



MyCorp Technical Communications Style Guide

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MyCorp, Inc.

Post Office Box 826
San Leandro, CA 94577 USA
(01) 510-555-1234 (main phone)
(01) 510-555-4567 (fax)
(01) 510-555-0890 (support phone)

support@MyCorp.com

San Francisco, CA
Austin, TX
Atlanta, GA
Pittsburgh, PA
St Louis, MO
Wichita Falls, TX
Boston, MA

My Corp, Ltd.

Auckland, New Zealand
Perth, Australia
Sydney, Australia

My Corp GmbH

Frankfurt, Germany

My Corp Asia Pte Ltd.

Singapore

MyCorp Canada ULC

Vancouver, Canada

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www.Data-Doctor.Info

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Chapter 1

Overview

The purpose of this document is to define standards for formatting, grammar, and spelling in MyCorp technical manuals. This style guide helps developers, technical writers, and others who produce content, to produce and maintain documentation that is consistent and accessible and follows a common MyCorp corporate identify

Why We Document

Most documents serve multiple audiences, including users, developers, management, non-native speakers, and yourself. A professional, respectful tone is appropriate in all business communications. Tone is a function of many factors, including person, voice, and mood. Use the second person, active voice, and direct commands to create a business tone.

For Users

You may be writing for technical, industrial, or business users. The purpose of user documentation is to help users understand and use our products. To document effectively you should understand who the users are and what context they are working in. Ask yourself:

- What do the users already know?
- What more do they need to know? Do they need “how to” information or “what and why” information or both?
- Under what circumstances will they read what I write? Will they read while performing a task or before performing a task? Will they read to learn something, or will they read what I write as a reference?

Think of giving instructions like giving driving directions. You must know where the users’ starting point as well as their destination. It is usually best to tell the best way to get to the destination, but not every way to get there.

Because our business is global, we must consider the interest of non-native speakers who use translated versions of our documentation.

Strive for clarity and conciseness in all communications.

Resources

This style guide is a complement to existing resources that can help you to document more effectively.

Documentation Portal

The Documentation team maintains a portal that contains links to templates and articles that can assist you in your writing projects.

<http://data-doctor.info/portfolio/style-guide/>

San Leandro Documentation Team

Tone Flores

Lori Writer

Greta Editor

Joan Speller

Microsoft Style Guide

The Microsoft Manual of Style for Technical Publications is the default style guide for internal and external MyCorp communications. A link to this document is available on the Documentation Portal. <http://data-doctor.info/portfolio/style-guide/>. This book provides:

- Correct terminology for user interface elements
- Correct terminology for software development elements
- Alphabetical usage dictionary, which includes proper spelling of computer-related terms
- Concise writing tips

Microsoft Computer Dictionary

The Microsoft Computer Dictionary supplements *The Microsoft Manual of Style for Technical Publications*. It includes terms drawn from a wide variety of topics relevant to computer users. A link to this document is available on the Documentation Portal. <http://data-doctor.info/portfolio/style-guide/>.

Computer User High Tech Dictionary

The Computer User High Tech Dictionary is a free online dictionary of computer technology related terms sponsored by ComputerUser Magazine. <http://data-doctor.info/portfolio/style-guide/>

Elements of Style

Dust off your old copy, view the original book on line, <http://data-doctor.info/portfolio/style-guide/>, or invest a few dollars in the latest edition of, *The Elements of Style* by Strunk & White.

The century-old rules presented in this little book are still valid for clear, concise writing in our technical age.

The Introduction to the original printing states, “It is an old observation that the best writers sometimes disregard the rules of rhetoric. When they do so, however, the reader will usually find in the sentence some compensating merit, attained at the cost of the violation. Unless he is certain of doing as well, he will probably do best to follow the rules.”

Developers and Documenters Working Together

Traditionally, documentation at MyCorp has been a collaboration between subject matter experts (SME), such as developers or content owners, and documenters.

Documentation team members can add most value when you involve them early in the product development cycle. It is never too early to let the documentation team know about an upcoming documentation project. As the old adage says, Prior Planning Prevents Poor Performance.

Check the Documentation Portal Site for useful information for developers.

Agreements

At the start of a documentation project, the SME and documenter should agree on a documentation plan that includes:

- Project scope
- Time line
- Review process

Project Scope

The project scope definition documents the facts and assumptions about the project. The project scope definition could include the following information:

- Name of the project
- Whether this is a new product or an enhancement
- List of design documents
- Proposed documentation languages
- Profiles of intended audience
- Quality goals
- Schedule

Time Line Elements

Given the project scope, the documenter can develop a time line for the documentation project that takes into consideration the release date and personnel available to work on the project. The time line should include the following dates:

1. Documenter reviews design documents
2. Documenter reviews the product against the design document
3. The GUI is available for review
4. Documenter performs the GUI review
5. Developers finalize the GUI; documenter can stage and take screen shots

6. Developers freeze the software
7. Documenter edits the initial draft of the documentation
8. Developers review the edited draft
9. Documenter finalizes the initial document
10. Developers approve the initial document
11. Translators translate the initial document
12. Documenter develops additional documentation formats and media

Ideally, the time line will estimate the elapsed time as well as the work effort for each element.

Reviews

The time line refers to several reviews. Each review has a specific purpose as documented in the following table.

These reviews are an opportunity for the developers and documenters to minimize the expense of small changes late in the project cycle.

