

Technical Writing Style Guide

Rev. 2

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Abbreviations & Acronyms

Abbreviations

An abbreviation is a shortened form of a word or phrase. Both acronyms and abbreviations save time and words, but they can confuse the reader who is not familiar with them.

Rules

- Whenever possible, avoid abbreviations; type the entire word.
- Do **not** use Latin abbreviations (such as **i.e.**, **e.g.**, **et al.**, **etc.**, and **N.B.**); use the English equivalents instead. The abbreviations a.m. and p.m. are exceptions.

Correct

On the cover sheet write the type of foreclosure (**for example**, reinstated, REO, or cancel).

Incorrect

On the cover sheet write the type of foreclosure (**e.g.**, reinstated, REO, or cancel).

Acronyms

An acronym is a word formed from the first (or first few) letters of a series of words, such as FAC (First American Corporation).

Rules

- Avoid starting sentences with acronyms.

Correct

Associates complete Job Performance Discussion (JPD) forms before meeting with their managers.

An automated valuation model (AVM) is ordered automatically for loans that meet certain criteria.

- The spelled-out versions of acronyms are **not** automatically shown with initial capital letters for each word. If the words are proper names, initial capitals are appropriate. Many acronyms represent common terms that do not require capitalization when spelled out, such as "annual percentage rate" for APR. See the **Acronyms** for the spelled-out versions of many acronyms used at Ameriquest.
- Do not spell out acronyms in headers or in the RoboHelp table of contents.

Plurals of Acronyms

If acronyms are used, the plural form is created by simply adding an **s**; do not use **'s** (**apostrophe + s**).

Correct

The Insured AVM Specialty Group tracks all loans using Insured AVMs.

Incorrect

The Insured AVM Specialty Group tracks all loans using Insured AVM's.

Acronyms as Possessives

- To form a possessive of an acronym, use an **'s** (**apostrophe + s**); precede acronym with the word **the**.
- For acronyms of names, such as companies or departments, do not use **the** before the acronym.

Correct

Today is the CFO's birthday.

These guides are some of TW's products.

Incorrect

Today is CFO's birthday.

These guides are some of **the** TW's products.

Capitalization

About Capitalization

Overview

The trend over the past 50 years has been to reduce capitalization in documents. This topic lists the basic rules for capitalization. See related topics for the style guidelines that have been selected for particular situations within title and mortgage companies.

Rules

- Capitalize the following:
 - The first word of a sentence

- The first word of items in ordered lists or unordered lists
- Proper nouns and proper adjectives
- The first, last, and all major words in titles and subtitles of works such as books, articles, songs, and online documents
- The days of the week, months, and holidays
- The first word of a quoted sentence, but not a quoted phrase
- Shortened forms of capitalized words
- Acronyms for departments and agencies of the government, other organizations, and the call letters of radio and television stations

Examples

Fair Housing Act

U.S. Department of Housing and Urban Development

Monday, February, Columbus Day

FHA, HUD, KFWB

- Do **not** capitalize the following:
 - Common nouns
 - Articles unless an article is the first word in the title
 - Coordinating conjunctions
 - Prepositions of four or fewer letters
- Do **not** start a sentence with a term that must be spelled all lowercase.
- **Avoid** starting a sentence with an acronym.
- Do **not** use all uppercase letters for emphasis; use only for acronyms.

Capitalization and Punctuation

Overview

In addition to the rules described in the _____ section of this manual, note these capitalization rules that apply to words following certain marks of punctuation.

Rules

- Always capitalize the first word in a hyphenated word in a title. Capitalize the second word only if it is a noun or an adjective or is as important as the first word.

Correct

State-**S**pecific Lending Requirements

Ordering Sale-**D**ate Inspections

Applying Stage Make-**u**p

Incorrect

State-**specific** Lending Requirements

Ordering Sale-**date** Inspections

Applying Stage Make-**Up**

- A **sentence** that is set off **within another sentence** by dashes or parentheses should not be capitalized.
- A sentence within parentheses that stands by itself **is** capitalized.
- Do not capitalize the word following a **colon** unless the word is a proper noun or the text following the colon is a complete sentence.
- Do not capitalize the word following an **em dash** unless it is a proper noun, even if the text following the em dash is a complete sentence.

Correct

Several criteria were used: **The** criteria were service, stability and knowledge.
Several criteria were used: **service**, stability and knowledge.

Incorrect

Several criteria were used—**the** criteria were service, stability and knowledge.
Several criteria were used: **Service**, stability and knowledge.

Names of Documents, Forms, and Reports

Rules

- In general capitalize the names of documents, forms, and reports. Try to obtain copies of such items that you must refer to, so you can determine the exact name to use.
- Do not capitalize the words "form," "request," or "report" unless the word is actually part of the name.
- If the name of a document, form, or report appears in all uppercase letters, use the same name in P&P text, but use uppercase and lowercase letters instead.

Correct

Agreement Concerning Non-Refundability of Advance Fees
Consumer Caution and Home Ownership Counseling Notice
Notice of Intention to Foreclose
Notice to Inquirers and Loan Applicants
Notice to Purchaser-Mortgager form
Personnel Change Request (PCR)
Trial Balance Report (P165)

Note: Although the word "Non-Refundability" (in Agreement Concerning Non-Refundability of Advance Fees) does not need a hyphen, in your document use the name as it appears on the form. If you are able to change the name of an internal form to eliminate incorrect hyphens or other punctuation, please do so.

Incorrect

NOTICE TO PURCHASER-MORTGAGER

Notice to Purchaser-Mortgager Form

Names of Online Guides

Rules

- Use initial caps for the names of online guides produced by Technical Writers.
- Do not use boldface text for these names unless the name appears in a heading or subheading or as a link.

Correct

DTS 2.0 User Manual
Data Trace Style Guide

Names of Software and Systems

Overview

As with vendor names, take care to type software and system names correctly.

Rules

- When referring to the names of computer systems, try to follow the naming conventions of the vendor or, in the case of systems developed in-house, the developers.
- A list of system names appears in this topic. Add these names to the RoboHelp (any applicable editing tool) dictionary if you want to prevent red wavy lines from appearing under them on-screen.

System Names

Data Trace System
Data Tree
Fidelity's Mortgage Servicing Package (MSP)
Fidelity's Mortgage Servicing Package Director
ImageVision
Microsoft PowerPoint
Microsoft Visual SourceSafe (VSS)
Mortgage Servicing Package (MSP)

TeleTitle
Tracker
Visual SourceSafe (VSS)

Names of Vendors

Rules

When referring to vendors or business partners, try to follow the naming conventions of the vendor. Check the vendor's Web site for guidance.

Examples

Dimont & Associates
FedEx (no spaces)
Jasc Software, Inc.
JPMorgan Chase

Names of Web Sites, Pages, Options

Overview

This topic describes capitalization and the use of boldfaced type for names of intranet and Internet sites, pages, and options.

Rules

In general, use initial caps and boldfaced type for the names of Web sites and Web pages. Follow this same general guideline for the names of Web page elements that users can click or select, such as menus, tabs, and buttons.

Correct

Go to **Title Services**, and click **Subdivided**.
Print your First American paycheck stub from the **eWorkforce** Web site.
Search for the term using **Google**.

Publishing Content

Generating Web Help

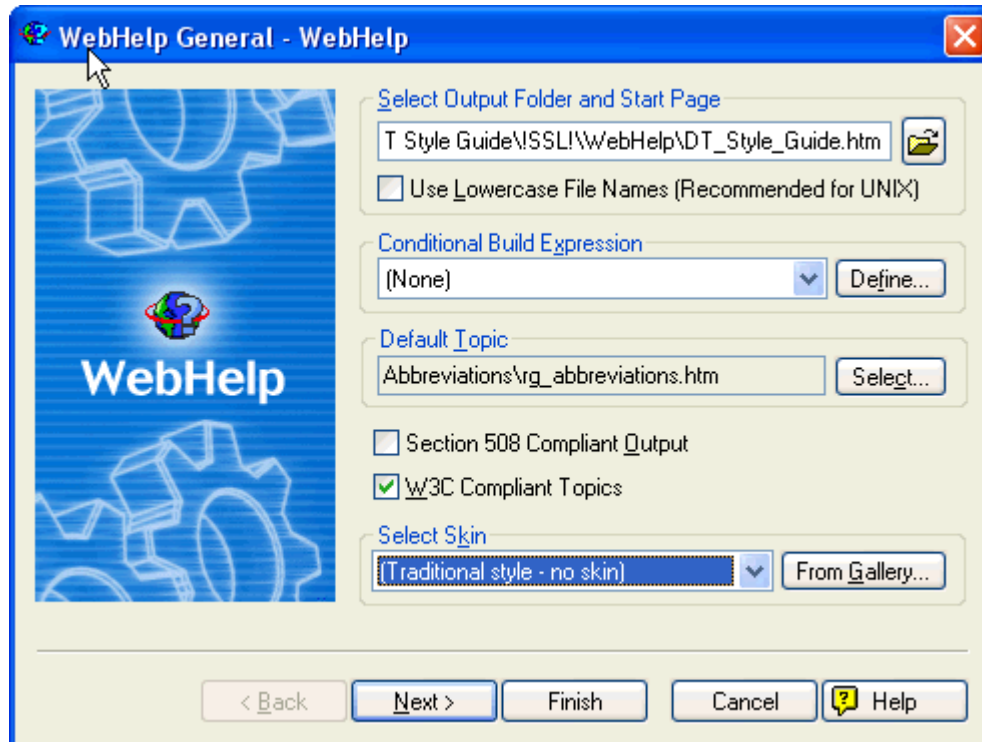
The WebHelp folder contains the HTML files to be copied to the staging folder, and eventually published to production.

Note: The procedures in this topic describe the settings to use when generating WebHelp for the first time. For projects in which WebHelp has already been generated, the correct settings already exist and do not need to be reentered.

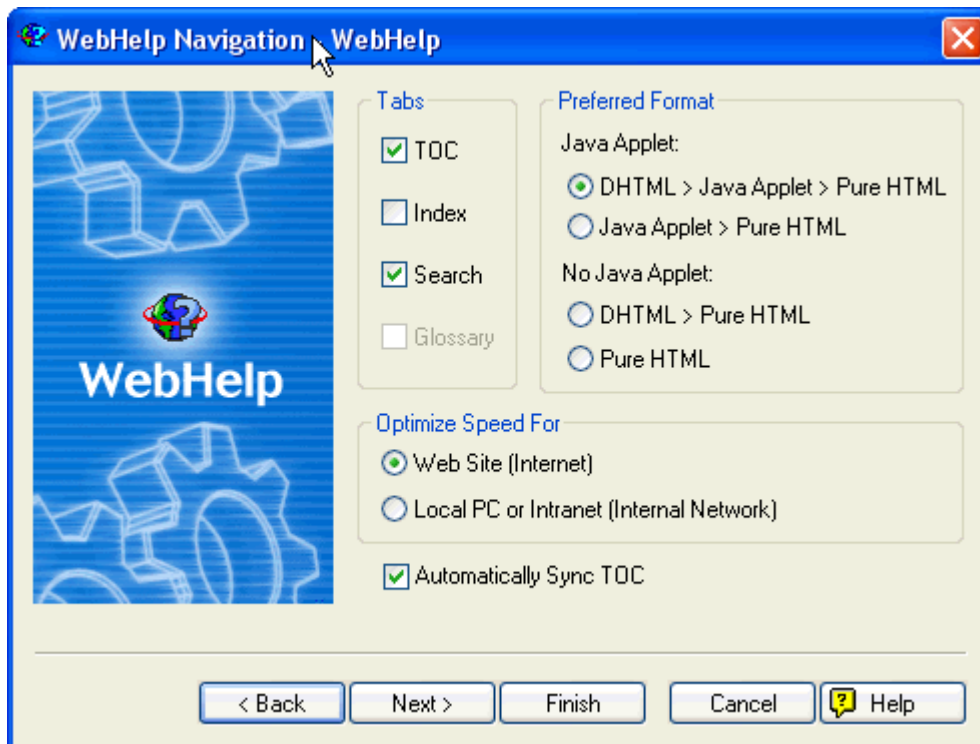
Procedure

To generate WebHelp (for the first time only):

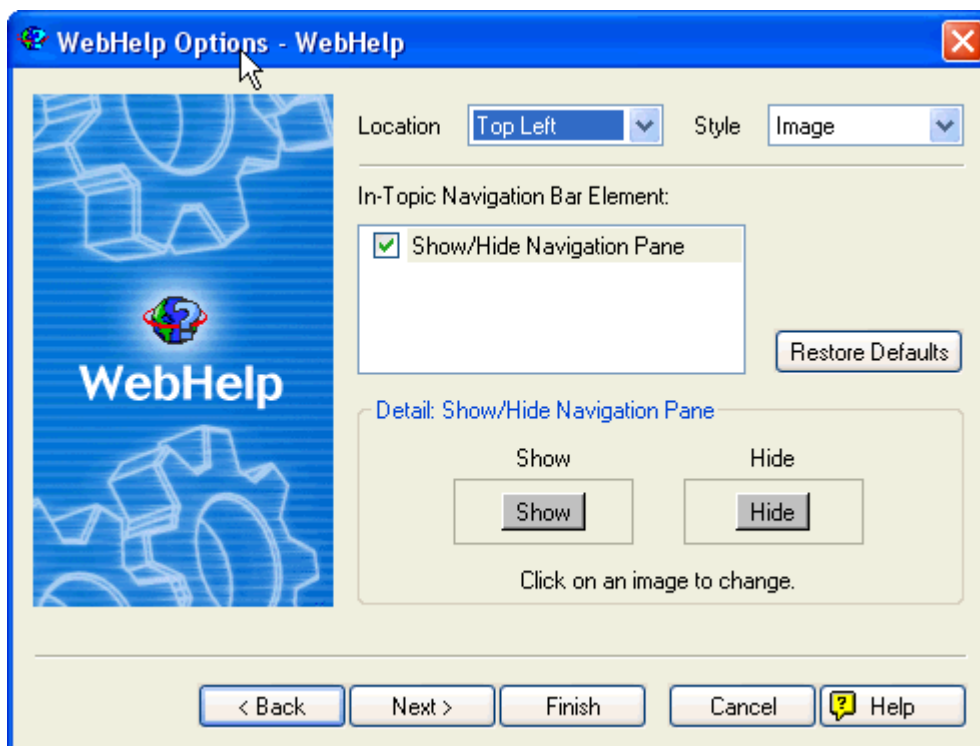
1. On the **File** menu, click **Generate**, and then click **WebHelp**.
2. In the **WebHelp General** window, select the correct output folder; under **Select Skin**, make sure that **Traditional Style – no skin** is selected.



3. Click **Next**.
4. In the **WebHelp Navigation** window, under **Tabs**, select **TOC** and **Search**; if **Index** is selected, clear it.



5. Under **Preferred Format**, click **DHTML > Java Applet > Pure HTML**.
6. Under **Optimize Speed For**, click **Web Site**.
7. Select **Automatically Sync TOC**.
8. Click **Next**. The **WebHelp Options** window opens.



10. Under **Location**, click **Top Left**; under **Style**, click **Image**.
11. Under **In-Topic Navigation Bar Element**, make sure the **Show/Hide Navigation Pane** check box is selected.
12. Under **Detail: Show/Hide Navigation Pane**, make sure the custom **Show Contents** and **Hide Contents** buttons are displayed.
13. Click **Finish**.

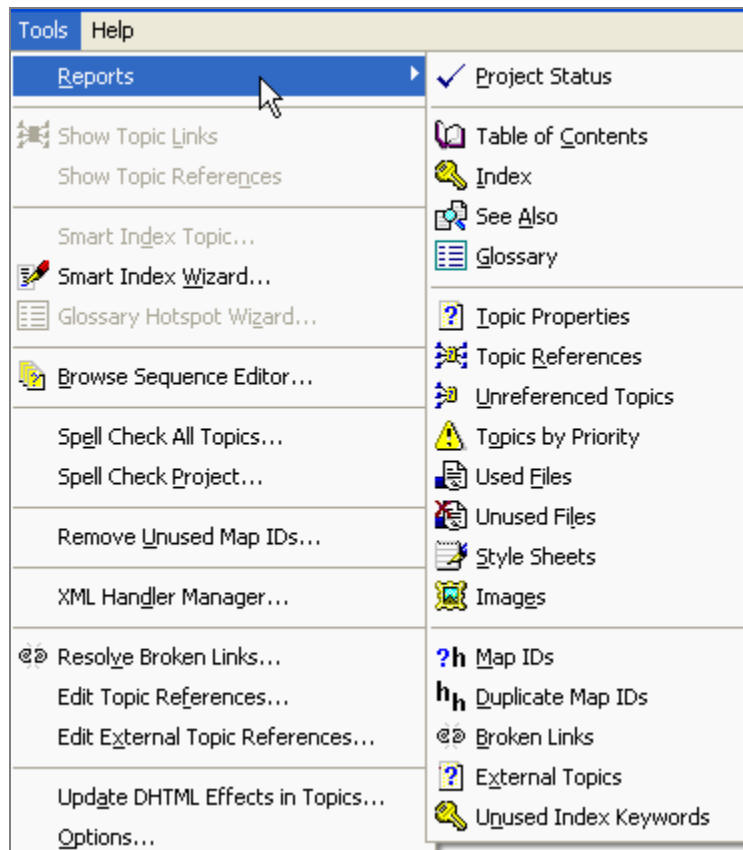
Printing RoboHelp Reports

Use RoboHelp reports to identify broken links, unused files, and other information when preparing to publish a project to improve project quality.

Procedure

To print a RoboHelp report:

1. On the **Tools** menu, point to **Reports**.



2. Click a report name, such as **Broken Links**, **Unused Files**, or **External Topics**, to generate a report.

Publishing Content

Overview

Publishing content in RoboHelp is done by publishing your project. Projects contain single source layouts which allow you to publish output files to a specific location. This can be to your local hard drive, a company intranet, the Internet, or to a network drive.

Single source layouts act as templates for different versions of your project. Typically, when you generate a different version of your project, different settings are used for the output (such as skins, conditional build tags, or navigational buttons). You can save these settings in single source layouts and publish whenever needed.

Procedure

To Publish Content:

1. Define a publishing destination for your WebHelp.
2. Click the **Project tab** to display the Project Manager.
3. Expand the **Single Source Layouts** folder.
4. Right-click the layout and select **Publish**. If you are prompted to generate and want to include your changes when you publish, click **Yes**. If not, click **No**.
When the process is complete, a dialog displays statistics about the publishing process and a list of files published.
5. Click **Close**.

