



Standards for Writing InfoDev Documentation

STYLE GUIDE

for Information Developers

Reference Guide

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Use of Language and Punctuation

This chapter provides the language and punctuation standards for the documentation development used at Transcientive. Topics are listed in alphabetical order.

In this chapter, some items are listed as "incorrect" although they are actually grammatically correct. "Incorrect" in the context of this Style Guide means that it is not part of our style, or not our convention. When editing material from other groups, it is important to be sensitive to this difference.

C

colon

Comment: Use a colon after figure numbers, in figure captions, field views in the Field Descriptions sections, and when introducing a procedure in the Steps section.

Examples:

Figure 8: Print dialog box.

Plan ID: Type an identification reference, up to 20 characters. To install the Transferable Stock Option Module:

comma

Comment: Use commas in a series.

Example:

The list of optionees included Chris Keeling, Joan Thomas, and Laura Norton.

—or—

The list of optionees included Chris Keeling, Joan Thomas, and Laura Norton and Catherine Donroe.

Comment: Use commas in numbers.

Example:

1 to 999,999

conditionals

Comment: Do not use conditionals (would, could) in Procedures or Steps.

Example:

Incorrect: If you wanted to be able to use both systems, you would install both ED and EC... etc.

Correct: To use both systems, install ED and EC....etc.

Comment: You may, however, use conditionals in examples:

Correct: For example, to print a series of reports, you would select the range of reports and then type **Ctrl+P**.

D

dashes and hypens

Type	Use	Spaces
en dash	To indicate subtraction.	Yes
	To indicate a negative number.	No
	To indicate a range of pages	No
	In an “or” statement	No
em dash	As punctuation in text (sparingly)	No
hyphen	Between the parts of a compound word	No

Examples:

If the expiration date is “1 day less than a month, type –1”.

—or—

More than 2,500 companies—including 40 percent of the Fortune 500—use Transcentive products.

—or—

Express Options facilitates calculation of tax information for year-end reporting.

—or—

For additional information, see pages 23–29.

Chapter 2

Elements of Style

This chapter provides the elements of style standards for the document development at Transcentive. The topics are listed in alphabetical order.

In this chapter, there are some items listed as incorrect that are actually grammatically correct. "Incorrect" in the context of our Style Guide means that it is not part of our style, or not our convention. When editing material from other groups, it is important to be sensitive to this difference.

A

abbreviations

Comment: Use all Caps, without periods, to indicate the time.

Example:

- 8:00 PM
- EST

acronyms

Comment: Define its first instance. After that, use only the acronym.

Example:

Select a valid Social Security Number (SSN). Then you can sort the information based on the SSN field.

and/or

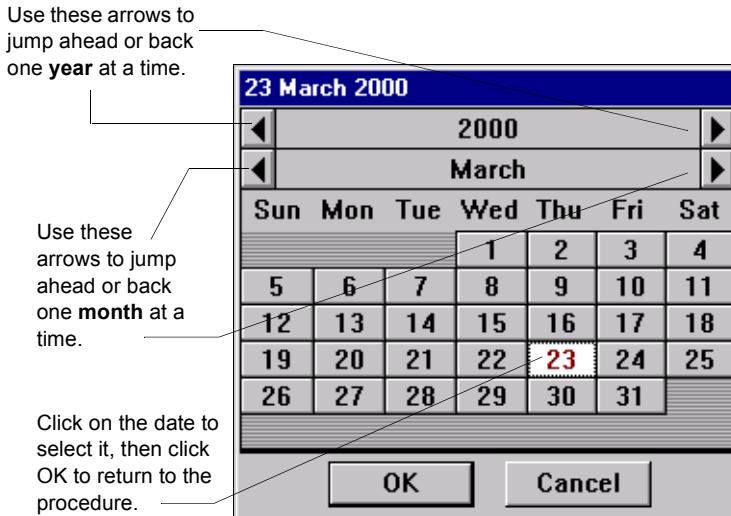
Comment: Minimize the use of and/or. Do not use a space on either side of the slash.

article in titles and bulleted lists

Comment: Minimize the use of articles as the first word in a title or bulleted list.