Review (step)	Purpose
Design Document (1)	Gives the documenter a feel for the product
Product (2)	Documenter validates the integrity of product with the functions documented in the design document. This includes validation that major features have been documented in the design document and that features planned in the design document are present in the product.
GUI (4)	Documenter checks GUI for usability and consistency with other MyCorp products.
First Draft (9)	Developer verifies that the documentation is accurate.
Final Draft (11)	Developer verifies that the documentation is accurate, complete, and clear.

Naming Standards

TBD

Naming Conventions

For online help give the source and the output file the exact same name.

Document Review Workflow

TBD

Revising this Document

The intent is to maintain this guide as a living, accurate resource. It can remain so with ongoing feedback of things that work or don't work for your particular situation.

Contact Tonie Flores at tflores@MyCorp.com to make comments, changes, or additions to this document.

Chapter 2 User Interface Considerations

TBD

Chapter 3 Document Organization

Users may not read documentation from beginning to end. They may use a document as a reference when they encounter a problem. This section describes things that an author can do to help readers get the information they need in a usable manner.

Consistency

Consistency enhances readability. It reduces the time needed to process information. Use parallel constructions for headings, sentences, and lists.

Categories of Text

A typical technical document has three categories of text:

- Headings
- Descriptions
- Instructions

Images, including diagrams and screen shots, can help illustrate descriptions and simplify instructions.

Organization Methods

Use one or more of the following modes to organize text:

Organization	Sequence by:	Use for:
Alphabetical	Letter of the alphabet	Glossaries Error message guides
Comparison or Contrast	Similar or dissimilar elements	Presenting alternatives Clarifying criteria
General to Specific	Big picture, narrowing to details	Introducing and particularizing principles, concepts, or guidelines
Hierarchical	Rank, relationship, or importance	Showing relationship among elements
Sequential	Order of occurrence	Procedures
Spatial	Top to bottom, left to right, front to back for English	Describing screens or images

Document Storage Structure

Store the set of files that make up the book or documentation project in a separate folder. Create a sub-folder, *Images*, to store all images for the files within the folder.

Naming Conventions

TBD

Document Sets

You can expect to see the following documents included in a documentation set:

Welcome to Product

Includes an overview of the components, a list of documents included in the documentation set, documentation conventions used, and a glossary.

Product Installation Guide

Includes the instructions required to install the product or upgrade from a previous version.

Product Quick Start Guide

Includes basic information for using the demo that is distributed with the product.

Product User Guide

Includes an introduction and instructions for using the product.

Product Administrator Guide

Includes technical information that a system administrator would use. This could include a trouble-shooting section, information on file and table structures, .ini file contents, log file explanations, and non-standard uses of the product.

Master Index

This is a combined index of the all documentation for multi-volume sets.

Heading

Headings are an important part of document organization. Headings hint to the relative importance of topics, suggests how the information is organized, and allow users at various levels of knowledge to use just the part of documentation they need.

Use **Heading 1** style at the start of each new chapter. **Heading 1** appears in the Table of Contents.

Use **Heading 2** for major sections within a chapter. **Heading 2** appears in the Table of Contents.

Use **Heading 3** for sub-sections within a major section. **Heading 3** is the lowest level heading that appears in the Table of Contents.

Use **Heading 4** for minor sub-sections within a sub-section section. **Heading 4** does not appear in the Table of Contents.

Conventions

Use initial caps in titles.

Use singular object names.

Avoid double-negative

Descriptions

Tell who, what, when, where, and why. Consider using diagrams and illustrations.

Structure	Anything that can be divided into parts and has boundaries.
Concept	Definition; A group of objects, relationships, or ideas that have something in common and a called by a common name.
Principle	Statement that tells the reader what should or should not be done; Assumptions.
Classification	Kinds of; categories
Facts	Data, specifications

Define a term at the start. Use the term in the balance of the text.

Define an acronym the first time you use it.

Sentence Structure

As described in the Concise Writing Tips section, clear writing uses short sentences, present tense and active voice verbs, and a simple noun verb object structure. This advice holds true for descriptions.

Examples:

Passive Voice	Active Voice
This was requested by a customer.	A customer requested this.
Selection of the individuals to perform the review is made by the Vice-President of Engineering.	The Vice-President of Engineering selects individuals to perform the review.
Release schedule for enhancements is determined by the MyCorp 3 development team and the Vice-President of Engineering.	MyCorp 3 development team and the Vice-President of Engineering determine the release schedule for enhancements.
Output from a sample upgrade is available in "A Sample Upgrade" section at the end of this chapter.	"A Sample Upgrade" section at the end of this chapter contains output from a sample upgrade.
The MyCorp Server Applications package is removed when the MyCorp	Removing the MyCorp Server removes the MyCorp Server Application package.

Server is removed.	
--------------------	--

Other Examples:

All white papers are associated with an upcoming release number, which is reflected in the path. (verbose)	The path includes the release number of each white paper.
Many people complain that they don't want the tag name to show up when you double-click to expand a trend. (subject agreement)	Many people complain that they don't want the tag name to display when they double-click to expand a trend.

Concept

TBD

Object

TBD

Procedures

- Introduce instructions with text that states what the steps explain. For example, “Complete the following to create a new document.”
- Analyze steps needed to complete the task. Present, in a numbered list, the sequence of actions that lead to the successful result.
- Start each instruction with a verb.

Note: This is generally true. The exception is when you precede the action with context information. For example, From the **Mouse** option of the **Control Panel**, select the **Buttons** tab.

When giving context information, don't give instructions for getting somewhere the user should know how to get to, such as the **Mouse** option of the **Control Panel**.