Note: You may need to work with network administrators or other writers to determine publishing destinations and version control.

Troubleshooting RoboHelp Links

If a RoboHelp project contains references that no longer work, follow this procedure to identify where they are.

Procedure

To troubleshoot RoboHelp links:

1. Click the **Project** tab and then click the plus sign for the **Broken Links** folder.
2. Right-click a broken topic, and click **Show Topic References**. All of the references to the topic are listed, so you can investigate the cause of the broken link.

Topic References Window

Use the **Topic References** window log to look up references for topics in a project. It indicates where references originate so they can be modified or removed.

Topic: Displays the name of the selected topic.







References: Identifies all references to the topic. References include books and pages in the table of contents, topic links and keywords.

Edit: Tracks the origins of the reference. Book and page properties are displayed in their respective dialogs and links (jumps) open the topics in the WYSIWYG Editor. Keywords cannot be tracked from here.

Delete: Removes the selected table of contents entry from the table of contents. Links can only be removed by editing the topic in the WYSIWYG Editor. Keywords cannot be removed from here.

Restore: Restores HTML file references. References to non-HTML files cannot be restored.

The following table illustrates the link icons in RoboHelp:

Icon	Description
	Table of contents items (books and pages that are linked to the topic)
	Links to the topic from other topics
	Links to bookmarks in the topic
	Keywords in the index that are associated with the topic
	Aliases used by the topic for context-sensitive Help
	Clickable areas in image maps (hotspots) that are linked to the topic

Visual SourceSafe (VSS)

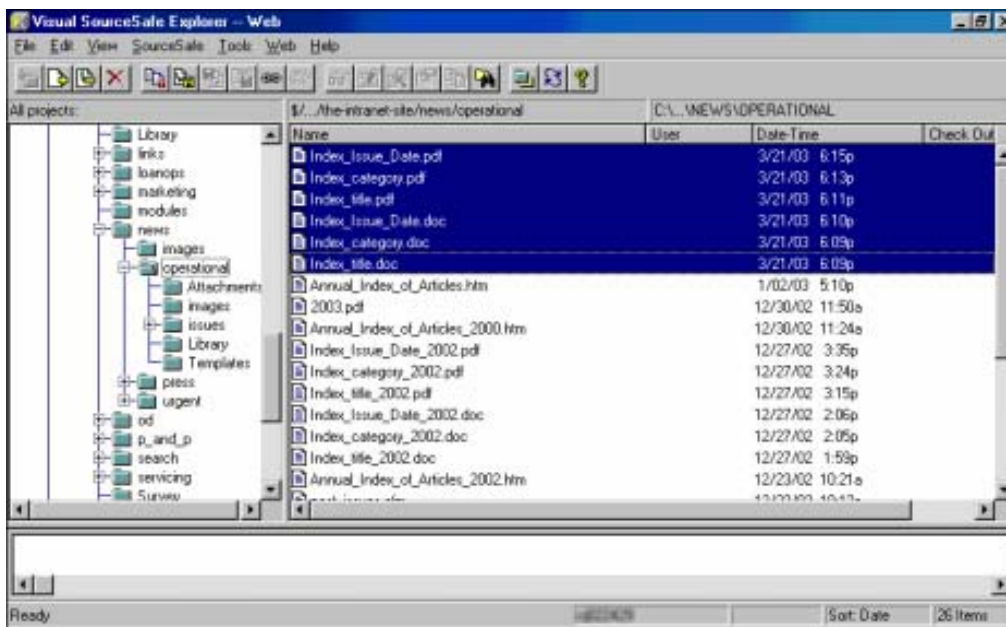
Microsoft Visual SourceSafe (VSS) is a centralized file management system that enables multiple information designers to gain access to and modify files and folders. A folder on each information designer's personal computer hard drive is linked to VSS.

Rules

- Information designers check files **in** and **out** of VSS as needed.
- Information designers check files **out** of VSS to modify or correct them. Checking files out prevents others from working on the same files simultaneously.
- After completing work on the files, information designers check the files back **in** to VSS, where they can then be opened by others as needed.

Note: When checking files **in**, users are prompted to type a description and publishing date.

VSS Explorer Window



Front Matter

Discontinued Practices

Overview

This topic describes style and naming conventions that have been discontinued. You might encounter instances of these old conventions in existing Information Design RoboHelp projects. In most cases, you should change the old style to the new style. Check with your team leader if you have questions.

2007

Correct

August 9, 2007 (see **Dates**)

Incorrect

XX/XX/07

Style Guide Sections

Overview

A style guide is essential in a writing group to ensure "order and consistency on a language that has boundless possibilities."

The Standards and Style Guide has the following major sections:

Section	Contains rules for
Naming and Format Conventions	Naming topic titles, files, and images, and conventions for using boldfaced text and underlining
Procedure Writing	Writing and formatting procedures
Review and Approval Process	Obtaining reviews and approvals of RoboHelp projects
Content Publication Process	Publishing RoboHelp projects
Grammar and Usage	Writing with correct grammar and usage
Hyphenation and Compound Words	Hyphenating words, forming compound words, and using prefixes correctly
Indexing	Creating indexes in Data Trace information products
Lists	Using ordered and unordered lists and related devices
Misused and Easily Confused Words	Using words in English that are often misused, misspelled, or confused with other words and words for which specific IDD style decisions have been made
Numbers	Using numbers and numerals, including general rules, units of measure, percentages and fractions, ranges of numbers, dates, times, and telephone numbers
Punctuation	Using various marks of punctuation
Style for Windows-based Software Documentation	Describing Windows-based software in procedures
Symbols	Using symbols, copyrighted works, trademarks, and service marks
Tables	Creating table formats and handling certain content, capitalization, and punctuation issues in tables

Recommended References

Overview

This topic describes recommended reference books for writers in the Information Design Department.

Garner, Bryan A. **A Dictionary of Modern American Usage**. New York: Oxford University Press, 1998.

Hodges, John C. **Harbrace College Handbook: With 1998 MLA Style Manual Updates**, 13th ed. New York: International Thomson Publishing, 1998.

Microsoft Manual of Style for Technical Publications, 3rd ed. Redmond, WA: Microsoft Press, 2004.

Mortgage Banking Terms: A Working Glossary, 9th ed. Washington: Mortgage Bankers Association of America, 2002.

Mulvany, Nancy. **Indexing Books**. Chicago: University of Chicago Press, 1994.

Random House Dictionary of the English Language, 2nd ed. unabridged. New York: Random House, 1987.

Random House Webster's Unabridged Dictionary, 2nd ed. New York: Random House, 2001.

Strunk, W., Jr. and E.B. White. **The Elements of Style**, 4th ed. Boston: Allyn and Bacon, 2000.

The Chicago Manual of Style, 15th ed. Chicago: University of Chicago Press, 2003.

The Little, Brown Handbook, 9th ed. New York: Pearson Education, 2004.

The New York Public Library Writer's Guide to Style and Usage. New York: HarperCollins, 1994.

Wellisch, Hans H. **Indexing from A to Z**. 2nd ed. New York: H.W. Wilson, 1995.

Williams, Robin. **The Non-Designer's Design Book: Design and Typographic Principles for the Visual Novice**, 2nd ed. Berkeley: Peachpit Press, 2003.

Words into Type. Based on studies by Marjorie E. Skillin, Robert M. Gay, and other authorities. 3rd ed. Englewood Cliffs, NJ: Prentice Hall, 1974.

Requesting Changes to This Guide

Procedure

To request a change to this guide:

1. Send an email message to the Technical Writer that is currently maintaining the Style Guide.
2. Please include the following information in the message:
 - The section of the guide to which the change applies
 - A description of the requested change
 - Any relevant background information
 - Your name and extension

Grammar and Usage

Jargon

Rule

Avoid jargon, buzzwords, and cliches; they can be confusing to some, and do not add value to a document.

Correct

Every two weeks, the executive committee **meets** with the subject matter experts.

The CEO hopes to **increase** business in the future.

Incorrect

Every two weeks, the executive committee **interfaces** with the subject matter experts.

The CEO hopes to **grow** the business in the future.

Nouns

Rules

- Do not turn verbs into nouns or create verbs from nouns.

Correct

Send copies of the agreement and cover letter to the borrower using FedEx.

Incorrect

FedEx the copies of the agreement and cover letter to the borrower.

- Use concrete nouns and active verbs to express the meaning of a sentence.

Correct

Word enables the user to **find** a term in the document **and replace** it with another.

They can **reuse** this material in the next release.

They can use money as **leverage** in the negotiations.

The First American Title Corporation maintains its headquarters in California.

Incorrect

Word enables the user to do a **find-and-replace** in the document.

They can **leverage** this material for the next release.

The First American Title Corporation is **headquartered** in California.

Person

Person in grammar refers to the distinction among the person talking (first person), the person spoken to (second person), and the person, object, or concept being talked about (third person).

Rule

Keep a sentence or related sentences consistent in person.

Plurals

Rules

- Use 's to form a plural in only two instances:
 - For the plural form of letters of the alphabet
 - For the plural form of a word used to refer to the word itself.

Correct

He tends to put two **o's** in the word lose.

You have used too many **but's** in this sentence.

- Form the plural of an acronym by adding an **s** with no apostrophe.

Correct

CPUs
CEOs
DBMSs

Incorrect

CPU's
CEO's (possessive form of singular CEO)

- Form the plural of a single letter by adding an apostrophe and an **s**.

Correct

x's

Incorrect

xs

- Form the plural of a number by adding an **s** with no apostrophe.

Correct

486s
1960s
W-2s

Incorrect

486's

- Do not use "parenthetical plurals" such as "**address(es)**." See **Parentheses**

Possessives

Rules

- Form the possessive of **singular** nouns and acronyms by adding an apostrophe and an **s**. This rule applies even if the noun or abbreviation ends in **s**.

Correct

the manual's search capabilities
the index's structure
Brooks's Law

- Form the possessive of **plural** nouns that end in **s** by adding only an apostrophe.

Correct

The users' suggestions
The girls' locker room
the articles' links

- Form the possessive of **plural** nouns that do **not** end in **s** by adding an apostrophe and an **s**.

Correct

a children's encyclopedia
the women's dresses

- In **compound** words, make only the last word possessive.

Correct

Father-in-law's house (singular possessive)
Mothers-in-law's birthdays (plural possessive)

- In nouns of joint possession, make only the last noun possessive; in nouns of individual possession, make both nouns possessive.

Correct

John and Paul's office (joint possession)
John's and Paul's offices (individual possession)

- It is acceptable to form the possessive of acronyms, but avoid it if possible if the acronym does not refer to people or companies. Either use the company name with no ownership or use an **of** phrase or similar rewrite.

Correct

An OEM's products
The products of OEMs

- Do not use possessives for product or feature names.

Correct

The Windows interface
Microsoft Word templates, or the templates in Microsoft Word
The dictionary in the spell checker
The **Send** command on the **File** menu

Incorrect

Windows's interface
Microsoft Word's templates
the spell checker's dictionary
the **File** menu's **Send** command

Possessives for Company and Organization Names

- It is acceptable to form the possessive of company names.

Correct

The First American Title Corporation's benefits program

- Form the possessive of a **company or organization name** by adding an 's if the name does not end in an s. If the name ends in a s, only an apostrophe is added.

Correct

The Bank of Virginia's trust department

- When referring to a department that is part of another business unit, use the possessive form of the business unit.
- Use the possessive form when referring to borrowers or associates.
- If a possessive results in an awkward sentence, rewrite the sentence.

Correct

As an employee of First American Title Corporation, it is important that you conduct business with your fellow workers, customers, and suppliers with honesty and integrity.

Incorrect

As an employee of First American Title Corporation, it is important that you conduct business with your fellow workers, customers, and suppliers with honesty and integrity.

Pronoun and Antecedent Agreement

Rules

- As a rule, a pronoun and its antecedent (the word the pronoun refers to) agree in number.

Correct

Singular: An **author** may enjoy autographing **his** books.

Plural: Many **authors** enjoy autographing **their** books.

- As a rule, use a singular pronoun to refer to such antecedents as each, either, neither, one, anyone, everybody, a person.

Correct

Each person has **his** day in court.

Incorrect

Each person has **their** day in court.

- The correct pronouns to use when referring to an organization is "it" and "its," not "they" or "their."

Correct

The Risk Assessment Department recently changed **its** name to the Appraisal Department.

Incorrect

The Risk Assessment Department recently changed **their** name to the Appraisal Department.

- **This** and **that** are singular and must be used to modify singular nouns. **These** and **those** are plural and must be used to modify plural nouns.

Correct

I don't like **this kind** of book. [or these kinds of books]

She prefers **those types** of pencils. [or that type of pencil]

Incorrect

I don't like **these kind** of books.
She prefers **those type** of pencils.

Smothered Verbs

Overview

In business writing, nouns are used in many situations where a verb would be shorter and easier to read. Look at the examples of "smothered verbs" in this topic, and try to avoid them.

Rules

When you see a "smothered verb" (noun form)	Use an active verb instead
make a choice	choose
make a decision	decide
make a recommendation	recommend
take into consideration	consider
take notice of	notice
to conduct an investigation	Investigate
to give assistance	help

Subject and Verb Agreement

Rules

- A singular subject requires a singular verb, and a plural subject takes a plural verb.

Singular: The baby in the stroller looks healthy. [baby looks]

Plural: The babies in the stroller look healthy. [babies look]

- Collective nouns and phrases denoting a fixed quantity take a singular verb when they refer to the group as a unit and take a plural verb when they refer to individuals or parts of the group. (The subjects of the sentences below are underlined.)

Singular (regarded as a unit)

The number of errors found was surprising.

My family has its traditions.

The couple was scheduled to arrive on Sunday.

Two-thirds of the fund-raising goal has been met.

Plural (regarded as individuals or parts)

A number of errors were discussed.
The family are all attending different churches.
A couple of cups of coffee invigorate me.
Two-thirds of the cookies have been eaten.

Note: With "a number of," or "a total of," use a plural verb. With "the number of," or "the total of," use a singular verb.

Tense

Rules

Present Tense

- Use the present tense wherever possible. Hypotheses, principles, theories, facts and other general truths are expressed in the present tense.
- Avoid using the conditional **could** or **would** and invoking the future tense needlessly, because these uses add an unnecessary sense of indefiniteness to a statement.

Past Tense

- Use the past tense to describe results and outcomes. Research reports are written in the past tense because they describe work completed in the past.

Future Tense

- Avoid using the future tense except where appropriate; for example, to describe an upcoming event.

Tone of Documentation

Overview

The tone or writing style of the online documentation should be in **general English**. It falls in the middle of the spectrum ranging from informal to formal English. General English comprises plain, straightforward language, which communicates more effectively than complex language.

General English

General English follows standard grammatical conventions. Most sentences are simple or compound; seldom are sentences longer than 25 words. Complex and

compound-complex sentences appear infrequently. The vocabulary favors common straightforward words rather than more obscure words or nominalizations. (A nominalization is a noun formed from a verb, used in a phrase such as **make reference to...** rather than **refer to**).

General English example

Some people who browse Web pages turn off the display of graphics and videos so they can browse the World Wide Web more quickly.

Formal English

Formal English uses more long complex sentences and complete grammatical constructions. Passive voice appears often, as to technical terms and nominalizations. Sometimes a writer can lose track of correct grammar (for example, subject-verb agreement) in convoluted formal English sentences.

Formal English example

Certain individuals who browse through World Wide Web pages turn off the display of multimedia such as graphics and videos, which enables them to navigate through the Web more expediently.

Informal English

Informal English is breezy and journalistic. It's marked by short sentences and contractions, and often directly addresses the user. Some grammatical constructions may not be complete. Some attempts to be informal can sound condescending or unprofessional.

Informal English example

You can turn off graphics to surf the Web faster.

Voice

Rules

- Whenever possible, use the active voice, in which action is expressed directly; the subject is doing the acting.
- Avoid the passive voice except when necessary to avoid a wordy or awkward construction.
- Use the active voice for column headings in tables that list user actions.

Active

The consultant **directed** the activity.

Passive

The activity **was directed by** the consultant.

Wordiness

Overview

Many procedures and other topics suffer from wordiness. Review your work, and try to trim unnecessary words. The following table lists common wordy expressions (especially those in boldfaced type) and shorter versions.

Reduce these	To these
a certain length of time	a certain time
advance planning	planning
after the conclusion of	after
am (is, are) going to	shall, will
are (am) of the opinion	believe
as a result of	because
at all times	always
at the present time at this point in time	now
before long	soon
both alike	both
by means of	by
by the time	when
come in contact with	meet
destroyed by fire	burned
due to the fact that	because, due to, since
during the month of May	in May
during the time that	while
or the amount of	for
for the purpose of	for
for the reason that	because
has the capability of working	can work
in accordance with	by
in as much as	since
in case	if
in connection with	with
in lieu of	instead
in order to	to
in regard to	about
in so far as	because, since, as
in the event that	if
in the month of May	in May
in the nature of	like
in this day and age	today
in view of the fact that	since
it has come to our attention that	(begin with the word following that)
it is interesting to note that	(begin with the word following that)
it should be noted that	(begin with the word following that)
I would appreciate it if	please
of an indefinite nature	indefinite
of great importance	important

on a timely basis	fast
on a (weekly, monthly, yearly) basis	weekly, monthly, or yearly
on condition that	if
one of the purposes (reasons)	one purpose (reason)
prior to	before
provided that	if
the length of five yards	five yards or five yards long
the necessary funds	money
with the exception of	except
until such time as	until

Largely taken from Shaw, Harry. **Dictionary of Problem Words and Expressions**. New York: McGraw-Hill Book Company, 1975.

Hyphenations and Compounds

Hyphens

Overview

- Use a hyphen when [compound adjectives](#) come **before** the noun they modify.

Correct

[third-party](#) authorization
free-form text
pop-up window

Owner-occupied properties are preferred.

- Compound adjectives that are commonly used do not need a hyphen, such as **real estate agent** and **first class mail**.
- Some compound modifiers are **never** hyphenated, such as those with an adverb ending in **ly** and those with comparative or superlative forms.

Correct

swiftly moving water [adverb ending in **ly**]
openly hostile attitude [adverb ending in **ly**]
the **most expensive** house on the block [superlative]

- Hyphenate two words that precede and modify a noun as a unit if the two modifiers are a number or single letter and a noun or participle.

