exactly what to type.

Lists

Lists follow the guidelines below:

- Introduce a list with a sentence or phrase.
- Use a colon after the words “ as follows” or “the following”.
- Punctuated lists of incomplete sentence.
- Use a period at the end of list unless the list consists of short words or fragments.