- Write to second person, that is, you.
- Do not use Transitions words such as: moreover, in addition, also, similarly, likewise, therefore, next, finally, meanwhile, later.

Menu Paths

Separate actions by >, rather than prose descriptions of navigation. For example, **File > Open > Folder**.

Note: This is an instance where this style guide disagrees with *The Microsoft Manual of Style for Technical Publications*.

Completing a screen:

Tell how to navigate to the screen shot

Go through the necessary fields, preferably in reading sequence

Tell how to get off the screen

Be concise

“Click OK,” rather than “Click the OK button.”

Note: This is generally true. If the UI is cluttered or unclear, you may have to specify what the object is.

Index

The purpose of an index is to enable users to find the information they need with ease. For online documents, the index provides alternative access for those who don't, or won't, use the search function.

Placement of Index Markers

Do not put index markers in a heading.

Cross Reference

Cross references in documents create help links online.

Note: If this element of Microsoft Word results in unexpected results, please contact a member of the documentation team. We may be able to save you some time in resolving the problem.

Standards

Include an index in every help file and in each document that is 20 or more pages. Optionally, include an index in shorter documents, if you feel that it would be useful or necessary for usability.

Indexing Tips

1. A reader wants to know what other types, what other modes, what other features, what other subsets, or what other ideas he or she can use to solve a problem or get more information.

Users take alternating paths to information. Users have different learning styles, different searching styles, and different iterating paths within one search session.

2. Indexing skills are still important, for two reasons: 1) ensuring that your users can have alternative paths of access to information, and 2) realizing that information becomes more retrievable when it is tagged with aboutness metadata. Indexing keeps both your users and important data from becoming lost.

3. Predicting what topics to interlink to an index means categorizing and classifying the nature of the knowledge your company publishes now, and is likely to publish in the future.

Reusing Content

Reusing pieces of content can cut down on the resources needed to create content, improve content integrity, and lower translation costs. Categories of content that lend themselves include:

- MyCorp Overview
- Product descriptions or definitions
- Product specifications
- Introductory text, such as, “Use one of the following buttons to exit this dialog:” or
- Paragraphs that can be written once and used in multiple documents. Some examples are, a description of a feature such as ToolTips, various time formats that are used throughout MyCorp products, or a description of My CorpTool trend cursors, which work the same in My CorpTool, RtWebParts, and iViews.

Information that is unique or that changes frequently is probably not suited for reuse.

Chunking

A **chunk** is a small, manageable group of text.

Place like things together.

Exclude unrelated information.

Use a header to label each group and separate it from other chunks.

Include information that has a single purpose or function for the reader.

Examples:

Things to Avoid

Sloppy writing, which can lead to excessive linking or cross referencing

Overly complex presentation

Overly simplified presentation

Formatting Structures

Use **FunctionName** style to highlight text. Do not use the following:

Avoid	Use
()	Use Note style.
" "	Use CodeText style, courier font, " " for code.
<u>Underscore</u>	Use for links.
i.e.	Use "that is."
e.g.	Use "for example."
footnotes	Use Note style.

Chapter 4 Grammar

MS Style Guide

Concise Writing Tips

The following Elementary Rules of Usage and Elementary Principles of Composition are an excerpt from *The Elements of Style* by Strunk & White.

Elementary Rules of Usage

- In a series of three or more terms with a single conjunction, use a comma after each term except the last.
- Make the paragraph the unit of composition: one paragraph to each topic.
- Use the active voice.
- Omit needless words.
- Use present tense.

Sentences

Use short sentences, even though it may give a choppy effect. Avoid compound sentences, which are more difficult for non-native speakers of English.

Voice

In sentences written in **active voice**, the subject performs the action expressed in the verb; the subject acts.

In sentences written in **passive voice**, the subject receives the action expressed in the verb; the subject is acted upon. The agent performing the action may appear in a "by the . . ." phrase or may be omitted.

Example:

Passive: The MyCorp widgets are defined.

Active: MyCorp system manager defines the MyCorp widgets.

Gender

Refer to gender only when gender distinction is necessary for accuracy. In all other cases, remove references to gender by using the following strategies:

Remove pronouns when possible.

Example:

Gender specific: An engineer selects the fixed set of measurements. He then selects the appropriate tags.

Gender neutral for a use case: An engineer selects the fixed set of measurements and selects the appropriate tags.

Gender neutral for a procedure: [You are an engineer.] Select the fixed set of measurements and selects the appropriate tags.

Use plural nouns and plural pronouns.

Example:

Gender specific: The engineer determines the boiler's performance. To do this, he creates an XY plot that compares the temperature tag data.

Gender neutral: The engineers determine the boiler's performance. To do this, they create an XY plot that compares the temperature tag data.

Ethnic References

Refer to ethnicity and country of origin only when these distinctions are necessary for accuracy.

Example:

Japanese documentation conventions differ from those used in English-speaking countries.

Usage

?????I'm thinking about reorganizing these into a table that gives Preferred Usage vs. Less Desirable Usage. It might be a little more palatable in our environment?????

This section defines correct usage for terms that are often misused. Poorly written text takes more time to read, and its meaning is more prone to misunderstanding.

Above vs. preceding

Previous vs. above. Use **previous**, **preceding**, or **earlier** to mean earlier in a book or online document. You can also use **earlier** to refer to a section. Do not use above. Do not use above as an adjective preceding a noun, as in "the above section." See also following.

Below vs. following

Screen vs. **window** n. In applications and graphical interfaces, a portion of the screen that can contain its own document or message. In window-based programs, the screen can be divided into several windows, each of which has its own boundaries and can contain a different document (or another view into the same document).