Correct

80-column text card
8-point font

Incorrect

80 column text card
8 point font

- A series of compound words in a sentence that share the same base word can be shortened by the use of suspended hyphens.

Correct

Fixed-rate loans are available for 10-, 15-, and 30-year terms.

- In Loan Origination/Loan Operations documentation, do not capitalize or hyphenate approval levels.

Correct

A level 4 approval is required to remove the stipulation.

Incorrect

A Level-4 approval is required to remove the stipulation.

Guideline

- When documenting a screen element that is hyphenated incorrectly, follow the spelling used in the interface only when referring to the screen element. At all other times, apply the standard rules of hyphenation.

Correct

Click the **Pre-Funding** check box to initiate the prefunding process.

Use of Hyphens with Prefixes

Overview

Consult a recently published dictionary to determine the correct spelling of a word, but also be aware that DataTrace has established style guidelines for some words that can be spelled correctly using alternative forms.

Rules

- Only two prefixes are usually hyphenated: **self-** and **quasi-**.
- The following prefixes and combining forms are printed solid (without a hyphen) **unless** (1) they are combined with a capitalized word or (2) there is a possibility of two meanings or mispronunciation (for example, **un-ionized** and **unionized**, **re-cover** and **recover**, **multiply** and **multi-ply**). Also, a hyphen is sometimes used if the combination results in a double identical vowel (particularly two i's) and is always used if it results in a triple consonant; check a current dictionary to be sure.

Prefixes	without	Hyphens
after	inter	post
ante	intra	pre
anti	intro	pro
bi	iso	pseudo
by	macro	re
co	meso	semi
contra	micro	step
de	mis	sub

Prefixes	without	Hyphens
demi	mono	super
extra	multi	trans
fore	neo	tri
hyper	non	ultra
hypo	off	un
in	out	under
infra	over	

Correct

multicolumn table
 nonborrowing spouse
 nonsufficient funds
 postfunding stipulation
 preapproved loan
 pre-Columbian art (The base word is a proper name, so a hyphen is needed.)
 refund (to return money), **but** re-fund (to fund again)
 subreport
 uninstall

Incorrect

multi-column table
 non-borrowing spouse
 non-sufficient funds
 post-funding stipulation
 pre-approved loan
 preColumbian art (<http://en.wikipedia.org/wiki/Pre-Columbian>)
 re-financing
 sub-report
 un-install

- Hyphens are not needed in foreign phrases used as modifiers unless the phrase is hyphenated in the original language; **laissez-faire** is one of the few exceptions. Many of these phrases are Anglicized Latin words—ad hoc, bona fide, ex officio, and per capita.

Correct

ad hoc reports

Incorrect

ad-hoc reports

Indexing

About Indexing

Overview

This topic describes basic standards for indexes in Data Trace applications.

Rules

- Use lowercase text for main headings and subheadings unless they are proper names.
- Create indented, rather than run-in or paragraph-style indexes.
- Use no more than two levels of subentries.
- Avoid the use of leading prepositions and articles in subentries.
- Place **See** and **See also** references at the bottom of an index entry, rather than at the top (when using software that allows you to control the placement of cross-references).

Guidelines

For indexing style guidelines not addressed by this topic, see the "Indexes" chapter in **The Chicago Manual of Style**, 15th edition (see [Recommended References](#)).

Lists

About Lists

Overview

The following types of lists are used in Data Trace documentation:

- Ordered lists
- Unordered lists
- Multicolumn lists

Note: The definition list <DL> and definition term <DT> HTML tags are not supported in RoboHelp; therefore, these tags are not used by Data Trace. If your topics require a list of terms and definitions, refer to the **Definition Lists** topic for rules on style and formatting.

Rules

- Use numbers or letters for ordered list items.
- Use bullets for unordered list items.

- Capitalize the first word of each list item in an ordered or unordered list whether the item is a complete sentence or not.
- Except in procedure steps, avoid using vertical lists for only two items.
- Use parallel structure for all items in a given list.
- In list items, use all complete sentences or all sentence fragments; avoid mixing the two in a given list.

Where to use lists

- **Do** use lists in rules and guidelines topics for multiple items.
- Do **not** use lists in rules and guidelines topics for a single item.
- Do not **begin** the overview section of a topic with a vertical list.
- **Do not** use lists for anything in the Heading 3 style.
- **Do** use lists, where appropriate, for information below a Heading 3 style.

Using Ordered and Unordered Lists Together
Unordered list
Ordered list
Mixed unordered and ordered lists
Exception

Definition Lists

Overview

A definition list consists of a term and a definition or an explanation.

Rules

- if the term being defined is a field name, format the term in boldfaced font.
- Format all other terms in normal font (not bold).
- Separate the term from the definition with an em dash. Do not type spaces around the em dash.
- Begin the definition or explanation with a lowercase letter (unless the word is a proper noun).
- End the definition with a period only if the definition or explanation is a complete sentence.

Correct

Administrative assistants should familiarize themselves with

- Associate Handbook—employment issues
- Administrative Guide—general administrative tasks

There are two types of loan modifications:

- Advance and defer—a portion of the delinquency is advanced and deferred.
- Step rate—when the debt-to-income ratio is more than 55%, the interest rate is lowered to bring the debt-to-income ratio down to the AMC Mortgage Services underwriting requirements.

Incorrect

The following are the current AMISC insurance vendors:

- **ACE INA:** Disaster mortgage protection insurance plans.
- **American Home Shield (AHS):** Home warranty insurance plans.
- **Monumental Life:** Life and disability insurance plans.

Multicolumn Lists

Rules

- Use a multicolumn list to group similar items; for example, a list of keywords.
- Review these differences between multicolumn list and a table.
- Use an unordered list for six or fewer items and a multicolumn list for seven or more.
- Items in a multicolumn list need not be capitalized.
- If the list is alphabetical, alphabetize down the columns, not across rows, if possible.
- Because HTML does not support columns, multicolumn lists take the form of a table, with or without a heading row.

Multicolumn List Example

Common Measurements
Distance
Temperature
Volume
Size
Weight

Punctuation of List Introductions

- After the infinitive phrase introducing procedure steps, use a colon.

Correct [Infinitive phrase introducing procedure steps; Data Trace style requires a colon]

To process a Western Union payment:

1. Download the Quick Collect Client Web File each morning for the previous day.
2. Reformat and save the file.
3. . . .

- If the words introducing a list include the phrases **as follows, the following,** and similar expressions, end the introduction with a colon.

Correct [List introduction includes "the following"; use a colon.]

The database includes the following:

- Reports
- Forms
- Tables
- Modules

- If the words introducing a list constitute a **complete sentence**, end the introduction with a colon **or** a period.

Correct

Pick up the payoff request:

- If it is an internal payoff request, retrieve the request from the designated payoff printer.
- If it is faxed or a mailed request, retrieve from the bin.
- If it is an internal payoff request, retrieve the request from the designated payoff printer.
- If it is a faxed or mailed request, retrieve the request from the bin.
- If the words introducing a list (other than an infinitive phrase) do **not** constitute a complete sentence, it is always correct to use no punctuation at all, but you may also use a colon. See the Important note below for an explanation of times when a colon should be avoided.

Correct [List introductions are not complete sentences or infinitive phrases.]

The closing agent

- Facilitates the closing of a loan
- Ensures the loan documents are properly prepared and signed
- Ensures that the mortgage, deed of trust, or security deed and any riders are recorded and funds are properly disbursed

The closing agent:

- Facilitates the closing of a loan
- Ensures the loan documents are properly prepared and signed
- Ensures that the mortgage, deed of trust, or security deed and any riders are recorded and funds are properly disbursed

The database includes [Omitting a colon here is correct grammar.]

- Reports
- Forms

- Tables
- Modules

Incorrect

The database includes:

- Reports
- Forms
- Tables
- Modules

Note: The rules of grammar state that a colon should **not** be placed between a verb and its objects **or** a preposition and its objects. In the last example above, the colon is incorrect because it separates the verb "includes" from its objects.

Punctuation of List Items

- Always capitalize the first word of each list item whether the item is a complete sentence or not.
- End list items with a period if they are complete sentences.

Correct [List items are complete sentences; end each with a period.]

1. Ask the Cashiering Department supervisor to unlock the Western Union printer cabinet.
 2. Tear off any checks that have been printed.
 3. Lock the Western Union printer cabinet.
 4. Detach the remittance section from the check.
- End list items **without any punctuation** if they are fragments (not complete sentences).

Correct [List items are fragments; do not use ending punctuation.]

The following services are provided:

- Explanations about preliminary title
- Clarification on clearing open title exceptions
- Information about state-specific requirements
- Information about requirements for vesting changes

Incorrect

Complete a Collateral Memo (schedule of loans to be shipped) with the following:

- Number of boxes,
- Number of collateral packages,
- "Attention to" information (from FedEx label),
- Reference number (from the custodian log), **and**
- Transmittal number.

Misused Words

List of Misused and Easily Confused Words

Overview

This topic lists English words and phrases that are often misused or confused with other words or misspelled. Click a word or phrase for more information.

affect, effect	can, may, might	impact	onto, on to
among, between	cancel, cancelled, canceling, cancellation	in, into	preventative, prevent
and/or	comprise, compose	in order to	principal, principle
appear, display	data	irregardless	that, which
appraise, apprise	different	its, it's	that, who
as, because, since	done, finished	judgment	their, them
as, like	entitled, titled	matrix, matrices	then
assure, ensure, insure	etc.	more than, over	utilize, utilizing
auto-populate	fewer, less, under	off, off of	via
back up, backup	grow	on	who, whom
calendar	if, whether	once	

List of Words with Specific Style Guides

Overview

This topic lists specific words or phrases for which the Information Design Department has established a style preference for information designers to follow. Click a word or phrase for more information.

access	input
approval levels	Internet, intranet
barcode	off-site
cc:	offline
email	on-site
enter, type	online
fax, facsimile	screenshot
file name	Social Security number
following	Web, Webmaster, Web page, Web site
inbox	

Naming Conventions

Boldfaced and Underlined Text

Rules

- Use boldfaced text for the following items:
 - Names of screens, windows, and panels
 - Names of Web sites and Web pages
 - Names of user interface elements (such as menus, commands, options, buttons, and check boxes)
- Exception:** When field names appears in an Action/Explanation table, do not format the field name in bold.
- User input (specific text that users type in fields)
 - Emphasis (but limit its use for this purpose)
- In online documentation, use boldfaced text instead of italics for items that are normally italicized, such as book or manuscript titles.
 - If boldfaced text ends with a colon, make the colon boldfaced as well.
 - Do not use boldfaced text for field names used in tables.
 - In tables, apply the HeadingTable style to the header row. The HeadingTable style formats the text in boldfaced font.
 - Do not use boldfaced text for the following items (unless they are used in a heading or subheading):
 - Names of First American Title Corporation, affiliates, divisions, and departments
 - Job titles
 - File names
 - Names of documents, forms, reports, database queries, or database tables
 - Names of computer systems and software products
 - Names of online guides, such as the Associate Handbook
 - Do not use underlining in regular text; only hyperlinks should be underlined.

Correct

On the **File** menu, click **Save**. [names of interface elements]
When prompted for the password, type **newuser**. [user input]
After modifying the file, save it under a **different** file name. [emphasis]
Refer to the **Chicago Manual of Style**. [name of book in online document]

Field	Action
Warehouse Line	Select a warehouse line.
Confirmation	Select Dry .

Document Conventions

Data Trace has adopted a standard set of rules and guidelines designed to help information designers write online documentation that is consistent in style and usage.

Rules

Item	Convention	Examples
Accessory programs in Windows	Title caps	Notepad, Paint, WordPad
Acronyms	Usually uppercase	asap!, AVM, bps, CFO, REO
Book titles	<ul style="list-style-type: none"> • Bold • Title caps • No italics 	The Chicago Manual of Style
Commands on menus and buttons	<ul style="list-style-type: none"> • Bold • Capitalization follows user interface 	Date and Time; Options; Tabs (Windows example) In TASKID, type FNTFOR, then press Enter. (mainframe system example)
Dialog box (window) buttons	<ul style="list-style-type: none"> • Bold • Capitalization follows interface • Use only the name of the button; do not write button after the name 	Click Close all programs and log on as a different user? Click OK.
Dialog box (window) titles	<ul style="list-style-type: none"> • Bold • Title caps • Refer to as window 	Protect Document window; Import/Export Setup window
Error message names	<ul style="list-style-type: none"> • Bold • Title caps • Refer to as error message 	General Protection Fault error message
File Extensions	All lowercase	.chm; .doc; .mdb; .pdf
Field names	<ul style="list-style-type: none"> • Bold • Capitalization follows user interface 	In TASKID , type FNTFOR , then press Enter . (mainframe system example)

File names	<ul style="list-style-type: none"> Title caps (internal caps in short file names are acceptable for readability) If a file name includes a variable, type angle brackets <> around the variable element, and format the angle brackets and the variable element in italic font 	Fee Matrix <MMDDYY>.xls Msacc20.ini SLA_InsuranceDept_<Year>.doc
Folders (Windows) and path names	<ul style="list-style-type: none"> Bold Title caps If a folder name includes a variable, type angle brackets <> around the variable element, and format the angle brackets and the variable element in italic font 	My Documents folder
Form names	<ul style="list-style-type: none"> Title caps Do not capitalize "report" or "request" unless it is part of the form name 	Collateral Package Audit Checklist/Stacking Order
Icon names	<ul style="list-style-type: none"> Bold Title caps 	Recycle Bin icon In Control Panel , click the Add New Hardware icon.
Menu names	<ul style="list-style-type: none"> Bold Title caps 	Insert menu
New terms or emphasis (italics do not show up well online, so use bold for new or emphasis)	<ul style="list-style-type: none"> Bold 	Microsoft Exchange consists of both server and client components.

		You must close the window before you exit.
Online guide names	<ul style="list-style-type: none"> • Initial caps • No bold 	DTS 2.0 User Manual
Programs and applications, including utility and accessory programs	<ul style="list-style-type: none"> • Usually title caps • No bold • Check Microsoft Trademark List for other styles of capitalization 	Microsoft Word Notepad Adobe Acrobat
Report names	<ul style="list-style-type: none"> • Title caps • Do not capitalize "report" unless it is part of the report name 	Check Request Total Report by Vendor
Screen titles	<ul style="list-style-type: none"> • Bold • Title caps • Refer to as screen 	the SER1 screen
System and software product names	<ul style="list-style-type: none"> • Usually title caps • No bold unless in a heading or subheading 	Microsoft Excel
Toolbar button names	<ul style="list-style-type: none"> • Bold • Usually title caps; follow the interface 	Format Painter Insert Microsoft Excel Worksheet
URLs	<ul style="list-style-type: none"> • All lowercase within parentheses • Include the protocol (such as https:// and ftp://) • Break long URLs before a forward slash, if necessary to break <ul style="list-style-type: none"> • Do not 	(http://www.google.com) (http://www.onelook.com)

	hyphenate	
User input	<ul style="list-style-type: none"> • Bold • Usually lowercase, unless case-sensitive or to match standard capitalization conventions 	In Password, type newuser.
Web site and page names	<ul style="list-style-type: none"> • Bold • Title caps 	IT Information Center eWorkforce Google
Windows, named	<ul style="list-style-type: none"> • Bold • Title caps 	Help window
Windows, unnamed	<ul style="list-style-type: none"> • All lowercase • No bold 	document window
Wizards (in Windows)	<ul style="list-style-type: none"> • Bold • Title case • Do not follow "Wizard" with the word "window" 	The New Project Wizard opens.

Numbers

About Numbers

Overview

This topic describes basic guidelines for spelling out numbers or using numerals. The trend is toward using numerals whenever they can be justified, especially in technical and business writing. (In nontechnical or "humanistic" copy, the guidelines are different.) Other topics in this section describe how to use numbers in specific cases, such as dates, time, telephone numbers, addresses, and units of measure.

Rules

- Spell out zero to nine.
- Use numerals for 10 and above.
- Numbers that begin a sentence or list item are spelled out (see exception described in table below).
- Ordinal numbers are treated the same as cardinal numbers. Spell out first through ninth. Use figures for 10th and above.

The following table (drawn from **The New York Public Library Writer's Guide to Style and Usage**), explains basic rules for whether to spell out numbers or use numerals. It also lists examples and exceptions:

Number Style Quick-Reference Guide
Spell out numbers zero to nine.
If three payments are due for the loan, but only two payments are received, process the payments.
Snow White had seven dwarfs.
Ordinal numbers for first to ninth.
The Riverside branch placed first in the Quality Circle rankings.
Process the report on the third of the month.
Exceptions
With numbers nine and below grouped for comparison in the same sentence or paragraph with numbers 10 and above:
3 of 21 students 9th and 12th grades
With numbers preceding units of measure, symbols, and abbreviations:
6.25% 5-inch border 8°C 4 MB RAM 5-mg dose 5 basis points (bps) level 3 approval or above

With names of parts of books, series, tables, and similar items:

chapter 2
volume 7
row 9
grade 3
figure 6

With percentages, mixed fractions, decimals, ratios, and table coordinates:

1%
2½ years
1.3 times
2 to 1 (ratio)
row 3, column 4

With ages:

7-year-old house
3-year-old child
9 years old

With sums of money:

\$5
\$5.25
\$7 million

With dates and times:

6 hours
2 days
3 weeks
appraisals more than 6 months old
January 25, 1944
30-year-fixed mortgage
21st century
But two centuries, five decades

- Do not add **ly**, as in firstly, secondly.
- Represent numbers taken from examples or system interfaces **exactly** as they appear in the example or interface.

Dates

Rules

- Within text do not spell out the numbers in dates; write them as figures. See the Comma topic for information about punctuating dates in text.

Correct

The next training session begins June 4.
The proposal is due August 9, 2007, and the bidders' conference will be held the following week.

Incorrect

The next training session begins 06/04/2007.
The proposal is due on August ninth, 2005, and the bidder's conference will be held the following week.

- Use cardinal numbers for dates. Use ordinal numbers **only** when the specific month is not named, as in the second and third correct examples.

Correct

The meeting is scheduled for **April 1**.
The supervisor generates the Past Sales report on the **fifth** day of each month. (Since this date is a number under 10, spell out the ordinal number.)
The supervisor generates the Future Sales report on the **15th** day of each month. (Since this date is a number over 10, do **not** spell out the ordinal number.)