I would like to have
Bacon
Eggs
Hash browns
—not—
The bacon
The eggs
The hash browns

Example:



cross-references

Comment: You must refer to page numbers or chapter numbers when using cross-references in the conceptual text (introduction).

Example:

For more information about authorizing securities and establishing stock option plans, see Capital Authorizations, page 23.

Comment: When using cross-references in dialog box descriptions and Steps use only page numbers, in conditional text.

Example:

1. From the fifth Transfer Options dialog box, complete the following fields:

Fair Market Value

Volatility, Risk-free Rate

Life of the Option

Dividend/Yield

Valuation Method

For more information, see [page 6](#).

D

date format in dialog box description

Comment: If the product has a date field in mm/dd/yyyy format, use this style.

Incorrect: Type the date that the plan was officially adopted in mm/dd/yyyy format

Correct: Type the date (mm/dd/yyyy) that the plan was officially adopted.

date of approval

Comment: When referring to the date of approval, use on which. Do not use when or that.

Example:

Incorrect: Type or edit the date when the shareholders approved the new stock class.

Incorrect: Type or edit the date that the shareholders approved the new stock class.

Correct: Type or edit the date on which the shareholders approved the new stock class.

dialog box

Comment: When you document a topic, refer to the initial dialog box as the main menu.

Example:

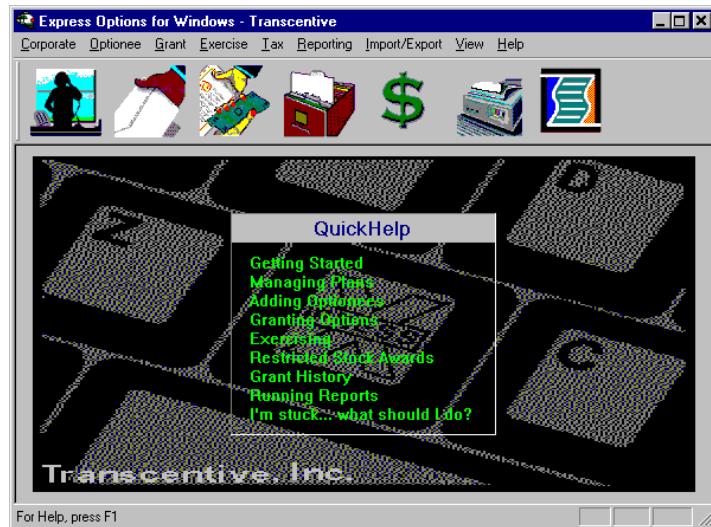


Figure 1: Main Menu

This chapter provides the preferred word list for the document development at Transcentive. The topics are listed in alphabetical order.

In this chapter, there are some items listed as incorrect that are actually grammatically correct. "Incorrect" in the context of our Style Guide means that it is not part of our style, or not our convention. When editing material from other groups, it is important to be sensitive to this difference.

A

about

Comment: Do not use **as to**.

access

Comment: Access is the term used to describe the right to enter and the means to enter an area of the system.

Example:

Transcentive provides the password to access the system at the time of purchase.

allows you to

Comment: Do not use **provides for** or **gives the capability to**.

Incorrect: The system provides for you to.....

Correct: The system allows you to.....

amount

Comment: Do not use **number**.

Example:

Type the amount in American dollars and press **Enter**... etc.

appear

Comment: Do not use **will be displayed**.

Incorrect: The following screen will be displayed:

Correct: The following screen will appear.

B

back up

Comment: This is a verb. Do not use as a noun.

Example:

Back up the system before importing the new data.

backup

Comment: This is a noun. Do not use as a verb.

Example:

It is important to have a recent backup if you want to avoid the risk of losing your data.

C

can

Comment: Do not use **you have the ability to**.