Dialog, **Dialogue** vs. **Dialog box** The first two are not legitimate substitutes for the last. Do not use them. Use dialog box, not dialog or dialogue.

Log on is a verb To gain access to a specific computer, a program, or a network by identifying oneself with a username and a password. vs. **logon** n. The process of identifying oneself to a computer after connecting to it over a communications line.

Must vs. should. Use **must** to convey a requirement. Words such as **should**, **might**, **can**, **could**, and **could have** can cause problems for translators. It might not be clear whether they refer to an ability, possibility, or obligation.

Understand, receive, or must vs. get or got. Use understand, receive, or must to reduce ambiguity. For example, I get it. I've got to.

Although, after, and because, whereas vs. while, when, and since, and where.

Examples: Since it is dark, it is time to go. (because) While you can write, you cannot sing. (although)

Click with mouse vs. Enter or Press on keyboard.

You can Enter with the Enter button or with a mouse.

Note: Never **Hit**

's vs. s Possessive ≠ plural

Capitalize sparingly

First word in a sentence

First letter of each word in title (exceptions: a, and, the)

Number steps in instructions. Use bullets for lists, unless it is a prioritized list.

Use the articles **a**, **an**, and **the**. They provide clues to indicate that the word that follows is a noun. This will help translators, especially when a word can be used as both a noun and a verb.

Display vs. show – for translation purposes, use **display** as a noun and **show** as a verb. Also use an article. For example, **the display**.

Use the relative pronouns **that** and **which** to introduce subordinate clauses. They provide a clue that following the noun is a modifying clause.

Use singular object, unless it is always plural

Note: Add a noun if the plural is ambiguous. Example, Display, Displays, Display collection, Display objects in SDK.

Use simple verb rather than verb phrase.

Example updates rather than used to update

Avoid references to placement, for example, above, below, previous page, next chapter, subsequent section.

Avoid double-negatives.

Series punctuation -- a, b, and c

Cross references are needed for outline help. (they may be broken in Microsoft Word)

MyCorp product names are not hyphenated.

Example My CorpTool rather than My-CorpTool

MyCorp Widget Repository rather than MyCorp-Widget Repository

Note: There is a complete list of MyCorp product names in MyCorp Product Names on page 35.

Spell out numbers zero to ten in sentences.

Nomenclature

Each thing has one and only one name. Use it consistently.

Be clear. Rather than option, name the object, such as menu, button ...

Select the **New Job** option

Parenthesis

Avoid parenthetical expressions within text. Use complete, correctly punctuated sentences.

Acronyms

Always define the meaning of an acronym the first time it is used.

Abbreviations

Spell out **that is** or **for example** rather than **i.e.** or **e.g.**

Punctuation

Always capitalize first letter in each word of the title.

Apostrophe

Plural does not have an apostrophe.

Possessive has an apostrophe.

Chapter 5 Microsoft Word Strategies

This section describes the elements of Microsoft Word that can help you to write more consistent, attractive documentation.

Environment Variables

For better performance, set the following environment variables.

Choose Settings to Determine How MS Word Functions

1. Follow menu path Tools > Templates and Add-ins...
2. Clear *Automatically update document styles*.
3. Follow menu path Tools > Options...
4. **Save Tab**
5. Clear *Allow fast saves*.
6. Select *Save AutoRecover info* every 15 minutes.

Choose Settings to Automatically Update Fields and References Before Printing

1. Follow Menu path Tools >Options...
2. Select the Print tab.
3. Select options **Update fields** and **Update links** under **Printing options**.

Styles

A style is a set of formatting characteristics that you can apply to text, tables, and lists in your document to quickly change their appearance. When you apply a style, you apply a whole group of formats in one simple task.

For example, instead of taking three separate steps to format your heading as 24 pt, Arial, and bold, you can achieve the same result in one step by applying the **Heading 1** style.

The following are the types of styles you can create and apply:

- A **paragraph** style controls all aspects of a paragraph's appearance, such as text alignment, tab stops, line spacing, and borders, and it can include character formatting.
- A **character** style affects selected text within a paragraph, such as the font and size of text, and bold formats.
- A **table** style provides a consistent look to borders, shading, alignment, and fonts in tables.
- A **list** style applies similar alignment, numbering or bullet characters, and fonts to lists.

There are over 20 styles built in to the MyCorp templates. Each template is self-documenting, that is, it describes the characteristics and use of each of the styles available within that template.


Dynamically Generated Styles

MS Word automatically creates a new style when you modify any element of a style. Therefore, do not modify any style elements. Use only the styles documented in the template.

Do not create new styles in a document, because they create problems when translating or converting documents to online help.

Note: Contact Tonie Flores at tflores@MyCorp.com if you feel you need to change or add an existing style.

Views

Microsoft Word has different ways for you to get a good view of your work, depending on the task at hand. You can change views following menu path listed in the descriptions of the view or by using the view buttons at the bottom left corner of the Microsoft Word window .

Note: The view setting is stored with each individual document. You can't set a default for all documents that you view in Word. You can save a document in the view with which you want it to open. A document that you receive from someone else opens with the view in which it was previously saved.

Print Layout

Print layout view displays a document as it will appear when you print it. For example, items such as headers, footnotes, columns, and text boxes appear in their actual positions. This view is useful for editing headers and footers and for placing columns or drawing objects.

Work in **print layout view** to see precisely how text, graphics, and other elements will be positioned on the printed page.