Incorrect

The meeting is scheduled for **April 1st**.

- When a date consists of the month and year only, no comma is needed.

Correct

The guidelines were established in the March 2005 bulletin.

- Use a slash (/), rather than hyphens, in date formats such as MM/DD, MM/YY, MM/DD/YY, and MM/DD/YYYY.

Correct

03/04/05

Incorrect

03-04-05

- In the MM/DD/YY, MM/DD/YYYY, and similar date formats, always use **two digits** for the month and day, even if they are less than 10.

Correct

03/04/05

03/04/2005

Incorrect

3/4/05

Percentages and Fractions

Rules

- For percentages, use figures and the percent sign.

Correct

6.25% APR
10%

- Use figures to express ratios, proportions, and odds.

Correct

The base loan-to-value (LTV) ratio is **90%**.
The horse was favored by odds of **9** to **1**.

- Common fractions used alone, without a whole number preceding, are usually spelled out. Such common fractions include

Correct

one-half
three-quarters
one-eighth
two-thirds

- The suffixes **-nds** and **-ths** are unnecessary.

Correct

3/8 inch
9/32 inch
7/16 inch

Incorrect

3/8**ths** of an inch
9/32**nds** inch
7/16**ths** inch

- Use figures with decimal fractions.

Correct

The typical American household has **1.9** persons.

- Use the singular when fractions and decimals of one or less are used as adjectives.

At first glance, saying **.8 tons** may seem correct. But .8 ton is a decimal representation for eight-tenths, or four-fifths. Four-fifths is less than one, and when there's one or less of anything, it's singular, not plural. One would not say **half a tons**.

Correct

0.9 **pound**
0.3 **centimeter**
0.44 **cubic foot**
 $\frac{1}{4}$ **mile**

Punctuation with Numbers

Rules

- In general, use commas in numbers that have four or more digits.

Correct

1,024 bytes
1,273 units

- When designating years and baud rates, however, use commas only when the number has five or more digits.

Correct

10,000 B.C.
9600 baud
14,400 baud

- Do not use commas in page numbers, addresses, or decimals.

Correct

page 1091
1100 Town & Country Road
1.06377 units

- Hyphenate compound numbers when they are spelled out.

Correct

Twenty-five fonts are included.
The forty-first user encountered problems.

- For negative numbers, use an en dash, rather than a hyphen: **-79**
- When two numbers in different clauses are separated only by a comma, write one as numerals and the other as words.

Correct

When the count reaches 6,420, four hundred and twenty units will be recalled.

Incorrect

When the count reaches 6,420, 420 units will be recalled.

Ranges of Numbers

Rules

- Although it is always preferable to use the words "through" or "to" with dates, times, and dates of the week in text, [en dashes](#) are sometimes used, especially in lists, tables, or other kinds of displayed information:

Preferred

\$5 to \$20
from pages 38 through 45
9:00 a.m. to 3:00 p.m.

Acceptable where space is tight

\$5-\$20
pages 38-45
9:00 a.m.-3:00 p.m.

- Do not use **from** before a range indicated by an **en dash**.

Correct

1985-1990

Incorrect

from 1985-1990

- Avoid using **between** or **and** to describe an inclusive range of numbers because it can be ambiguous.

Correct

from 9 through 7

Incorrect

between 9 and 17

Telephone Numbers

Rules

- Use parentheses, not a hyphen, to separate the area code from the seven-digit phone number.
- Use a hyphen to separate the final seven digits into groups of three and four.
- For telephone extensions, separate the telephone number from the extension with a comma and a space. Type the abbreviation **x**, rather than **Ext.** or **Extn.**
- Do not precede the area code with a **1**.

Correct

(714) 541-9999, x15712
(800) 430-5262

Incorrect

303-823-8500
303.823.8500
(714) 541-9999 Ext. 15712
1-(800)-555-0123
1-800-555-0123

Time

Rules

- Use numerals to indicate the time of day. In most cases, express time using a 12-hour clock (rather than a 24-hour clock). Include minutes when showing times followed by a.m. or p.m.

Correct

8:15 a.m.

4:30 p.m.

- When referring to 12 a.m. or 12 p.m., eliminate confusion by specifying 12:00 noon or 12:00 midnight.
- The names of time zones should be treated as proper nouns. A time zone is a geographical area.

Correct

Eastern Time
Pacific Time

Incorrect

eastern time
Pacific time

- Avoid specifying standard time and daylight time, which refer to clock settings within a time zone at specific times of the year, unless you are referring to an event, such as a Webcast, for which this information is important.

Incorrect

Central **Daylight** Time
eastern **standard** time

- Do not abbreviate the names of time zones, such as PT and ET, unless space is severely limited.

Units of Measure

Rules

- Use numerals for all measurements, even if the number is under 10, whether the measurement is spelled out, abbreviated, or replaced by a symbol.
- Units of measure include units of distance, temperature, volume, size, weight, points, picas, and time (such as hours, days, weeks, and years).
- Percentages and basis points are considered units of measure as are bits and bytes.

Common Measurements
Basis points
Bits and bytes
Distance
Percentages
Points and picas

Correct

25 basis points (bps)
6%
0 inches
3 feet, 5 inches
3.5-inch disk
5 weeks
6 months
0.75 gram
35mm camera
8 bits
1-byte error value

- Ages of people and things are usually expressed in figures.

Correct

3 months old
7-year-old home

- Place a hyphen between a number and unit of measure when they modify a noun. The hyphens make it clear that the numbers modify the units of measure, not the nouns.

Correct

2-week-old culture
15,000-volt charge
12-inch-long ruler

Incorrect

12 inch long ruler
12-inch long ruler

- Use numerals in **dimensions**.
- In most text, spell out **by**, except for screen resolutions; for those, use the multiplication sign (\times).

Correct

8.5-**by**-11-inch paper
600 \times 800 screen resolution

Procedure Writing

Commands

Rules

Use the following syntax for Windows **commands**.

When you want the user to	Use this syntax
Carry out a command from a program menu	On the Tools menu, click Address Book .
Carry out a command from a program menu	On the Tools menu, click Address Book .
Carry out an action from a window reached from a menu command	On the Tools menu , click Language > Hyphenation . The Hyphenation window opens. Select the Automatically hyphenate document check box.
Carry out a command from a window	Click Apply .
Carry out a command from a submenu	Click the Start button, point to Documents , and then click the desired document. Click Start > Programs > Windows Explorer .

File Names and Folders

Overview

Many topics refer to files saved in network folders. File names and folder names may include variables, such as months or years.

Rules

- To enhance readability, display folder names and file names on separate lines.
- Type two manual line breaks (**Shift+Enter**) to insert vertical space between the procedure step and the folder name.

Note: Manual line breaks maintain the numbering on subsequent steps.

- Type the word **Folder:** in boldfaced font. If required by your clients (Loan Servicing and Special Servicing clients expect it), type the drive letter followed by a colon and the word **drive**.
- Type a backslash character \ between each folder.
- At the end of the folder path, type a backslash character \.

Example:

(S: drive): \\corpdata10\retail\ORGDEV\IDD\Templates\

- If appropriate, create a hyperlink to the folder.
- Type a manual line break (**Shift+Enter**) at the end of the folder name to create a new line.
- Type the words **File name:** in boldfaced font, followed by a colon.
- Type the file name and the file extension.
- If any part of a folder or file name includes a variable, type angle brackets <> around the variable name. Format the angle brackets and the variable name in italic font.
- When a folder or file name includes a variable, provide an example. Type two manual line breaks, and then type the word **Example:** in boldfaced font. Type the full folder path and file name, including file extension. In the example, replace each variable with a reasonable value.

Correct

1. Open the State Procedure Matrix Excel file.
Folder (N: drive): \\corpdata06\lshare\Shared Apps\Finance-SharedServices\AllSSMatrix\
File name: State Procedure Matrix.xls
2. Save the results.
Folder (S: drive): \\corpdata10\lerv\CSSupport\Daily Balancing*<Year>**<Month>*\
File name: Daily Bal *<MM-YY>*.xls

Example: \\corpdata10\lerv\CSSupport\Daily Balancing\2006\10\Daily Bal 10-06.xls

Guideline

Use your best judgment when defining variable names. For example, *<Year>* is reasonable to identify a year; *<XXXX>* is not.

Multiple-action Procedure Steps

Overview

A multiple-action procedure step is one that requires users to complete two or more short actions.

Rules

- As a general rule, set individual steps as separate, numbered entries; however, short steps can be combined if they occur in the same place (within one screen or window, for example).
- Use the greater than sign > for long navigation sequences through cascading menus. Use this technique only if the navigation is obvious to any new user of the application.
 - Long navigation sequences are two or more clicks within a single application.
 - Place a space on either side of the > to facilitate line breaks.
 - Use boldfaced text for the entire sequence.
 - Optionally, include a screenshot (using the ImageLink style) of the menu to clarify the navigation steps.

Correct

On the PeopleSoft Menu, click General Ledger > Journals > Journal Entry > Create Journal Entries.

On the **Tools** menu, click **Language > Hyphenation**. The **Hyphenation** window opens.

- Do not combine menu and tab options in long navigation sequences.

Correct

1. On the **Tools** menu, click **Options**.
2. On the **Options** window, click the **Edit** tab.

Also Correct

On the **Tools** menu, click **Options**, and then click the **Edit** tab.

Incorrect

On the **Tools** menu, click **Options > Edit**.

- When describing several short steps in one sentence, do not use a semicolon

Correct

On the **File** menu, click **Generate**, and then click **WebHelp**.

Incorrect

On the **File** menu, click **Generate**; then click **WebHelp**.

- When writing complex steps that need more explanation, create a drop-down hotspot in the **ViewHideDetails** style.

Example of a DHTML drop-down hotspot, with expanded steps visible

1. In Empower, open the **Loan Summary** window. view/hide details
 - a. With the loan open, click **Underwriting** from the workflow, and then click **Loan Summary**.
 - b. Double-click **Loan Summary** from the right pane. The **Loan Summary** window opens.

Procedure Style

Rules

- Avoid references to the names of specific individuals and their telephone numbers and extensions in procedures; instead, refer to the department name.
- Follow interface capitalization. Usually, menu and command names use title caps. Capitalization of window options varies. If in doubt, or if necessary for consistency, use sentence-style capitalization.

Correct Windows example

1. Click **Date and Time**.
2. Select the **Provide feedback with sound** check box.

Correct mainframe example

1. Go to the MSP **TSK1** screen.
 2. In **TASKID**, type **FNTFOR**, and then press **Enter**. The **TSK1** screen opens.
 3. In **ACT**, type **A**, and then press **Enter** to order tax information.
- If a command name of a dialog box option ends with a colon or ellipsis, do not include this punctuation.

Correct

Click **Save As**.

Incorrect

Click **Save As...**

- Limit the use of the descriptors **button** and **option button**, except where the descriptor helps to avoid confusing or awkward phrasing or is necessary to avoid confusion with another element.

- Use **bold** for user input and regular type for descriptors. User input can be on the same line as the procedural step, or it can be displayed on a new line. If the input is on the same line, what the user types should be the **last** word or words of the step and **should not be followed by end punctuation** unless the user needs to type the end punctuation.

Correct

Type the user password.

In the **Date** box, type **April 1**.

In the **Date** box, type the following:

April 1

Procedure Syntax

Rules

- As a general rule, tell users where the action should take place before describing the action to take. This practice prevents users from doing the right thing in the wrong place; however, avoid overloading procedures with "locators."
- Assume that the user is looking at the screen and is starting from the position where the procedure begins. For example, the following phrasing is typical: On the **View** menu, click **Zoom**.
- Use the greater than sign > for long navigation sequences through cascading menus. Use this technique only if the navigation is obvious to any new user of the application.

Folders and icons

- Users **click** or **double-click** a folder or an icon to initiate an action; for example, starting a program or viewing a list of subfolders.

When you want the user to	Use this syntax
Activate a program icon that is already running on the desktop	Click the Microsoft Excel button on the taskbar. Switch to Microsoft Excel .
Select an icon before changing its properties, moving it and so on	Right-click the PowerPoint icon, and then click Properties .
Choose a Control Panel icon	In Control Panel , double-click the Printers icon.
Choose any other icon, such as a folder icon, drive icon and so on	Double-click the Recycle Bin icon.

Tables in Procedures

Use tables in procedures to organize field information and to make the procedures user-friendly.

Rules

- Use a table in procedure steps to describe screens with two or more fields.

Correct

Use the following table to type the relevant information in each field.

Field	Action information
STAT	Type A , indicating that the status is active.
TEMPLATE	Type LMOFF .
PROC	Type the processor's code that identifies the Home Retention specialist.
STAGE	Type the appropriate pending code. Note: The Home Retention specialist changes the STAGE code only when the file is approved. If the file is declined, or upon completion or cancellation, the Home Retention specialist closes the file in the workstation with the applicable removal code.

- To avoid long tables, chunk the data. Many screens and windows display fields in group boxes; these group boxes provide logical break points. When a screen has three or more group boxes, describe each section in a separate table.

Correct

- Update the **Update My Current Tasks** page of Project Manager.
 - Complete the fields in the **Task section**.

Field	Action information
Deadline	Click the appropriate date on the calendar, and then double-click the Done field to copy the selected date into the field.
Est Hrs	Type the estimated number of hours in the Est Hrs field.
Late Reason	Type a description if the task is late in the Late Reason field.
Description	Type a description of the task in the Description field.

- Complete the fields in the **Goals section**.

Field	Action information
Week	Select the date from the Week drop-down list.
Done	Click the appropriate date on the calendar, and then double-click the Done field to copy the selected date into the field.
Completed Stage	Select the stage from the Completed Stage drop-down list.
Goal	Click the appropriate date on the calendar, and then double-click the Goal field to copy the selected date into the field.
Goal Stage	Select the stage from the Goal Stage drop-down list.

- Complete the fields in the **Reviews section**.

Field	Action information
Reviewer	Type the reviewer's name in the Reviewer field.
Due	Click the appropriate date on the calendar, then double-click the Due field to copy the selected date into the field.
Approved	Click the appropriate date on the calendar, then double-click the Approved field to copy the selected date into the field.
Notes	Type notes related to the review in the Notes field.

Punctuation

Apostrophe

Rules

- use apostrophes to form the possessive case of nouns and to indicate a missing letter in a contraction.
- Form the possessive case of a singular noun by adding an apostrophe and an **s**, even if the singular noun ends in **s**, **x**, or **z**.
- Form the possessive of a plural noun by adding an apostrophe after the final letter.
- Do not use possessives for product or feature names.

Correct

the index's structure

Data Trace's property

an OEM's product

all of the software modules' features.

the features in **Word**

Incorrect

Word's features

all of the software modules's features.

Brackets

Rules

- Use brackets for parentheses within parentheses.

Correct

This format has been superseded by another (see ABC Manual of Style [Revised Edition], pp. 46–72).

Incorrect

This format has been superseded by another (see ABC Manual of Style (Revised Edition), pp. 46–72).

- Use brackets to enclose editorial interpolations, corrections, explanations or comments in quoted material.

Correct

Despite evidence brought to light [by the recent study], they continued on course.

They were certain that everyone [who was interested] would attend.

Incorrect

They were certain that everyone (who was interested) would attend.

Colon

Overview

A colon is a mark of introduction. It can precede a quotation, a list, an explanation, or a main clause.

Rules

- Use a colon after an infinitive phrase introducing procedure steps. (This use of the colon after a phrase, rather than a complete sentence, is a Data Trace style decision.)
- Use a colon after a **complete sentence** that introduces a list.
- A colon is normally used after **as follows**, **the following**, and similar expressions.
- If the introduction to a list is **not** a complete sentence or an infinitive phrase introducing procedure steps, do **not** use a colon.
- A colon is **incorrect** before a series introduced by a verb or a preposition. (A colon should never come between a verb and the rest of the sentence, and between a preposition and its object.)
- A colon is **incorrect** after words like **including**, **namely**, **for example**, and **such as**.

Correct [colon follows a complete sentence]

Audit the checks against the Interest Adjustment Checks Issued Log:

- Verify check amounts.
- Verify the number of checks.
- Highlight any day differences greater than 15 days.

Incorrect [colon appears between the verb will and the rest of the sentence]

To issue interest adjustment checks, the Shipping Department associate will:

1. On the **Shipping** tab of the Empower toolbar, click the **Interest Adjustment** icon.
2. In **Branch Manager Signoff Date**, type the appropriate date.

Incorrect [colon should not appear between the preposition for and its objects]

The Postfunding Group is responsible for:

- Using the Funded Loans with Outstanding Stip 99999 Report to monitor stipulations
- Clearing exceptions
- Researching stipulations
- Obtaining additional information from the originating branch
- Working with the funding supervisor on any questionable stipulations
- Do not use a colon to introduce graphics, tables, or sections.
- Use colons sparingly; do not overuse them.
- Use only one space after a colon.
- When boldfaced text appears before a colon, use bold for the colon as well.

Capitalizing after a Colon

- After a colon, capitalize the first word if the clause is a complete sentence, and lowercase the first word if the clause is a fragment.

Correct

Be sure the loan package is complete: A complete loan package includes a Loan Application form, a financial statement, and proof of income.

Colons with Quotation Marks

- When using a colon with quotation marks, place the colon **outside** the last quotation mark.

Correct

The style to use for the following document types is "technical writing": user manuals, system documentation and procedure guides.

Incorrect

The style to use for the following document types is "technical writing:" user manuals, system documentation and procedure guides.

Comma

Rules

- Items in a series are normally separated by commas. When a conjunction joins the last two elements in a series, a comma—known as the serial comma, series comma, Oxford comma, or Harvard comma—should appear before the conjunction.
- Use commas to separate parts of a sentence and to clarify thoughts within a sentence.
- When the clauses of a compound sentence are joined by a conjunction, a comma should be placed before the conjunction unless the clauses are short and closely related.
- In a compound sentence composed of a series of short independent clauses the last two of which are joined by a conjunction, the comma should be placed between the clauses and before the conjunction.
- Do not join independent clauses with a comma; use a semicolon or two shorter sentences.

Correct

Harris presented the proposal to the manager, the manager discussed it with the supervisor, then the supervisor made an appointment with the president.

Reports, proposals, and manuals are the responsibility of the Technical Writing Department; the Advertising Department handles brochures, catalogs, and press kits.

Reports, proposals, and manuals are the responsibility of the Technical Writing Department. The Advertising Department handles brochures, catalogs, and press kits.