Incorrect: Once you enter the optionees, you have the ability to.....

Correct: Once you enter the optionees, you can.....

Chapter 4

The .25 Stuff.....(That you don't want to miss)

This chapter contains the \$.25 “do not use” word and phrase list for the documentation development at Transcutive. The topics are listed in alphabetical order. The use of these incorrect words can get to be quite expensive!

In this chapter, there are some items listed as incorrect that are actually grammatically correct. "Incorrect" in the context of our Style Guide means that it is not part of our style, or not our convention. When editing material from other groups, it is important to be sensitive to this difference.

A

amount

Comment: Use **number**.

Incorrect: Type the amount of users.....

Correct: Type the number of users.....

as follows

Comment: Do not use.

Incorrect: Enter the information from the database as follows:.....

Correct: Enter the information for the database:.....

as opposed to

Comment: Use instead of.

Incorrect: Click **Next** as opposed to **Ok**.

Correct: Click **Next** instead of **OK**. .

as to

Comment: Use on or about.

Chapter 5

Documenting a Topic

This chapter includes an outline of the basic structure used by Information Development to write User Guide documentation for a specific topic.

Prepare an outline for the User Guide.

Refer to this outline to see where the topic fits in the document. For example, an outline for Transfer Option Module might look like this:

- Overview of the Topic
 - What is a Transfer Option Module
- Installing the Module
 - How to get the software to work
- Transferring the Options
 - How do I actually get the "stuff" to move from the transferor to the transferee
- Adding / Modifying Transferees
 - What does this mean

Introduce and describe the topic in general.

Include the following:

- **What:** Define or describe the topic (not the software), e.g., define or describe a Transferable Option-- conceptually describe it in words.
- **When:** Tell when you would need to address this topic. e.g., under what circumstances would an optionee be able to transfer options
- **Why:** Why do we need to know about this topic? In the case of transfers there is more related information that users need to know. Short (one or two sentence) examples are good here.
- but not -
Where: Don't tell details about selecting items, check boxes, or buttons to push. Be general. Once again, keep it conceptual.
- **How:** Don't tell them how to do it yet... we'll do that in the procedure. Give them everything *else* they need to know. This may require a few sentences, or up to a few pages in the case of complex topics.

Introduce how the software handles the topic.

- Be general. Don't tell details.
- Don't tell them how to do it yet... we'll do that in the procedure.
- Be brief. Users need to know that they must set up the module before they can actually transfer the options. Once again, provide a general description followed by what you need to know about the system in order to address what you need to do with transferring options.

Provide a separate procedure.

- Prepare a procedure for each different task you might perform for the particular topic.
- For example, you might have a procedure for adding information and one for deleting information.
- There may be more than one dialog box involved in the process.
- You may have more than one procedure for a given dialog box. If there is something else we need to provide, add a second sentence or a note.
- The Steps are designated at the beginning of the topic. For an example, see page 4 of the Transfer Option Module.
- Just list the fields in which users must make entries. The actual entries are provided in the dialog box description area.
- Try to keep procedures shorter than ten (10) steps. Nobody wants to follow a 35-step procedure! If the procedure really is very long and involved, try to break it up into sub-procedures.
- Follow the steps with a screen shot and the dialog box descriptons.

Provide a Dialog Box Description.

Insert a dialog box and provide one sentence that describes it.

- Show a screen shot with data in the dialog box. Follow this screen shot with the dialog box descriptons.
- Provide dialog box descriptons for each of the fields on the dialog box. Tell what each field is for, and what you do there. There is no limit to the number of fields you list in the procedure.
- Present the information in the format of a procedure, so that users can just read-and-do. Refer to the dialog box descriptons in the Transfer Options Module for an example.
- When you provide the example, include screen shots with data.
 - This "case study" will be part of the online guide, but will not be included with the printed manual because of printing charges.

- This would be a "beginning to end" example, following an actual procedure through the entire process. We didn't actually do it for this particular module, since it was very short; however, you can always go to the Termination sample.