To switch to print layout view, follow menu path **View > Print Layout**.

Web Layout

Web layout view displays a document as it will appear in a Web browser. For example, the document appears without page breaks and text and tables wrap to fit in the window. In Web layout view, backgrounds are visible, and graphics are positioned just as they are in a Web browser.

Work in **Web layout view** when you are creating a Web page or a document that is viewed on the screen.

To switch to Web layout view, follow menu path **View > Web Layout**.

Normal

Normal view shows text formatting but simplifies page layout so that you can see more content at a time.

Work in Normal view for typing, editing, and formatting text. Normal view shows text formatting but simplifies the layout of the page so that you can type and edit quickly.

In normal view, certain elements do not appear, including:

- Page boundaries
- Headers and footers
- Backgrounds
- Drawing objects, such as AutoShapes, curves, lines, and WordArt.
- Pictures

To switch to normal view, follow menu path **View > Normal**.

Outline

Outline view shows the structure of your document and how headings of a document are indented to represent their level in the hierarchy. You can move, copy, and reorganize headings or text by dragging headings.

In outline view, you can collapse a document to see only the main headings, or you can expand it to see all headings and even body text.

To switch to outline view, follow menu path **View > Outline**.

Other Tips

Use the following Microsoft Word facilities to work with text.

Blank Lines

The only time to use a blank line is following a table. Otherwise, use no blank lines. Use styles, which are designed with correct spacing.

Manual Line Break

There are very few times to use manual return (shift + Enter).

Cover Page to format the spacing of the title, for example, to separate the term “User Guide,” from the rest of the title..

Embedding image


Keep With Next

Do not use manual page breaks (control + Enter) to control pagination. These may not translate as desired across the various formats in which a document may be produced. Use **Keep with next** instead.

Use **Keep with next** sparingly:

- To prevent orphan and widow lines in lists
- To keep introductory text with a table or list

Show/Hide Paragraph Mark

It is often helpful to display formatting marks by selecting the Show/Hide  on the Standard toolbar or following menu path **Tools > Options**. Choose the **View** tab. Select **Paragraph mark** in the **Formatting Marks** section.

Copying

Copying text copies style if you include the paragraph mark at the end of the text.

Section Breaks

A section break divides a document into sections. Each section break stores the formatting elements, such as the margins, page orientation, headers and footers, and sequence of page numbers.

To insert a break, follow menu path **Insert > Break**, select the type of break, and click **OK**.

Use an **odd section break** only at the end of each chapter of a large break.

Do not use page breaks, column breaks, or any other type of section break within the document. They disrupt headers and footers and may interfere with conversion to on-line formats.

Track changes

Use this feature in later phases of document review. This is not useful for an initial review when there are many changes.

Templates

A template is a collection of styles that serves as a master or pattern for your documentation.

How a Template Is Useful

Applying the correct template not only makes your document look better, but also facilitates reuse.

MyCorp Word Document Templates

Name	Contents	Use
White paper	TOC, Index, headers and footers, various styles, revision table, wide body text	White paper
UGT	Cover page, front matter, 22 styles, headers and footers, revision table, images button, indented body text	(User Guide Template) Front matter and first chapter of a user guide.
Chapter	22 styles, headers and footers, revision table, images button, indented body text Like UGT, with no front matter	Additional chapters of a user guide
Blank	22 styles, images button, wide body text	For general use in lieu of Normal, if you wish to use the UGT document styles.

Downloading a Template

You can download any of the MyCorp Word document templates from <http://data-doctor.info/portfolio/style-guide/>, the Documentation Team Site.

Creating a Document Using the UGT Template

Follow these steps create a new document using the UGT Template.

1. Follow **File > New...**
2. The New Document pane opens.
3. Select **UGT**.

Note: The New Document pane lists recently used templates.
4. Follow menu path **File > Properties** to edit the title.
5. Click the **Custom** tab; click **Software**, edit the version number. Click **OK**.
6. The template contains a description of the document styles used in the template. You may overwrite the text.

Applying the UGT Template to an Existing File

Follow these steps to apply the UGT Template to an existing file.

1. Open the existing file. (file A)
2. **File>New... > UGT** (Create a new file using the User Guide Template). (file B)
3. In file B follow menu path **File > Properties** to edit the title.
4. Click the **Custom** tab; click **Software**, edit the version number. Click **OK**.
5. In file A, **Ctrl + A** (select all)
6. **F9** (update fields). Click **OK**.

Note: You can add a manual line break, Shift + Enter, to format the title. Unfortunately, you must repeat this each time you update fields.

7. Scroll past the front matter and table of contents in both file A and file B.
8. This next step is where it gets a little tricky. You want to copy all of the text from file A to file B without copying any section breaks or page breaks from file A and without overwriting any section breaks or in file B.
9. After you have copied all of your text to file B, Ctrl + A (select all). F9 (update fields). Click **OK**.
10. Check the TOC. Modify heading styles, if necessary, to match the TOC in file A.
11. Scroll through the document, and erase all blank lines.
12. **Format > Styles and Formatting**. This opens a side pane that lists formatting styles.
13. Click anywhere in non-heading text. The style is usually **Body Text** or **Normal**.
14. The name of the style appears in the **Formatting of selected text** box at the top of the Styles and Formatting pane. Click **Select All** just below the box.
15. In the **Pick Formatting to apply** box just below the buttons, scroll to **Body Text**.

Note: There may be several variations of body text. The correct variation is spelled exactly as noted.