Incorrect

Reports, proposals, and manuals are the responsibility of the Technical Writing Department, the Advertising Department handles brochures, catalogs, and press kits. **(no semicolon)**

- A comma should be placed before and after the year in a three-part date.

Correct

The Declaration of Independence was signed on July 4, 1776, but the U.S. Constitution was not adopted until September 17, 1787, more than 11 years later.

- Commas are usually used to set off the abbreviation **Inc.** unless the company's preference is to drop the comma. When commas are used, they are placed before and after the abbreviation when it appears in a phrase or sentence.

Correct

ABC Company, Inc., may postpone a foreclosure sale. [The company name includes a comma before Inc.]

Citigroup Global Markets Inc. is an approved vendor. [The company name does not include a comma before Inc.]

Dash

Overview

Four types of dashes exist, although only the first two are likely to be used in Data Trace documentation. The dashes are as follows:

- Em dash
- En dash
- 2-em dash
- 3-em dash

This topic describes rules for using the em dash and en dash.

According to **The Elements of Style**, an em dash is "a mark of separation stronger than a comma, less formal than a colon, and more relaxed than parentheses. Use a dash only when a more common mark of punctuation seems inadequate."

Rules

- Use **em** dashes to set off defining or enumerating complementary elements that are added to or inserted into a sentence.
- When using an **em** dash within a sentence, do not put spaces between the em dash and the text—keep the text next to the dash.

Correct

The information—text, numbers, and formulas—is stored in cells.

Incorrect

The information — text, numbers, and formulas — is stored in cells.

- Do not use **em** dashes in place of bullets or other typographic symbols to set off items in a list.

Incorrect

The report contains the following information: (use bullets instead)

—New housing starts

—Unemployment claims

—Area demographics

- When a sentence follows an **em** dash, do not capitalize the first word unless it is a proper noun.

Correct

Layoffs, foreclosures, and high interest rates—these all contributed to a weak housing market.

Layoffs, foreclosures, and high interest rates—Smith stated that these all contributed to a weak housing market.

- Use **en** dashes to indicate continuing, or inclusive, numbers, such as dates, times, or reference numbers.

Correct

2002–2003

May–June 2003

10:00 a.m.–2:00 p.m.

10:30 a.m.–2:30 p.m.

pp. 55–60

Incorrect (use an en dash instead)

Fiscal years 2003—2004

- Use **en** dashes to indicate negative numbers or minus signs.

Correct

–24 (minus or negative 24)

- Use **en** dashes in place of hyphens in compound adjectives, one element of which consists of two words (such as Windows 2000) or a hyphenated word (such as MS-DOS).

Correct

Windows 2000–based programs

MS-DOS–compatible products

Incorrect

Windows 2000-based programs

MS-DOS-compatible products

Ellipses Point

Overview

Rules

Ellipsis points (or marks) are a series of three dots that indicate the omission of quoted words. Other uses of ellipses are to show a trailing off of thought at the end of a sentence or to show a pause, as is done with a comma or a dash.

- If ellipsis points replace the end of a sentence, follow them with a closing period, with no intervening space.

Correct

The quick brown fox

- If a table is used to display if/then information, use ellipses in column headings.

Correct

If the check...	Then...
Contains a return address	Return the check to the sender.
Does not contain an address	Shred the check.

Note: In RoboHelp, insert ellipses by clicking the **Insert** menu, then clicking **Symbol**.

Exclamation Point

Overview

An exclamation point (!) is a mark of punctuation used at the end of a sentence to show urgency, surprise, enthusiasm, disbelief, or strong emotion.

Rules

- Use exclamation points **only** after true exclamations or commands.

Correct

Attention!

Incorrect

It was a wonderful show!

- Never use more than one exclamation point after a command or exclamation.

Incorrect

Attention!!!

Parentheses

Rules

- Do not use "parenthetical plurals." They are hard to read and, in many cases, present subject-and-verb agreement problems.

Correct

Return the forms and invoices to Accounts Payable using interoffice mail.

Provide full addresses and telephone numbers for all applicants.

Incorrect

Return the form(s) and invoice(s) to Accounts Payable using interoffice mail.

Provide full address(es) and telephone number(s) for all applicants.

- When an expression within a sentence is put into parentheses, it is punctuated as if it stood by itself; no punctuation comes at the end of the expression (as shown here) unless it is a question mark or explanation point (as shown here!).

- (When an entire sentence is parenthesized, as shown here, the period falls inside the final parenthesis mark.)
- Numerals or letters enumerating items in a list within a paragraph should be enclosed in parentheses and should not be followed by a period.

Correct

He went to the manager's office (his third attempt to see her), but she was gone.

He stated (and why should we doubt him?) that the calculations were accurate.

The two folders are (1) Goals and (2) Accomplishments.

Incorrect

He went to the manager's office (his third attempt to see her,) but she was gone.

The two folders are 1) Goals and 2) Accomplishments.

- Use brackets for parentheses within parentheses (see **Brackets**).

Period

Rules

Terminal Punctuation

- Use a period to indicate the end of a declarative or imperative sentence.
- Omit the period at the end of a sentence that is included within another sentence.

Correct

The file (it is located on the network server) contains the necessary information.

- Use a period after numerals or letters used to enumerate items in a vertical list.

Correct

1. Log on to Vision.
2. On the **Loan** menu, click **Search by Account Number**.
3. In **Enter Account Number**, type the loan number, and then click **OK**.
4. In **Note**, type any information about the status and steps completed for the deed-in-lieu.
5. Copy the information in **Note**, and paste it into **Special**.

Periods with Quotation Marks, Parentheses, and Brackets

- Place periods within quotation marks.

Correct

In the text, look for the following quote: "This is a test."

He was unfamiliar with the term "categorical imperative."

- When parentheses or brackets are used to enclose an independent sentence, the period belongs inside.

Correct

He insisted on rewriting the first paragraph. (He made no other changes.)

- If the enclosed matter is part of an including sentence, the periods should be placed outside the parentheses or brackets.

Correct

He insisted on rewriting the first paragraph (but he made no other changes).

Display Lines, Headings, and Legends

- Omit the period after display lines, running heads, centered headlines, column heads in tables, one-line superscriptions, legends, and date lines that head communications.

Correct

Sale Prices Good for This Month Only (headline)

New version, dated 04/10/03

Incorrect

Sale Prices Good for This Month Only.

IDD Standards and Style Guide, version 1.0.

New version, dated 04/10/03.

Question Marks

Overview

The question mark is used to mark a query or to express an editorial doubt.

Rules

- Use a question mark at the end of an interrogative element that is part of a sentence.

Correct

How can the figures be reconciled? was the question on everyone's mind.

Incorrect

How can the figures be reconciled was the question on everyone's mind?

- When the question consists of a single word (such as who, when, how, or why) within a sentence, neither question mark nor capital letter need be used.

Correct

The question was no longer how, but when.

He wondered why.

- A request courteously disguised as a question should not be terminated by a question mark.

Correct

Will you please rush the manuscript to the publisher.

Will the audience please rise.

Incorrect

Will you please rush the manuscript to the publisher?

- Indirect questions should not be followed by a question mark.

Correct

He was thorough enough to ask whether they had seen the report.

He was thorough enough to ask, "Have they seen the report?"

Incorrect

He was thorough enough to ask whether they had seen the report?

He was thorough enough to ask, "Have they seen the report"?

Quotation Marks

Rules

- Formal quotations cited as documentary evidence should be introduced by a colon and enclosed in quotation marks.
- A quotation grammatically in apposition or the direct object of a verb should be preceded by a comma and enclosed in quotation marks.
- If a period or comma comes at the end of a quotation, place the period or comma **inside** the last quotation mark. This rule always applies, regardless of the reason for the quotation.
- Place colons and semicolons **outside** quotation marks.

Correct

The manual states: "Avoid quotes unless absolutely necessary," so avoid them whenever possible.

The reviewer says, "Keep it short and simple."

The following message appears: "Updating file to reflect changes."

The style to use is "technical writing"; it differs from expository writing.

Incorrect

The reviewer says, "Keep it short and simple".

The style to use is known as "technical writing;" it differs from expository writing styles.

System Input

- When instructing a user to type text, omit the quotation marks. Otherwise, users may become confused and believe that they should also type the quotation marks.

Correct

Type **This is a test.**

Incorrect

Type "**This is a test.**"

- Place a dash, question mark or exclamation point inside the quotation marks when it applies only to the quotation; place it outside the quotation marks when it applies to the whole statement.
-

Correct

She said, "Will you be at work tomorrow?"

Didn't she say, "Will you be at work tomorrow"?

Incorrect

She said, "Will you be at work tomorrow"?

- When a mark applies to both quotation and sentence, use it only once.

Correct

Have you ever asked, "May I come in"?

Incorrect

Have you ever asked, "May I come in"?"

Semicolon

Overview

A semicolon is used to mark a more important break in sentence flow than that marked by a comma.

Rules

- Use a semicolon between the two parts of a compound sentence (independent, or coordinate, clauses) when they are not connected by a conjunction.
- Use semicolons sparingly; in user manuals, independent clauses should generally be written as two short sentences rather than one long sentence with a semicolon.
- The following words are considered adverbs rather than conjunctions and should therefore be preceded by a semicolon when used transitionally between clauses of a compound sentence: **then, however, thus, hence, indeed, accordingly, besides** and **therefore**.

Correct

The proposal was modified as requested; it now includes an escalator clause.

The proposal was submitted late; **hence**, there was a delay in granting funds.

The proposal was submitted late; **however**, the funds were granted on time.

Incorrect

The proposal was modified as requested; and it now includes an escalator clause.

The proposal was modified as requested, it now includes an escalator clause.

- If several semicolons are called for, it may be less convoluted and clearer to the reader if the sentence is broken out into an unordered (bullet) list.
- Remember to capitalize the first word after each bullet.

Correct

In this tutorial, readers will learn to

- Quickly construct a user interface
- Easily implement both single-document interface and multiple-document interface applications
- Implement features that until now were considered difficult, such as printing, toolbars, scrolling, and context-sensitive help
- Take advantage of many built-in components of the class library

Incorrect (Convoluted)

In this tutorial, readers will learn to quickly construct a user interface; easily implement both single-document interface and multiple-document interface applications; implement features that until now were considered difficult, such as printing, toolbars, scrolling, and context-sensitive help; and take advantage of many built-in components of the class library.

- When using a semicolon with quotes, place the semicolon **outside** the quotation marks.

Correct

The style we use is "technical writing"; it differs from expository writing.

Incorrect

The style we use is "technical writing;" it differs from expository writing.

Slash

Rules

- Do not use "slashed constructions"; they damage writing clarity and readability. (Exceptions: **read/write**, **input/output**, and **and/or**)

Correct

plat map or location map

Shipping Department associates or credit analysts

Incorrect

Deed/Mortgage/Instrument

plat map/location map

Shipping Department associates/credit analysts

- Use a slash (/), rather than hyphens, in the MM/YY, MM/DD/YY, MM/DD/YYYY, and similar date formats.

Correct

04/01/07

05/02/2007

Incorrect

04-01-07

05-02-2007

- Use a slash to indicate periods or seasons extending over parts of two successive calendar years.

Correct

fiscal year 2006/07

Review and Approval Process

Peer Reviews and Edits

Rule

Although peer reviews are not specifically included in the Review Process Table (see Review and Approval Process), information designers are encouraged to seek the advice and review of other writers when drafting material, especially if the subject matter is long and complex. Peer reviews and edits can also help technical writers strengthen their writing and editing skills.

RoboHelp Project Styles

Adding Words to the RoboHelp Dictionary

RoboHelp and other software products often use inadequate dictionaries. These dictionaries do not recognize many proper names and incorrectly "flag" many words as misspellings (with red wavy underlining) when they are spelled correctly. To eliminate such incorrect flags, add words to the RoboHelp dictionary by following this procedure.

Procedure

To add a word to the RoboHelp dictionary:

1. Select the word you want to add.
2. Right-click, and then point to **Spelling**.
3. Click **Add To Dictionary**.

Note: Words can also be added to the RoboHelp dictionary during the spell-check process.

Creating Glossary Terms

This topic describes how to create a glossary term topic, how to create the link between topic text and the term, and how to apply the "Glossary text" style to the link text.

Procedure

To create a glossary term topic:

1. In the RoboHelp project, click the **Create a New Topic** icon.
2. In the **New Topic** window, in **Topic Title**, type the name of the term you intend to define.
3. In **File Name**, type the file name, including the information type of **GL_**.
4. In **Template**, click **GlossaryTerm**.
5. Click **OK**. A new topic opens; the name of the term appears in the GlossTerm heading style.

To create a hyperlink between topic text and a glossary term topic:

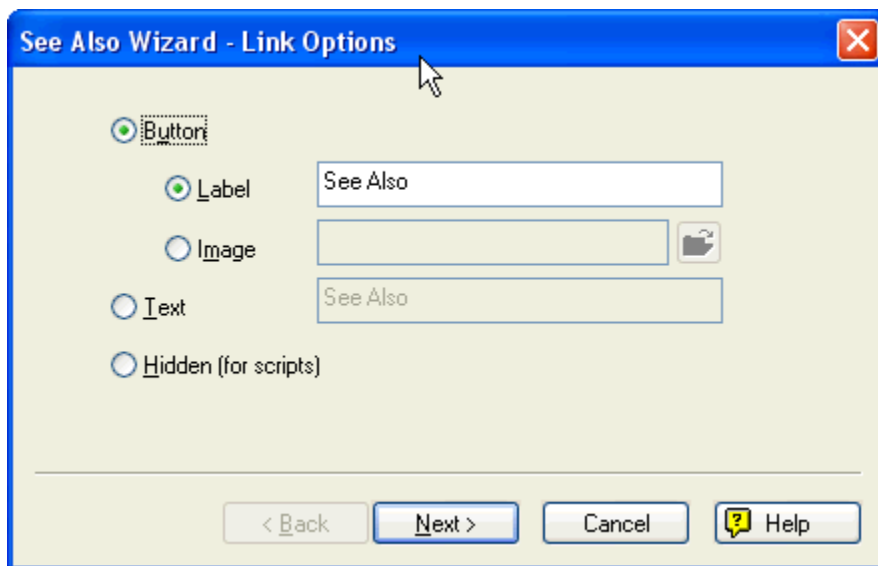
1. Highlight the word or phrase that you want to serve as the link to the glossary term.
2. Click the **Insert Hyperlink** icon.
3. Under **Hyperlink Options**, click **Display in auto-sizing popup**.
4. In **Select destination (file or URL)**, locate the glossary term topic to which you want to link.
5. Click **OK**.
6. While the link text is still highlighted, in the RoboHelp **Style** box, click **Glossary text**.
7. Test the link to ensure that the glossary term appears in an auto-sizing window. (Click the **View Selected Item** icon (eyeglasses), and then click the green link text.)

Creating See Also Buttons

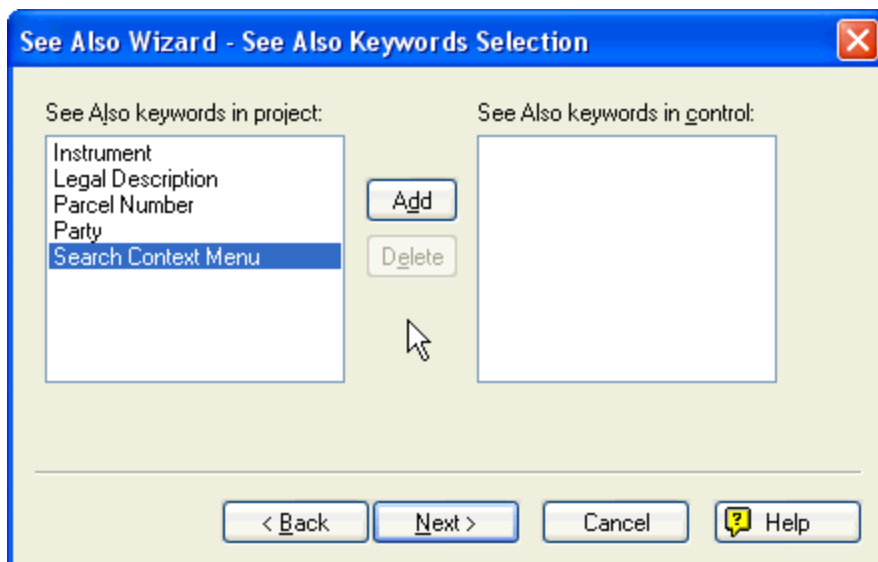
Procedure

To create a See Also button:

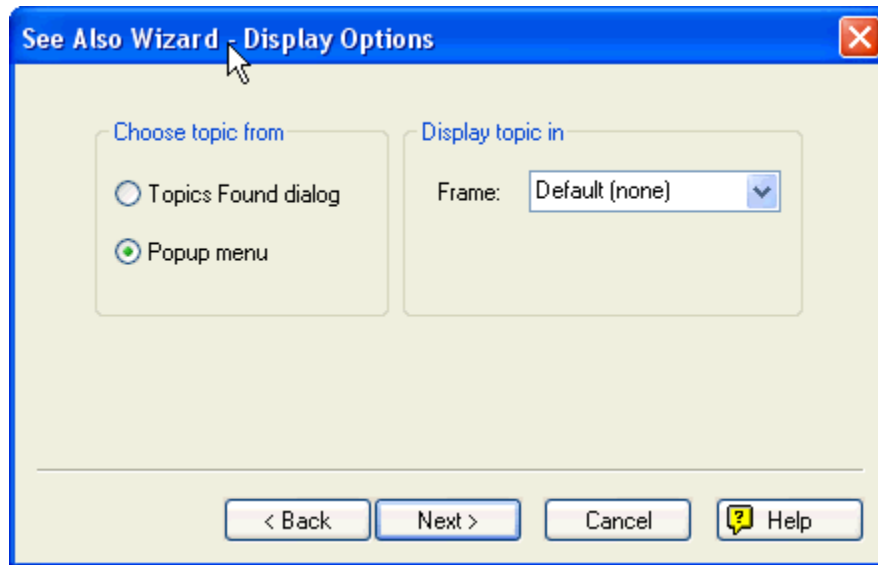
1. Open the topic in which you want to add a **See Also** button.
2. On the **Insert** menu, click **See Also**. The **See Also Wizard** opens.
3. Complete the **See Also Wizard—Link Options** window.



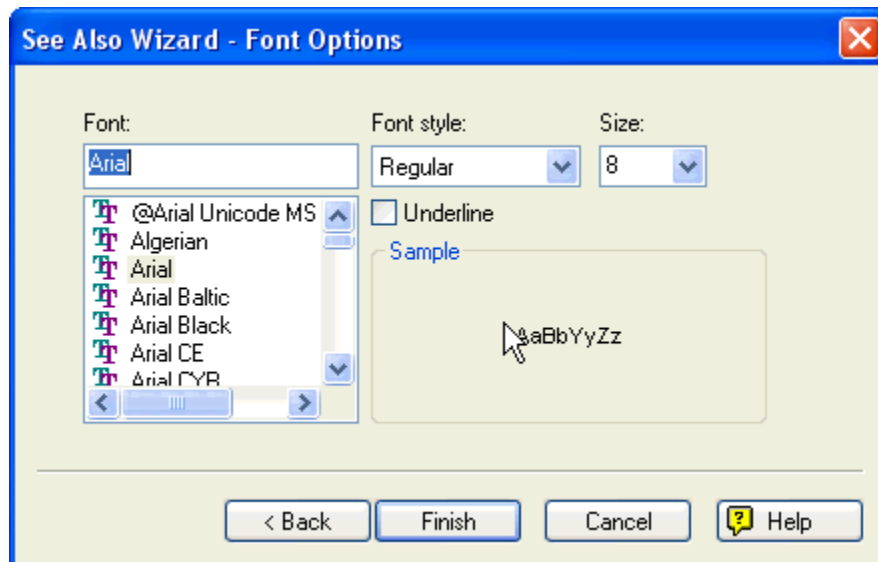
4. Complete the **See Also Wizard—See Also Keywords Selection** window.



5. Complete the **See Also Wizard—Display Options** window.



6. Complete the **See Also Wizard—Font Options** window.



7. Copy and paste the **See Also** button into each topic that should receive it. For example, paste the **See Also** button into all of the procedure topics.
8. Apply the **See Also** style to the button.

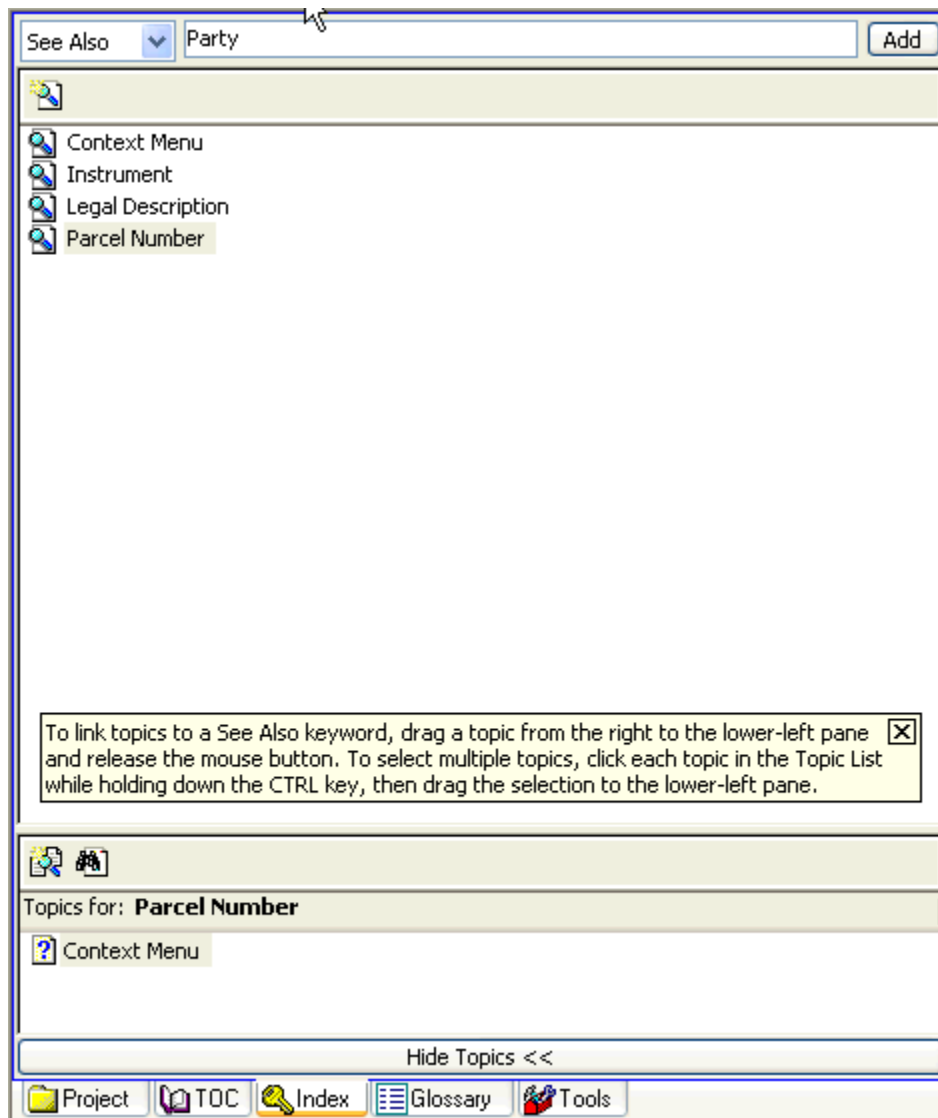
Note: You must compile WebHelp to test the **See Also** button.

Creating See Also Keywords

Procedure

To create a **See Also** keyword:

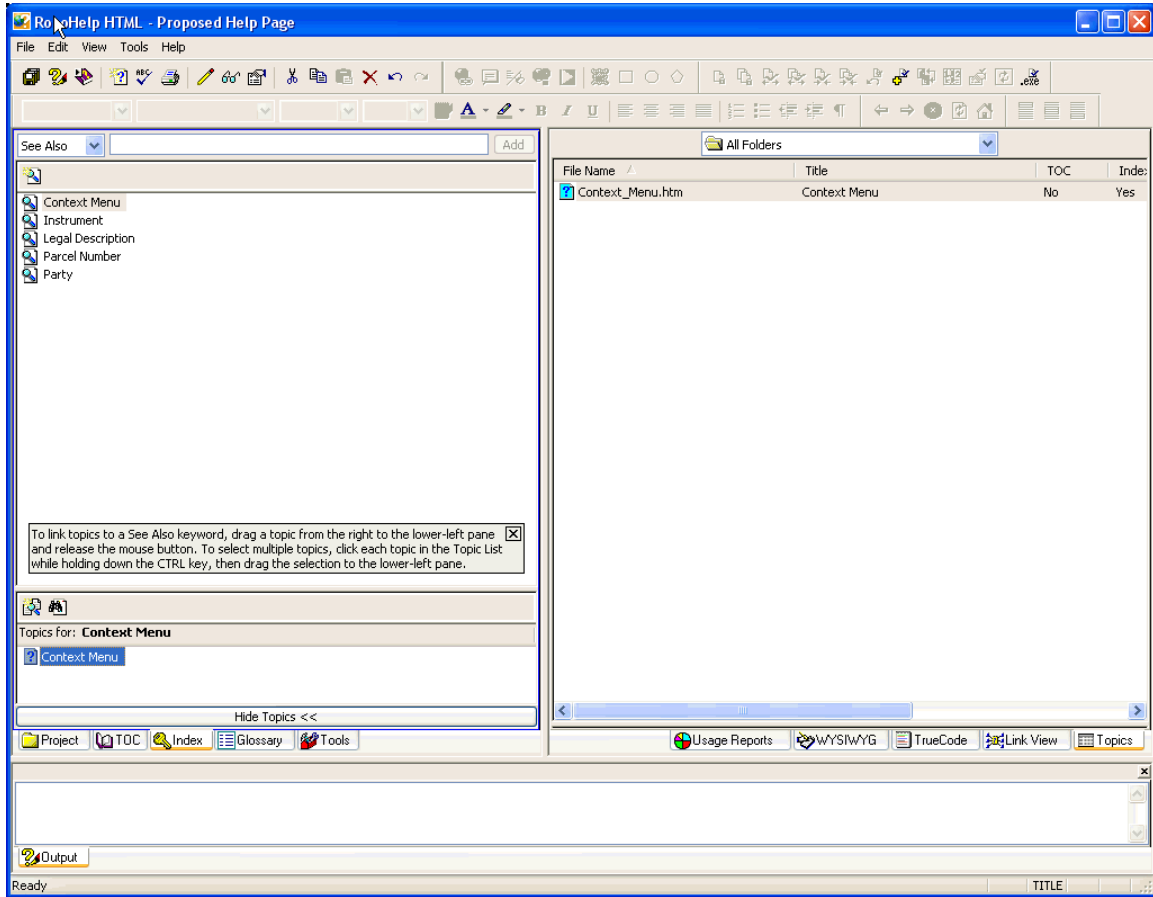
1. Click the **Index** tab.
2. In the top-left corner of the **Index** tab, click **See Also** from the list.
3. In the box next to the list, type the name of the **See Also** keyword, and then click **Add**. The **See Also** keyword appears in the top section of the **Index** tab.



Note: The See Also keyword appears in bold until you add a topic to it.

4. Click the **Topics** tab. Topic names appear in the right pane.

5. Drag and drop the topics that you want to link to the keyword into the **Topics for** pane. The See Also keyword is created and you can now create the **Creating See Also Buttons** button.



Note: Include the relevant About, Business Policy, and Process Flow topics. Also include related procedural topics, including shared topics. Not every topic in the book may be related.

Overview

This topic describes the RoboHelp styles used in Information Design templates.

Style Descriptions (**are these still the same?**)

Style	Description
Heading 1	Use for the topic title.
<u>Heading 2</u>	Use to designate the following sections: <ul style="list-style-type: none"> • Overview • Rules • Guidelines • Procedure
Heading 3	Use for the infinitive phrase and subtopics within a Heading 2 section.
Normal	Use this style for text.
DocTitle1	Use for the company or division name in the header.
DocTitle2	Use for the department name in the header.
Note	Note: Use for information that appears in the middle of a procedure.
GlossTerm	
Heading Table	Use for table headings.
Seealso	Used to format the paragraph that contains the See Also button.
SummaryHeadingTable	Use for Book Summary table headings.
Bold	Obsolete style. May have been used in some projects to apply bold formatting to text. Instead of using this style when text should appear in boldfaced font, use the Apply Bold button on the Formatting toolbar.
Glossary text	Apply this style to the link text leading to a glossary term.
Image link	Use to link an image to a button, tab, field, or window name (see Using the ImageLink Style).
YellowHighlight	Use to indicate new or revised text. Apply the "Default paragraph font" style to remove the YellowHighlight style.

Starting Projects with the Model Project

Procedure

To start a RoboHelp project:

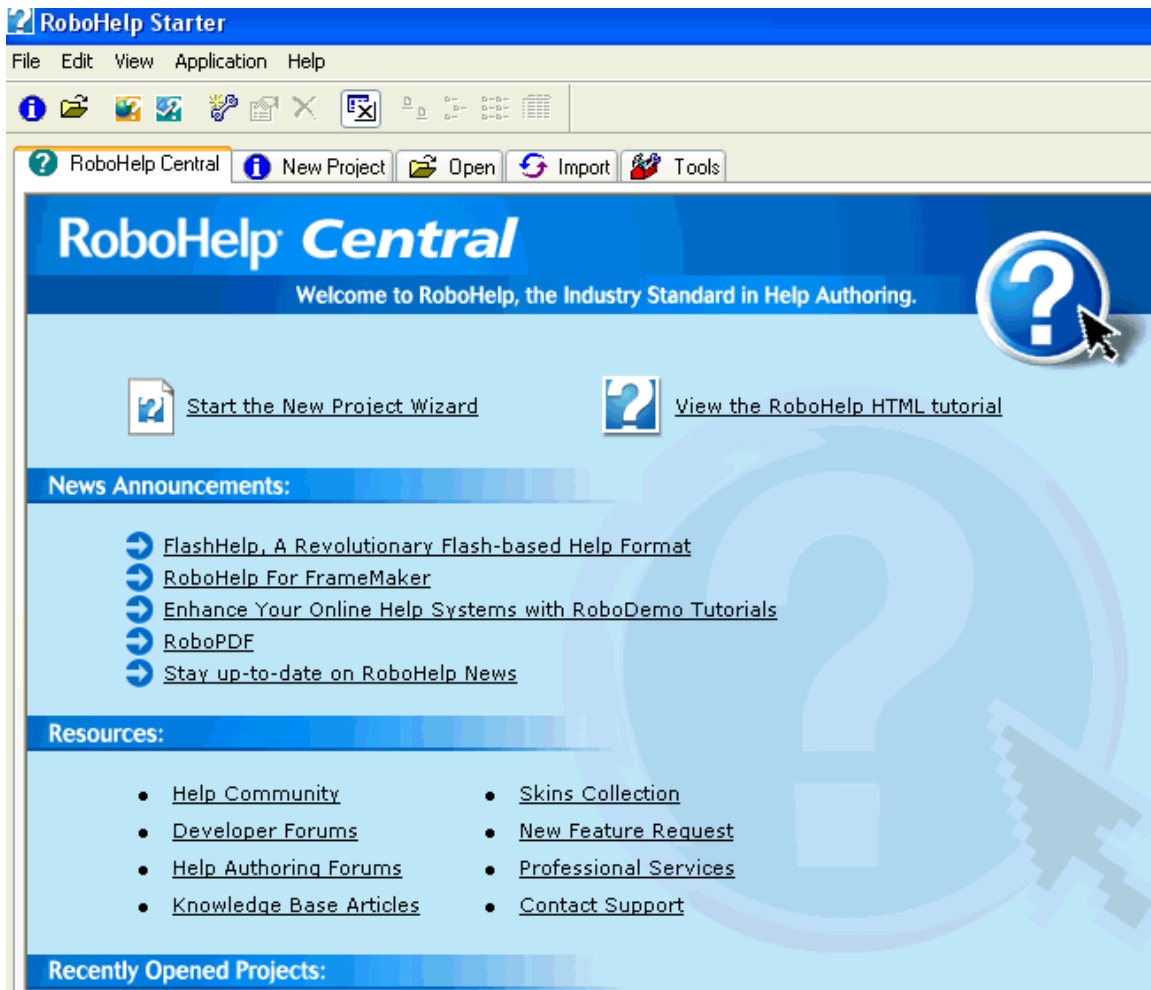
1. Start RoboHelp. The **RoboHelp HTML** window opens automatically.
2. Click **Create a new project**. The **New Project** window opens.
3. In **Help Project Type**, ensure that **WebHelp** is selected, and then click **OK**. The **New Project Wizard** opens.
4. Type the appropriate information into the following fields:
 - Project title
 - Project file name
 - Location of the project
 - Title of first topic
5. Select the **Enable WebSearch** check box if it is not selected.
6. Click **Finish**. The main **RoboHelp** window opens.

Creating a New RoboHelp Project

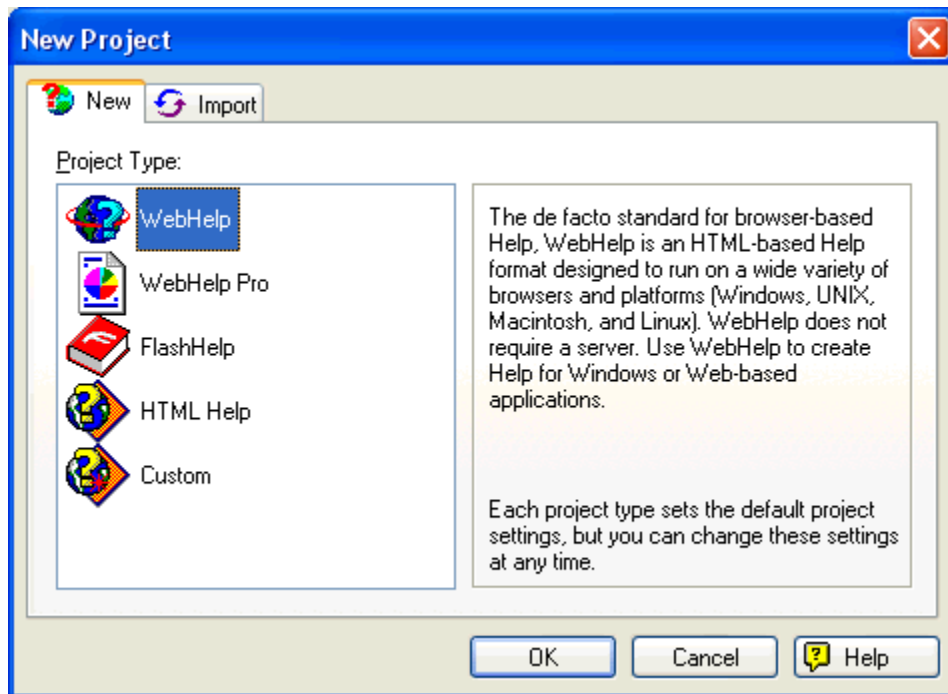
Procedure

To Start a RoboHelp project:

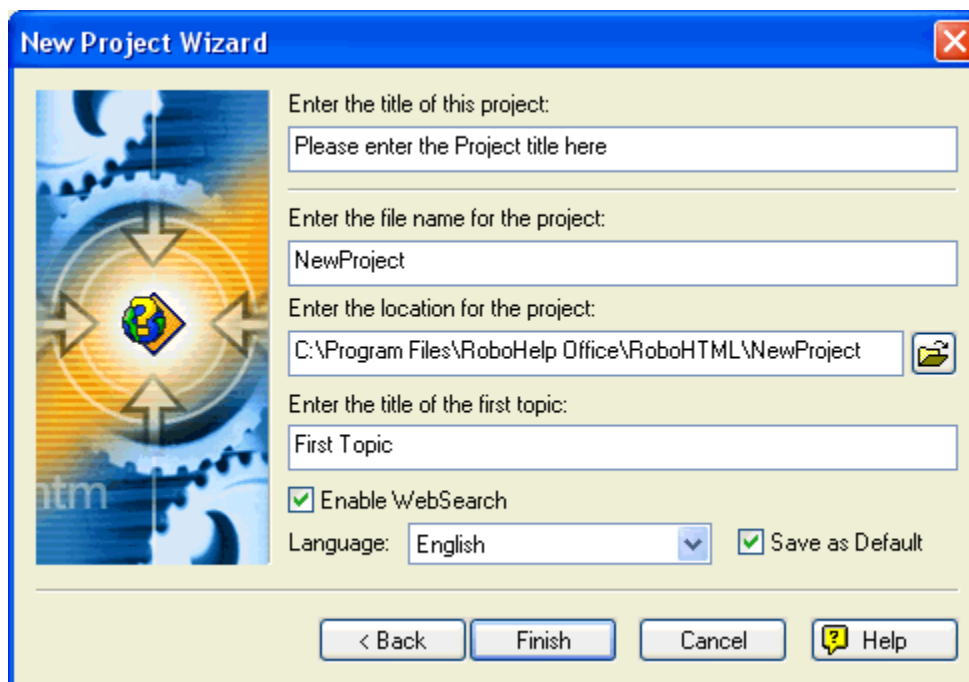
1. Start RoboHelp. The **RoboHelp HTML** opens automatically.