16. Click **Body Text**. The format of all selected text should change to the correct **Body Text** format.
17. Repeat the four preceding steps for bulleted text; select **List Bullet**.

Note: There may be several variations of bullet styles. The correct variation is spelled exactly as noted.

18. Repeat the steps for numbered list; select **List Number**.

Note: There may be several variations of numbered styles. The correct variation is spelled exactly as noted.

19. Repeat the steps for highlighted text; select **FunctionName**.

Note: There may be several variations of function name. The correct variation is spelled exactly as noted (capital N, no space).

20. Scroll through the document and use the styles in the UGT template to make adjustments as necessary.

Page Setup

For a user guide:

Margins

Top	1
Bottom	.75
Inside	1
Outside	1
Gutters	0

Paper

Paper size	Letter
Width	8.5
Height	11

Layout

Section start	Odd page
Different odd and even	Select
Different first page	Select

Tables

A **table** is a collection of rows and columns of cells that you can fill with text and graphics. A table can be useful for aligning and presenting information, for example as in the listing of document templates in **MyCorp Word Document Templates**.

Some parts of a table can only be seen if you display all formatting marks by clicking Show/Hide on the Standard toolbar.

Table Properties

After you initiate a table, follow these steps to set table properties.

1. Click in the table.
2. Follow menu path **Table > Table Properties**.
3. Select the **Row** tab.
4. De-select **Allow row to break across pages**.
5. Click **OK**.

Select the heading of the table. Follow the previous menu path to select **Repeat as header row at the top of each page** for the table heading. Click **OK**.

Headers and Footers

A **header** appears at the top of every page in a section. A **footer** appears at the bottom of every page. Headers and footers often contain page numbers, chapter titles, dates, and author names, depending on the template in use.

Images

The User Guide Template does not include a style for pictures. We recommend saving each image as a separate file and linking and embedding it into the Microsoft Word document. This only sounds impressive. The directions are quite simple.

Benefits of Embedding and Linking Images

Maintaining images as separate files makes the images available in their native, high resolution state. This makes it possible to optimize the images for various uses:

- Print document
- Online document
- Localization
- Marketing uses

Initial Setup

Each time you create a new document that will include images, create a subdirectory called **Images** in the same directory as the Microsoft Word document.

Each book has a separate **Images** folder associated with it.

Note: A book may have multiple chapters. Store each chapter as a separate document, if the book is more than 100 pages or so. Keep all documents associated with a book in the same directory. The **Images** folder can store images for all chapters of the book.

Capturing the Image

We recommend using MS Paint to capture screen shots.

For a drawing, use Visio or PowerPoint, and save the file as a .wmf file.

Save an MyCorp trend as a .svg file.

When taking a screen shot use the default settings of MS Paint, and follow these steps:


1. Click in the window you wish to capture.
2. Press Alt + Print Scrn to save the image to the clipboard.
3. Open Paint.
4. Paste the image in Paint.

5. Save the Paint file or other image in the **Images** directory. Give the file a relevant name rather than a generic name such as, **Image1**.

Note: If you prefer to use Snag-It for screen captures, please discuss with the documentation team to optimize your settings.

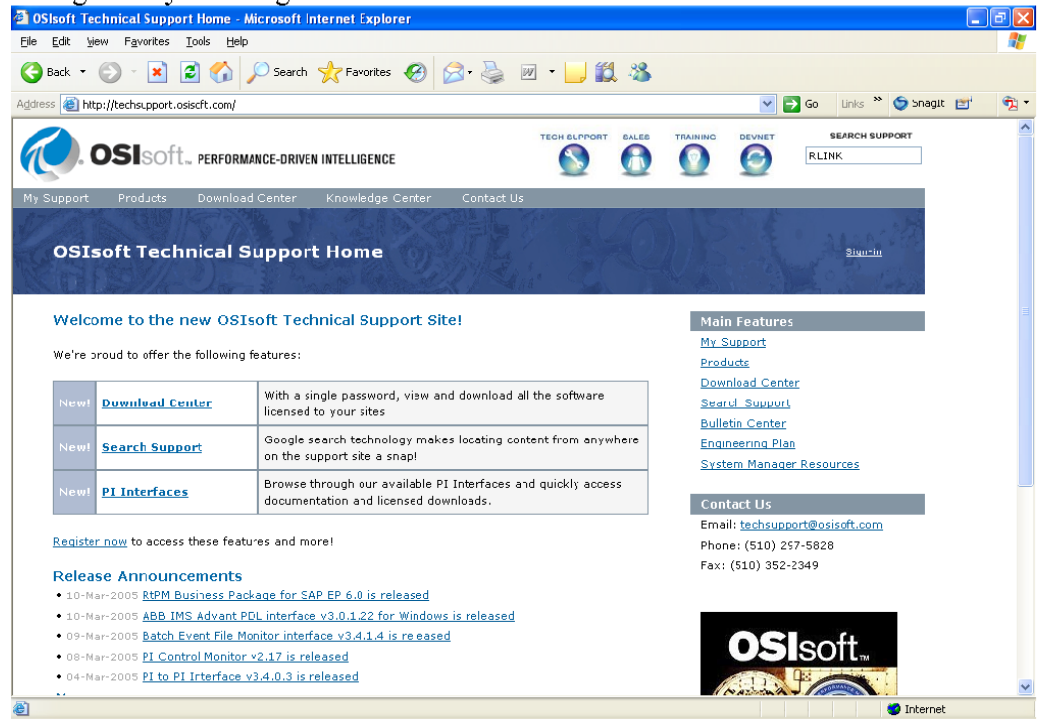
Importing the Image

To embed and link the image into your document as an inline picture:

1. Insert a manual line break at the point you wish to insert the image.
2. Click . Browse to select the image you wish to paste.