2. On the **File** menu, click **New > WebHelp**. The **New Project Wizard** opens.



3. In **Project Type** select **WebHelp**, and click **OK**. The **New Project Wizard** opens.



4. Type the appropriate information into the following fields:

- Project title
- Project file name
- Location of the project
- Title of the first topic

5. Select the **Enable WebSearch** checkbox if it is not selected.

6. Click **Finish**. The main RoboHelp window opens.

Symbols

Ampersands

Rules

- It is acceptable to use an ampersand (&) if it is part of a company's official name or part of a trade name.
- Do **not** use an ampersand in place of the word **and** in most other contexts.

Correct

Town & Country Credit Corporation

Press the **&** key.

Incorrect

Open the file & follow the directions.

Copyright

Overview

A copyright is the exclusive right to prohibit unauthorized publication, production, or sale of a literary, dramatic, musical, or other artistic work.

Copyright notices are established to protect published work from infringement by persons or entities other than the original author and publisher.

Under U.S. copyright law, a valid copyright notice generally consists of three elements:

- © symbol, the word **Copyright**, or the abbreviation **Copr.**
- Year of first publication of the work

- Name of the copyright owner, a recognizable abbreviation, or generally known alternative designation

Rules

- When placing a copyright in text, use the © key. Do not spell out the word.
- It is the publisher's responsibility to place copyright notices on published work. Do not place a copyright symbol in proximity to published work by another author.

Using Copyrighted Material

- Under the doctrine of **fair use**—the licit employment of copyrighted material—others may copy **brief portions** of a copyrighted work for certain purposes without obtaining written permission from the publisher. When using copyrighted material, accurately transcribe the text and give credit to the sources.
- Reference the exact source of the material in a note or internal reference in the text, in a source note to a table or in a credit line with an illustration.
- The term **brief** refers to the amount of material **in relation to the entire document**—to quote 500 words from an essay of 5,000 is considered more serious than the same number of words from a work of 50,000.
- When the amount or nature of the quoted material is considered to be more substantial, obtain permission from the publisher before printing the material.

Guidelines

Although the law does not define the exact limits of **fair use**, factors to consider include the following:

- The purpose of the use: nonprofit or educational purposes are judged by more lenient standards than commercial use
- The nature of the copyrighted work: highly technical or fact-based material is judged by stricter standards than fiction
- The amount and substantiality of the portion used in relation to the copyrighted work as a whole
- The effect of the use upon the potential market for, or value of, the copyrighted work.

Percentages

Overview

Percent means per hundred; **percentage** means a proportion or share in relation to a whole. See the **Percentages and Fractions** topic for information on using numerals with percentages.

Rules

- Whenever possible, use the % key instead of typing the word **percent**.
- Do not use the % key in place of the word **percentage**.

Correct

Sales for the quarter rose by 43%.

The **percentage** of bad loans compared to total equity is low.

Use the chart to compare **percentages** of income levels to population density.

System Input

- When instructing a user to type a symbol key, use the name of the key, stated in title case. For symbol keys that are not named (such as the % key), use the symbol.

Correct

At the screen prompt, type **41%** (use the % key).

Incorrect

At the screen prompt, type **41%** (use the **Percent** key).

Symbols in Text

Rules

- When referencing symbols, use the actual symbol rather than typing the name of the symbol.
- When instructing a user to type a symbol key, state the name of the key in title case.
- For symbol keys that are not named (such as the % key), use the symbol.

Correct

Press the **&** key.

Press the % key.

Incorrect

Press the **Ampersand** key.

Press the **Percent** key.

Trademarks and Service Marks

Overview

A trademark is a symbol, design, logo, word, letter, motto, slogan, or the like used by a business to distinguish itself or its products from its competitors. Trademarks are used to identify products by trade name and to distinguish them from those of competitors.

A registered trademark consists of at least one of the following:

- The symbol ®, the words **trademark**, **registered trademark**, or the abbreviation **reg.**
- The proprietary name, capitalized and enclosed within parentheses. (Arm & Hammer)

A **service mark** symbol is a design, word, letter, or slogan used by a supplier of a service to distinguish the service from that of a competitor. Service marks are usually registered and protected by law; they often accompany the word **Trademark**.

Rules

- Whenever possible, use service mark symbols provided by the supplier; do not attempt to duplicate service mark symbols by drawing them.
- Never represent a protected service as one's own; instead, credit the original service provider.
- Whenever possible, use the ® symbol. Do not spell out the word.
- When referring to **registered trademark** as an explanatory or descriptive term, use lowercase.
- Use title case when the term appears in a title or heading.
- Do not confuse trade names with generic products or processes.
- Be aware that the term **Realtor** is a trademark. It denotes a member of the National Association of Realtors. Use "real estate agent" when referring to persons who represent buyers and sellers in a real estate transaction.

Correct

IBM, PC-DOS, OS/2, are **registered trademarks** of the IBM corporation.

Used in a Heading: RoboHelp is a **Registered Trademark** of Adobe Systems, Inc.

Please **photocopy** this document.

Incorrect

IBM, PC-DOS, OS/2, are **Registered Trademarks** of the IBM corporation.

Please **Xerox** this document.

Tables

About Tables

Overview

A table is an arrangement of data with two or more rows and two or more columns. Usually, the information in the first column describes something whose attributes are shown in the other columns.

A table usually has column headings, and it can optionally have a title.

Note: A list of similar entries that is arranged in multiple columns is not a table but a **Multicolumn Lists**, for example, a list of commands.

Rules

- Introduce tables with a sentence ending with a period.
- If a table is titled, an introductory sentence does not need to precede the table.
- Tables for on-screen display should follow the same guidelines as tables in other content. Keep in mind these additional points, however:
 - Table dimensions must be visible on a minimum screen resolution, usually 800 × 600 pixels.
 - Tables can be used to simulate frames. In this case, tables are better because older browsers cannot always process frames correctly.

Capitalization and Punctuation in Tables

Rules

- If the table is titled, use title caps for the title. That is, do not capitalize articles, prepositions of four or fewer letters, or coordinating conjunctions.
- Title cap each column heading.
- Initial cap the first word of each column entry and proper nouns.
- It is acceptable to use lowercase for the first word in column entries if capitalization might cause confusion; for example, keywords that must be lowercase.
- End each entry with a period if all entries are complete sentences or are a mixture of fragments and sentences. An exception is when all entries are short imperative sentences (only a few words); such entries do not need a period.
- If **all** entries are fragments, do not end them with periods.

Column Headings in Tables

Rules

- Make column headings as concise as possible, but include information common to all column entries in the heading, rather than repeat it in each entry.
- Use a table to display if/then information. Use ellipses in column headings.

Note: In RoboHelp, insert ellipses by clicking the **Insert** menu, then clicking **Symbol**.

Correct

To	Do This
Open a Web page	In the Address bar, type the address, and then press Enter .
Add a Web page to the favorites list	Click Favorites , and then click Add to Favorites .

To Save a Document	Do This
To a folder	Click Save .
Under a new name	Click Save As .
To a network location	Connect to the server location and folder, and then click Save .

If the Check...	Then...
Contains a return address	Return the check to the sender.
Does not contain an address	Shred the check.

To	Do This
Close a window	Click the Minimize button.
Size a window	Press Ctrl+F8 .

Content in Tables

Rules

- Tables read across from left to right. That is, content in the left column should relate logically and horizontally to the information in adjacent columns. Column headings should reflect this logical flow.
- Place information that is **known** or **obvious** to the user in the **leftmost** column of the table. Place information that the user is **to learn** or an action the user is **to perform** in subsequent columns.
- Make entries in a table parallel, as in lists; for example, in a description or action column, be consistent by starting the entries with a verb or noun.
- When field names appear in a Field/Action table, do not format the field name in bold. However, when the steps refer to field names, buttons, and so on, use bold.

Correct

Device Name	Description
COM1	Serial port 1 ; the first serial port in the computer.
CON	System console ; consists of both the keyboard and the screen.
LPT1	Parallel port 1 ; represents a parallel port.

Field	Action
Transfer ID	Accept the default value.
Transfer Type	Select External Transfer .

- Do not leave a blank column entry. That is, if the information does not apply, type **N/A** or **None**. Do not use em dashes.

Correct

To	In Windows	On the Macintosh
Copy a picture	Right-click + Copy	Command+Shift+T

- Do not use footnotes in tables; place the information in an **Information**-style bullet after the table.

Table Formatting

Overview

Most table formatting is provided by the Standard HTML table format (see Using the Standard Table Format). The guidelines in this topic suggest ways to make tables more readable.

Rules

- Avoid dividing a table between pages. If a titled table is continued on another page, repeat its column headings.
- If a table is very long, consider breaking the material into logically related subtables.
- Use rules between rows if the column information varies.
- Do not use boldfaced text for field names used in tables.
- Apply the HeadingTable style to the table header row.
- Try to limit tables with long entries to two or three columns. Four or more columns can be hard to format and read unless they contain brief, numeric entries. The **second column** in the following example is approaching maximum readable length.

Correct

Addressing Declared with Microsoft Keywords

Keyword	Data	Code	Arithmetic
<code>__near</code>	Data resides in the default data segment; addresses are 16 bits.	Functions reside in the current code segment; addresses are 16 bits.	16 bits
<code>__far</code>	Data can be anywhere in memory, not necessarily in the default data segment; addresses are 32 bits.	Functions can be called from anywhere in memory; addresses are 32 bits.	16 bits
<code>__huge</code>	Data can be anywhere in memory, not necessarily in the default data segment. Individual data items (arrays) can exceed 64K in size; addresses are 32 bits.	Not applicable; code cannot be declared <code>__huge</code> .	32 bits (data only)

Table Numbering

Rules

- **Do not number tables in online documentation;** tables are generally in the same area as the related content, and therefore do not need to be numbered.
- Number tables in **printed documents** if they are not adjacent to the text reference or if a list of tables appears in the front matter.
- If it is necessary to number tables in printed documents, use numbers consistently throughout the document. The numbers should include the chapter number and a sequential table number, such as **Table 2.1**, **Table 2.2**, and **Table 2.3**.

Acronyms

The following table displays Data Trace acronyms.

Term	Definition
AP	All posting
AML's	Adjustable Mortgage Loans
A & R	Assignment and Release
ALTA	American Land Title Association
AMD	Amendment
APN	Assessor's Parcel Number (for property tax). The APN is the number by which property taxes are referenced. When you search for a title by APN, the system does a cross-reference title search by APN. The cross reference is invisible to the user as the title search results are then displayed. Usually a title search is done by legal (land) description such as by parcel, block, lot, subdivision, section, arb, or map book or page number, etc.
APS	Assessor Parcel Number
ARB	Arbitrary. Large tracts portions of which have been sold without the recordation of a subdivision map, carried as a lot in the company account.
AS	Assignment
ASD	Assessed
ASM	Assumption
ASN	Assignment
BND	Bond
BUQA	Business Unit Quality Assurance
CC&R	Covenants, Conditions and Restrictions
CCB	Change Control Board
CS	County Specific
CSR	Customer Service Rep

DIS	Disclaimer
DOT	Deed of Trust
DTS	Data Trace System (First American Real Estate Solutions)
FIC	CCB in India
ICP	Ideas Changes Problems. Used to track needed new features, fixes or improvements needed.
IMP	Improvements
IST	India Standard Time
LP/LLC	Inquiry on Limited Partnership and Limited Liability Corporations.
MLN	Mechanic's Lien
MOD	Modification
MTG	Mortgage
NL	No Listing
OFM	Order File Management
OO	Office Information
P	Plant
PIQ	Property in Question
PITI	Principal, Interest, Taxes, and Insurance payments
PRL	Partial Release
R & R	Releases and Reconveyances
RAT	Ratification
RC	Reconveyance
REL	Release
RL	Release
SAP	Suppress Adjacent Property (Starters). Will not see adjoining lots for base
SAT	Suppress All Tract Searches
SDX	Soundex
SITUS	Physical location
SOS	Secretary of State in California. The California SOS maintains records regarding status, officers, and legal entities involved with a corporation, limited partnership, or a notary.
SR	Starter Record
STS	Smart Title Solutions
SUB	Subordination
SX	Starter Exchange Program
T	Tax
TD	Trust Deed
TEE	Grantee
TIPS	Title Integrated Property Services
TOF	Title Officer
TOR	Grantor
TRT	Tax Rate Table
TT	Title Officer, or TeleTitle System (Group 2)
UCC	Uniform Commercial Code

Glossary**access**

Avoid using as a verb; try to find a substitute, such as open.

affect, effect

Affect is usually a verb meaning to influence. Effect is usually a noun meaning a result.

Correct

Late software can adversely **affect** schedules.
One adverse **effect** of late software is schedule slippage.

Incorrect

He was hoping the **affect** would be minimal.

Hint

Affect means to cAuse, so it has an a.
Effect means the rEsult, so it has an e.

allonge

Written documentation of an endorsement of a Promissory Note or a Lost Note Affidavit. It is attached to the document being endorsed and is generally used when no room is available for the endorsement on the underlying document or it would be more efficient than placing the endorsement directly on the related document.

among, between

Use **between** for only two items; use **among** when referring to more than two.a

Correct

The difference **between** the two versions is significant.
Divide the tasks equally **among** the four team members.

Incorrect

The main difference **among** the two versions is that the newer one is faster.
The tasks should be divided equally **between** the four team members.

and/or

According to **The Little, Brown Handbook**, **and/or** indicates three options: one or the other or both. If you mean all three options, **and/or** is appropriate. Otherwise, use **and** if you mean both; use **or** if you mean either.

Correct

Obtain a telephone number and/or an email address. (Obtain a telephone number or

an email address or both.)

Obtain a telephone number and an email address. (Obtain both.)

Obtain a telephone number or an email address. (Obtain either one.)

appear, display

- **Appear** is an intransitive verb. (It does not require a direct object.)
- **Display** is a transitive verb. (It requires an object.)
- If necessary in context, the passive **is displayed** is acceptable.
- Prefer **opens** to **appears** when referring to windows and screens.

Correct

If the user attempts to quit the program without saving the file, a message **appears**.

The screen **displays** a message if the user does not log on accurately.

A message **is displayed** if the user does not log on accurately.

On the **Tools** menu, click **Options**. The **Options** window **opens**.

Incorrect

If the user attempts to quit the program without saving the file, a message **displays**.

appraise, apprise

To **appraise** means "to set a value on something," but it is often confused with **to apprise (of)**, "to notify or inform."

approval levels

In Loan Origination/Loan Operations documentation, do not capitalize or hyphenate approval authority levels.

Correct

A level 4 approval is required to remove the stipulation.

Incorrect

A Level-4 approval is required to remove the stipulation.

articles

The words **a**, **an**, and **the**.

as, because, since

- Avoid using **as** and **since** to mean **because**.
- Use **because** to refer to a reason.
- Use **since** to refer to a passage of time.

Correct

The system is more stable **because** we installed a new server.

Since the new server was installed, user access has increased by 20% in just two weeks.

Incorrect

He couldn't hear the ambulance siren **as** he was listening to the car radio.

The system is more stable **since** we installed the new server.
We cannot do this **since** it's against the rules.

as, like

- **Like** is acceptable as a synonym for **such as** or **similar to**.
- Do not use **like** as a conjunction; use **as** instead.

Correct

In a workgroup, the user can work with files residing on another computer **as** he would on his own.

Moving a toolbar is **like** moving a window.

Incorrect

In a workgroup, the user can work with files residing on another computer **like** he would on his own.

Always use the technical writing style, **like** you would in a user manual.

assure, ensure, insure

- To **assure** is to confidently inform.
- To **ensure** is to make sure of something.
- To **insure** is to take out an insurance policy

auto-populate

Avoid using the term auto-populate to describe system behavior. Instead, use another phrase, such as automatically populate.

Correct

Some of the topics in the **Topic** list contain templates that automatically populate the **Message** field.

Incorrect

Some of the topics in the **Topic** list contain templates that auto-populate the **Message** field.

back up, backup

- To **back up** [two words] means to take action; use it only as a verb.
- Use **backup** [one word] only as a noun or an adjective; do not use it as a verb.

Correct

Back up the files before turning off the computer. (verb)

Save the **backup** to the network directory. (noun)

Create **backup files** for off-site storage. (adjective)

Incorrect

Backup the files before turning off the computer.
Save the **back up** to the network directory.

books

In RoboHelp, a book is a group of related topics under a book icon. A book can comprise a book summary topic, an "about" topic, a business policy topic, a process flow topic, one or more procedure topics, and sometimes, document pages.

calendar

Do not use as a verb; instead, use **schedule**, **list**, or another appropriate verb.

Correct

Mark the **calendar** for the upcoming event.
Schedule the event for next Tuesday.

Incorrect

Let's **calendar** the event for next Tuesday.

can, may, might

- Use the verb **can** to describe actions or tasks that a user or program is capable of doing.
- Use **may** or **might** to express a possible outcome, or when the result of an action is unknown or variable
- Use **may** in the sense of having permission to do something.
- In general, avoid **could**; it's seldom necessary.

Correct

He **can** use a spreadsheet to perform the calculations.
Because of her security clearance, she **may** access the primary server.
He **might** use a buy-down option to lower his initial monthly payments
If the project is ahead of schedule, they **might** be allowed to leave early.

Incorrect

He **may** use a spreadsheet to perform the calculations.
If the project is ahead of schedule, they **could** be allowed to leave early.

cancel, cancelled, canceling, cancellation

This topic describes the spelling of cancel, canceled, canceling, and cancellation as used in the United States. British usage is different.