Note: You can also follow menu path **Insert > Picture > From File** and select the **Insert and Link** option from the **Insert** button.

3. Navigate to your image to insert it after the manual line break.



Note: Don't worry about adjusting the image size or the white space around the image for documents that will the documentation finalizes. The team uses a macro to make the adjustments.

Adding a Caption

Captions are not necessary. Captions are discouraged. If you choose to add a caption to an image:

1. Type the caption text.
2. Apply paragraph style **Caption**.

Figure 9 Example of a Report

Note: Keep captions short. Text often expands when translated.

Screen Shot

Use screen shots to provide contextual information when words do not suffice.

Avoid step-by-step screen shots for procedures that use standard wizard applications. Unnecessary screen shots can increase the cost of maintenance and translation.

Miscellaneous Guidelines

Spell Check, Grammar Check

Microsoft Word can perform spell check as you type or on request. You may choose either option by following these steps:

1. Follow menu path **Tools>Options...**
2. Select the **Spelling & Grammar** tab.
3. Select or clear the **Check spelling as you type** based on your personal preference.
4. Select **Always suggest corrections, Ignore words in UPPERCASE, and Ignore Internet and file addresses.**

Note: Use the Microsoft Word suggestion as a guide. Don't assume that it is always correct. The guesses are often wrong for highly technical material. But, take the guess as a clue that the sentence may need to be simplified.

Readability

Perform spell-check and grammar-check on all documents.

Aim for 6th to 8th grade readability. To provide readability statistics,

1. Follow menu path **Tools>Options...**
2. Select the **Spelling & Grammar** tab.
3. Select or clear **Check Grammar as you type** based on your personal preference.
4. Select **Check Grammar with spelling and Show readability statistics.**

Thesaurus

The Microsoft Word thesaurus can often provide a list of synonyms for the text you look up. This can be useful for finding an elusive word or for validating the appropriateness of your word choice.

To use the Thesaurus, right-click the word or phrase for which you seek synonyms. Select **Look Up...** or **Synonyms**. Results appear in the **Research** task pane.

To look up additional related words, click a word in the list of results.

To use one of the words in the list of results or to search for more words, point to it, click the down arrow, and then click **Insert**.

Publishing a Microsoft Word Document

The preferred procedure for publishing is to first create an Adobe Acrobat file. This preserves formatting regardless of output device.

Adobe PDF Conversion Settings

Perform these steps to choose publishing-level resolution settings in Microsoft Word.

Note: Conversion settings persist; you must do this once on each computer.

1. Open the Microsoft Word document.
 2. Follow menu path **Adobe PDF > Change Conversion Settings**.
 3. Verify the following settings on the **Settings** tab:
 - In the **PDFMaker Settings** section, select **Press Quality** in **Conversion Settings**.
 - In the **Applications Settings** section,
 - Clear **Attach source file to Adobe PDF**.
 - Select **Add bookmarks to Adobe PDF**.
 - Select **Add links to Adobe PDF**.
 - Clear **Enable accessibility and reflow with Tagged PDF**.
 4. On the **Bookmarks** tab, select the headings that you want as bookmarks in the PDF. Typically, these are **Heading 1**, **Heading2**, **Heading 3**, and **HeadingAppendix**.
-
- Note: Omit **Heading 3** if you have a large number of headings in the document.
-

5. Click **OK** to save these settings.

PDF Print Settings

Perform these steps to select print options and embed fonts in Microsoft Word.

6. Open the Microsoft Word document.
7. Follow menu path **File > Print**.
8. In the **Printer** section, select **Adobe PDF** in the **Name** drop down menu.
9. Click **Properties** to open printer properties for the Adobe PDF printer.
10. Verify the following settings in the **Adobe PDF Settings** tab:
 - Select **Press Quality** in **Default Settings**.
 - Clear **Do not send fonts to “Adobe PDF”**.
11. Click **OK** to apply the PDF settings.
12. Click **Cancel** to exit the Print dialog.

Pre-Printing Checklist

Prior to printing, update all fields, the TOC, and the index.

1. Press **Ctrl + A** to select the entire document.
2. Press **F9** to update all fields, including the custom version number, table of contents, embedded fields, and index references.
3. Select **Update entire table of contents**.
4. Click **OK**.
5. Check page breaks and section breaks to make sure that there are orphans or blank pages.
6. Validate headers and footers.

Printing

To create the PDF, follow menu path **Adobe PDF > Convert to Adobe PDF**.

Adobe PDF may save the Microsoft Word document before proceeding.

Adobe also displays a dialog in which you must specify where to save the output PDF.

The conversion process may take 5 minutes for a 75 page document, and it locks the computer while it processes.

The output from this process is a PDF that has hyperlinked cross-references and TOC.

Note: If your document is large, print double-sided to save trees. This also makes it easier to tell when an odd page is printing on the wrong side.

Proofing Checklist

Prior to distributing the PDF file open it and, verify the following:

- Date on the cover is correct
- Front matter is formatted correctly
- TOC links work
- Fonts are consistent

Notes: if you see this, check your PDF conversion settings

- Header and footers match our style guide template

Header name matches the chapter name

Front matter page numbers are sequential Roman numerals

Chapter pages are numbers are sequential Arabic numbers starting with 1

Even headers and footer are consistent; odd headers and footers are consistent;
first page has no header

-
- Chapters start on an odd page for large documents

Note: Chapters may be continuous for shorter documents.

- Consistent bullets in lists
- Sequential numbering in numbered lists

Chapter 6 Guidelines for MyCorp Products

MyCorp Logo

?????color

?????other guidelines

MyCorp Product Names

P MyCorp Widget

MyFine Finder

Wordlists

MyCorp Products

The following terms are correct.

Duhickies

MyCorp Duhickie	The MyCorp 3 Duhickie for Windows and UNIX acquires data from disparate sources and routes these data throughout the MyCorp System's infrastructure; it serves as the foundation for all MyCorp components. It runs on MS Windows and UNIX OS.
MyCorp Duhickie on Mac (4.x)	The MyCorp Duhickie runs on OpenVMS and acquires data from disparate sources and routes these data throughout the MyCorp Duhickie infrastructure; it serves as the foundation for all MyCorp components.
MyCorp Update Duhickie (Moving 3.X TO 4.x)	MyCorp3 to MyCorp4 Migration Preparation and Survey Kit, MyCorp3 to MyCorp4 Migration Utilities (MyCorp3Mig and others), documentation, comparison of MyCorp3 to MyCorp4 features, and Frequently Asked Questions (FAQs).

Piece Sections

DataSheet Control	The MyCorp DataSheet Control allows you to manually enter data associated with MyCorp Piece Sections and color code the data using sets of configurable limits.
MyCorp Product Name	MyCorp Product Name description of what wonderful thing this product does for our esteemed customers.
MyCorp Product Name	MyCorp Product Name description of what wonderful thing this product does for our esteemed customers.
MyCorp Product Name	MyCorp Product Name description of what wonderful thing this product does for our esteemed customers.
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MyCorp Product Name	MyCorp Product Name description of what wonderful thing this product does for our esteemed customers.
MyCorp Product Name	MyCorp Product Name description of what wonderful thing this product does for our esteemed customers.

Layered Products

MyCorp Component	MyCorp Component description of what wonderful thing this product does for our esteemed customers.
MyCorp Component	MyCorp Component description of what wonderful thing this product does for our esteemed customers.
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Chapter 7 Guidelines for Non-MyCorp Products

Verify product names.

Copyrights and Trademarks

Use the standard statement or get a legal review. Documents intended for international use may require additional legal review.

SAP

Always specify the transaction code. Consider specifying the menu path in addition.

Chapter 8 Localization Considerations

Your document may be extracted or revised for different locations.

The Importance of Translation

Translation is matching the same concept in one language to the target language. Localization, on the other hand, is both translation and adapting the message, product, software, and so on so that it looks and feels as if it were created in the target country.

As a writer or developer, you may not necessarily know where your product will be localized, but you can start by creating source material that is designed to reach as much of the global audience as possible. This is called internationalization, which is planning and implementing strategies with localization in mind.

????? This section should include details of the MyCorp plans to translate in to 7 languages. Also, we should include statistics on the cost of translation generally, the cost of translation to MyCorp, and how much it is expected to increase?????

Writing globally means being conscious of the style choices you make when writing your content. Many of the style principles advocated for internationalization already apply to technical communication in general. A straightforward, unambiguous style is easier to read and translate. Make terminology consistent.

All of the guidelines presented in the Document Organization and Grammar chapters apply to writing for localization. Pay particular attention to the following sections:

- Consistency
- Short sentences are easier for machine translation
- Positive wording in sentences
- Appropriate punctuation; avoid dashes, ampersands, and parenthetical plural [(s)]
- Correct English capitalization to avoid confusion

Note: Capitalization rules are different for different languages.

- Verb
- Usage
- Benefits of Embedding and Linking Images

By following the additional guidelines presented in this chapter, you can produce more readable text and help translators work more effectively.

Problematic Usage

These grammatical structures can pose problems for readers and translators.

Structure	Recommendation
Gerund	A gerund is a noun that looks like a verb, for example working , managing , and getting . This noun form is not always found in other languages. Gerunds are commonly used in English headings, but do not translate well. Avoid using them.
Modifiers	Avoid using long strings of noun modifiers.
Humor	Humor is culturally subjective. It rarely translates well.
Non-English Words or Phrases	Avoid them. They hinder translation.

Word Usage

The following make translation more difficult or may not translate at all.

- Acronyms
- Homonyms
- Idioms
- Figurative language
- Long strings of modifiers
- Metaphors

Special Challenges

- Cultural sensitivity
- Layout – 8.5 x 11, vs. A4 (8.27 x 11.69)
Text expansion (as much as 25-30%); special consideration for captions
- Date formats are not universal
- Holidays and time zones differ; Sunday is not necessarily the first day of the week
- Weights and Measures – indicate conversion factors
- Special character sets may not be available in all fonts
- Country-specific requirements?????
- Copyrights – do they apply in the other country? Have a legal review.

Help is on the Way

Start with design

Tools

CMS, XML

AuthorIT

- Consistency of language

Word Choices

Use the MyCorp glossary and word lists to assure consistent spelling and usage. The lists contain technical terms and their definitions. Our translation partners also use these lists to determine what **not** to translate. The glossary and word lists avoid unnecessary inquiries from translators to the owner of the source material. This reduces the time and expense of translation.

Graphics for an International Audience

Chapter 9 Sources

Chapter	Source
Localization	http://www.stc-sf.org/newsletter/2005-jun/apr_meeting.html
	Translation Stumbling Blocks, Betsy M. Marks, Intercom,

Index

Revision History

Date	Person	Description of changes