- Spell the verbs **cancel** and **canceled** and the gerund **canceling** with only one **I**.
- Spell the noun **cancellation** with two **I**'s.

Correct

Please **cancel** that request.
The meeting was **canceled**.

She's thinking about **canceling** the appointment.
The **cancellation** of the meeting was unexpected.

cardinal numbers

Numbers that express amount, such as one, two, and three.

cascading menu

According to the **Microsoft Manual of Style for Technical Publications**, a cascading menu (or submenu) is the secondary menu that appears when the user selects a command that includes a small arrow on the right.

cc:

- the term **cc:** is used to identify a copy of an email message.
- The term **cc:** may be used as a verb.
- Type **cc:** with two lowercase letters followed by a colon.
- Instead of beginning a sentence with **cc:**, use another word.
- The acronym **cc:** does **not** need to be spelled out.
- Correct
- Email the request to the vendor and **cc:** the team lead.
- Send a copy to the account representative.
- Incorrect
- Email the request to the vendor and **CC** (carbon copy) the team lead.
- **cc:** the account representative.

clause

A sequence of related words within a sentence. A clause has both a subject and a predicate and functions either as an independent unit (main clause) or as a dependent unit (subordinate clause, used as an adverb, an adjective, or a noun).

common nouns

Nouns that name general classes of people, places, and things.

Examples: a nun, a city, a freeway

compound adjectives

A combination of words (of whatever parts of speech) that function as a single adjectival unit (**drop-down** menu, **pop-up** window, **owner-occupied** property, third-party authorization). Most, but not all, compound adjectives use hyphens to separate their individual elements.

comprise, compose

Comprise, according to the **Elements of Style**, means "embrace": A zoo comprises mammals, reptiles, and birds (because it "embraces," or "includes," them). But animals do not comprise ("embrace") a zoo—they constitute a zoo.

Another way to think about comprise is that it is the whole, and what it includes are the parts.

Do not use **comprise** with the preposition **of**; use **composed** instead, as in **composed of**.

Correct

The **Legal Group comprises** six departments.

The **Legal Group is composed of** six departments.

Incorrect

The **Legal Group is comprised of** six departments.

coordinating conjunctions

Conjunctions connect other words or groups of words to one another. Coordinating conjunctions join equivalent structures—two or more nouns, pronouns, verbs, adjectives, adverbs, prepositions, conjunctions, phrases, or clauses. (The conjunctions **nor**, **for**, and **so** can connect independent clauses only.)

Examples

and, but, or, nor, for, so, yet

data

Data is now commonly accepted in business and technical writing with a singular verb. ("The data **is** available.") Use singular verbs with **data** in IDD information products.

In academic writing, it is still necessary (and correct) to use a plural verb for this plural Latin term.

different

When following a number, **different** is often superfluous; delete it in these cases.

Correct

The loan coordinator processed 30 loans today.

Incorrect

The loan coordinator processed 30 **different** loans today.

done, finished

Do not use **when you are done**; use **when finished** instead.

Correct

When **finished** with the editing, print the file.

Incorrect

When **done**, print the file.

email

- Use **email** to refer to an electronic mail program, as in **send the file using email**, but use **email messages**, or just **messages** or **notes**, to refer to pieces of email.
- It may be used as a verb, as in **email the file**.
- Do not capitalize the **e** in email. Use **Email** only at the beginning of a sentence and in headings.

em dash

A mark of punctuation used to mark a break in thought, to set off a parenthetical element for emphasis or clarity, and to set off an introductory series. A dash is equal to the width of an uppercase M in the font style being used. Use dashes sparingly and not as easy or automatic substitutes for commas, semicolons, or end marks.

Note: In RoboHelp, insert an em dash or en dash by clicking the **Insert** menu, then clicking **Symbol**.

en dash

A mark of punctuation used with sets of numerals, letters, or a combination of both; exceptions include numbered designations of aircraft (DC-10) and highways (I-15), which use hyphens. An en dash is half the width of an em dash and longer than a hyphen.

Note: In RoboHelp, insert an en dash or em dash by clicking the **Insert** menu, then clicking **Symbol**.

enter, type

- Use **type** to describe what users type in a screen, window, or page.
- An exception to this rule applies when documenting a combo box. It is acceptable to tell users to **enter** a choice when they can **either** type a value or select one from a list.
- Use a combination of words such as **type** or **select** if space is not an issue.

Correct

Type the password.

Enter the file name. (only when describing a combo box)

Type the path to the server or **select** it from the list. (only when describing a combo box)

Incorrect

Enter the password.

entitled, titled

- Do not use **entitled** as a synonym for **titled**.
- **Entitled** implies that someone is owed something.
- To specify the name of a book, program or similar item, use the word **titled** instead of **entitled**.
- The word **titled** is not followed by a comma.

Correct

Look in the manual **titled** *User's Guide*.
The user is **entitled** to a set of documentation.

Incorrect

Look in the manual, **entitled** *User's Guide*.
Look in the manual **titled**, *User's Guide*.

etc.

Do not use. Instead, write **and so forth** or **and so on**.

fax, facsimile

- Do not use **facsimile** to refer to the kind of document sent through a fax machine; use **fax** instead.
- Use **facsimile** only to refer to an exact reproduction of something else.
- Use **fax** as a noun, adjective, or verb.
- Do not use **FAX** in all caps.

Correct

The **fax** arrived. (noun)
The **fax** machine was broken, so the **fax** transmission did not arrive. (adjectives)
Please **fax** a copy of the order to the client. (verb)
He **faxed** the order yesterday. (verb)

Incorrect

Please **FAX** me a copy of the order.
He **FAXed** the order yesterday.

fewer, less, under

- Use **less** to refer to a mass amount, value, or degree.
- Use **fewer** to refer to a countable number of items. (But see the exception.)
- Do not use **under** to refer to a quantity or number.

Correct

The new building has **less** floor space and contains **fewer** offices.
Fewer than 75 members were present.
Less than a quorum attended.

Incorrect

Less than 75 members were present.

The new building has **less** offices.
Under 75 members attended.
The new building has **under** 10 floors.

Exception

Using the XYZ system, you can order and receive loan history information online in 24 hours or **less**.

(In this exception example, although hours **are** countable, **less** is appropriate because "24 hours or less" can be regarded as a single entity.)

file names

The external names of files. Use two words. Can be used as an adjective or a noun.

following

- Use **following** to introduce art, a table, procedures or, in some cases, a list.
- If **following** is the last word before what it introduces, follow it with a colon.

Correct

The **following** table compares several rates.
To install the program, do the **following**:

Incorrect

The table below compares several rates.
To install the program, do the **following**.

gerund

A verbal (nonfinite verb) ending in **-ing** that functions as a noun.

grow

Jargon; do **not** use (unless you are describing vegetables).

Correct

Sally plans to grow squash and beans in her garden.

Incorrect

The CEO hopes to grow the business in the future.

if, whether

- Use **if** for uncertainties or conditionals.
- Use **when** for situations requiring preparation or the passage of time.
- Use **whether** for one or more alternative possibilities or situations.

Correct

The printer might insert stray characters **if** the wrong font cartridge is selected.
If the document will not print...

Incorrect

The printer might insert stray characters **when** the wrong font cartridge is selected.
To find out **if** TrueType fonts are available...

When the document will not print...

If the document is ready to print...

impact

- Do not use as a verb—it's jargon. Use **affect** or another synonym instead.

Correct

Sending an inappropriate email message can adversely **affect** a person's career.

Incorrect

Sending an inappropriate email message can adversely **impact** a person's career.

in order to

- **In order to** is verbose; just use **to** instead.

Correct

To open the program, click **File, Open**.

Incorrect

In order to open the program, click **File, Open**.

inbox

In Outlook, a folder in which incoming messages are stored. As a physical entity, a tray, basket, or similar item used to hold incoming letters, messages, or documents.
Use one word.

infinitive phrase

In procedure topics, a phrase that begins with "to" and ends with a colon. It introduces a set of steps that accomplish a task, and restates the topic title in singular form. A single procedure topic may have multiple related tasks and therefore multiple infinitive phrases. An example of an infinitive phrase for a topic named "Processing Western Union Payments," is **To process a Western Union payment:**

in, into

- **In** indicates within the limits, bounds, or area of a place or object.
- **Into** implies moving from the outside to the interior of a place or object.

Correct

A word is **in** a paragraph, but text is moved **into** a document.

Data is **in** the cell of a worksheet.

A file name is **in** a list box.
A workstation is **in** a domain, but resources are **on** servers.
Edit the cell contents **in** the formula bar.
Open multiple windows **in** a document.
Insert the disk **into** a disk drive.
Programs run **with, on** or **under** an operating system, not **in** them.
Data is **in** a field, **on** a window.

input

Avoid using as a verb; use **type** instead.

Correct

Type new text to correct the original.
Their **input** was very helpful.

Incorrect

Input new text to correct the original.

Internet, intranet

The term **Internet** (capitalized) refers to the worldwide collection of networks that use TCP/IP (Transmission Control Protocol/Internet Protocol) to communicate with one another. The Internet offers a number of tools, including email, the World Wide Web, and other communication services.

The term **internet** (lowercase) refers to any large network made up of a number of smaller networks.

- In general, avoid use of the lowercase term or define it so that it is not confused with the **Internet**.

intranet

An **intranet** (lowercase) is a communications network based on the same technology as the World Wide Web, but it is available only to certain people, such as the employees of a company.

Correct

Log on to the **Internet** to find the Web site.
The information can be found on the company's **intranet**.

Incorrect

Log onto the **internet** to find the Web site.
The information can be found on the company's **Intranet**.

irregardless

Should be **regardless**.

Correct

Regardless of the consequences, they continued on course.

Incorrect

Irregardless of the consequences, they continued on course.

its, it's

- Differentiate between the contraction **it's** (it is) and the possessive pronoun **its**.
- Never use an apostrophe with possessive pronouns (not their's) or to denote the plural of a singular noun.

Correct

It's easy to take advantage of many new features in the software.
The easy connection to other systems is just one of **its** many advantages.
The software is **theirs**.

Incorrect

The software is **their's**.
Its important to follow the rules.

judgment

This word is often misspelled.

Correct

judgment

Incorrect

judgement

matrix, matrices

Note the spelling of the plural form.

Correct

The **matrix** consists of questions and answers.
All of the **matrices** are aligned.

Incorrect

All of the **matrixes** are aligned. (While grammatically correct, this term is nonstandard and seldom used; it is also more cumbersome and awkward than **matrices**.)

more than, over

- Use **more than** to refer to quantifiable figures and amounts.

Correct

The company funded **more than** 18,000 loans last month.

Incorrect

The company funded **over** 18,000 loans last month.

- Use **over** to refer to a spatial relationship or position or in a comparison in which **more** is already used.

Correct

After you compress your drive, your disk will have **over** 50 percent more free space.

multicolumn lists

Lists of similar entries arranged in multiple columns. While a multicolumn list has the appearance of a table, it is not a table.

nonpublic personal information

Nonpublic personal information (NPI) consists of combinations of the following:

- Name
- Address
- Bank account number
- Credit or debit card number
- Driver's license or state ID card number
- Education
- Employment history
- Passport number
- Physical characteristics or description
- Signature
- Social Security number
- Telephone number

off, off of

Do not use **of** after another preposition; for example, **off of** or **outside of**.

Correct

The taskbar is **outside** the main window area.
Save the file, and then log **off** the network.

Incorrect

The taskbar is **outside of** the main window area.
Save the file, and then log **off of** the network.

offline

Offline is one word in all instances; do not hyphenate it.

off-site

Hyphenate

on

Use **on** with the following Windows elements:

- Menus (the **Open** command is **on** the **File** menu)
- Taskbar, toolbar, ruler, and desktop (click **Start** **on** the taskbar)
- Windows (The **View** tab is located **on** the **Options** window.)
- Disks, in the sense of a program being **on** a disk
- Interface (it can be seen **on** the user interface)
- A computer screen (the window appears **on** the screen)
- Network (The printer is **on** the network.)
- Data is **in** a field, **on** a window

Correct

Click the right mouse button.

Click the **WordPad** icon.

Click **OK**.

Press **Enter**.

Incorrect

Click **on** the right mouse button.

Click **on** the **WordPad** icon.

Click **on OK**.

Press **on** the **Enter** key.

once

- To avoid ambiguity, do not use as a synonym for **after**.

Correct

After you save the document, you can quit the program.

Incorrect

Once you save the document, you can quit the program.

online

- Online is one word in all instances; do not hyphenate it.
- **Online** is worth avoiding much of the time because it can be interpreted ambiguously. **Online** is now generally understood to refer to the Internet, but in such contexts it is better to be specific. It is also used to refer to data that resides on a computer. If you must use **online**, especially in the sense of data that resides on a computer, be explicit about your meaning so that your readers cannot misunderstand you.

Preferable

Many support services are available on the World Wide Web.

Many products include documentation on the CDs in the package.

Acceptable

Many support services are available **online**.

Many products include **online** documentation on the CDs in the package.

Incorrect

Many products include **online** documentation.

on-site

Hyphenate. An adverb meaning "accomplished or located at the site of a particular activity or concern."

onto, on to

- Use two words (**on to**) for the action of connecting to a network.
- Use one word (**onto**) to indicate moving something to a position on top of something else.

Correct

Log **on to** the network.

Drag the icon **onto** the desktop.

Incorrect

Log **onto** the network.

Drag the icon **on** the desktop.

ordered lists

Lists that have a sequence or order.

For vertical ordered lists, use Arabic numerals with periods for the first level, lowercase letters with periods for the second level, and lowercase Roman numerals with periods for the third level. Avoid third-level ordered lists whenever possible by rewriting the material.

ordinal numbers

Numbers that express degree, quality, or position in a series, such as first, second, and third.

parenthetical plurals

Plural forms of words created by typing (s) or (es). These much-criticized constructions are hard to read and, in many cases, present subject-and-verb agreement problems.

Correct

Provide full addresses and telephone numbers for all applicants.

Incorrect

Provide full address(es) and telephone number(s) for all applicants.

prepositions

Important structural words that express relationships—in space, time, or other senses—between nouns or pronouns and other words in a sentence.

Examples: about, above, across, after, against, along, among, around, as, at, below, before, behind, beneath, beside, between, beyond, by, down, during, except,

for, from, in, inside, into, like, near, of, off, on, onto, out, over, past, regarding, since, through, toward, under, until, up, with, without.

preventative, prevent

- **Preventative**, while grammatically correct, is longer and more cumbersome than **preventive**.
- **Preventitive** is never correct.

Correct

It was necessary to take **preventive** measures.

Take the necessary **preventive** measures to protect the file.

Incorrect

Take the necessary **preventative** measures to protect the file.

principal, principle

Distinguish between **principal**, an adjective or noun meaning "chief" or "chief official," and the noun **principle**, meaning "fundamental truth."

proper adjectives

Adjectives formed from proper nouns.

Examples: Brazilian, Orwellian, Hellenic

proper nouns

Nouns that name specific persons, places, and things.

Examples: Mother Teresa, San Francisco, the San Diego Freeway

screenshot

Use this name (**one word**) for a screen or window image, instead of "screen capture" or "screen example."

sentence-style capitalization

In this style of capitalization ("sentence caps" or "sentence case") only the first word in a title, the first word in a subtitle, and any proper names are capitalized.

serial comma

The comma in a list of more than two items that separates the last item from the next-to-last item. Also called the series comma, Oxford comma, and Harvard comma. Data Trace uses the serial comma.

Examples

The manager, supervisor, or team leader reviews the draft.

slashed constructions

A writing shortcut that combines two or more words or phrases with slashes and results in diminished clarity for the reader. Do not use this technique. Separate the words or phrases with conjunctions (and, or) or use another method to explain the relationship between or among the parts. See [Slash](#) for correct and incorrect usage examples.

Exceptions:

- The terms **read/write** and **input/output** are well-established in the information systems field in slashed form. (Note, however, that **read-only** is always hyphenated.)
- The term and/or is acceptable.

Social Security number

Describe as Social Security number (small "n" for number). The acronym is SSN (all caps).

that, which

- Use **that** with a restrictive clause—a clause absolutely necessary to the sentence.
- Use **which** with a nonrestrictive clause—a clause that adds descriptive matter, but is not necessary to the sentence.
- Use a comma before the word **which**.

Correct

This is the project **that** will launch his career.

He was glad **that** they understood his point.

Use the instructions **that** came with the program.

The executive committee, **which** is made up of vice presidents, has not discussed the problem.

The report was not ready, **which** was disappointing.

Incorrect

This is the project **which** will launch his career.

Use the instructions **which** came with the program.

The executive committee, **that** is made up of vice presidents, has not discussed the problem.

that, who

When referring to people, use **who** or **whom**; use **that** for references to places or things.

Correct

Custom Setup is for experienced users **who** want to alter the standard configuration.

That is the software **that** was ordered last week.

Incorrect

Custom Setup is for experienced users **that** want to alter the standard configuration. Everyone **that** is interested should attend.

Custom Setup is for experienced users **whom** want to alter the standard configuration.

their, them

Avoid using the plural form for named or homogeneous groups (collective nouns).

Correct

The **Legal Department** revised **its** procedures.

The executive council made **its** concerns known.

Incorrect

The **Legal Department** revised **their** procedures.

He assured the council that **their** concerns were unfounded.

then

- Then is **not** a coordinating conjunction and thus cannot correctly join two independent clauses. Use **and** or another coordinating conjunction to connect independent clauses, especially in a two-part procedural step.
- Introduce the final clause of a two-part procedural step with a comma (not a semicolon) and the words **and then**.

Correct

On the **File** menu click **Save As, and then** type the name of the file.

Incorrect

On the **File** menu, click **Save As; then** type the name of the file.

- Avoid using **then** to introduce a subordinate clause that follows an **if** clause (an "if...then" construction).

Correct

If the new software arrives on time, we will have it installed by Friday.

Incorrect

If the new software arrives on time, **then** we will have it installed by Friday.

third party vs. third-party

- Hyphenate third-party when the term is used as a compound adjective.
- Do not hyphenate third party when the adjective "third" modifies the noun "party."

Correct

Third-party software is reusable software, designed to improve the efficiency and quality of developing custom applications.

This is the **third party** she has thrown this summer.

title caps

Using "title caps" refers to following these guidelines for capitalization of titles:

- Capitalize all nouns, verbs (including **is** and other forms of **be**), adverbs (including **than** and **when**), adjectives (including **this** and **that**), and pronouns (including **its**).
- Capitalize the first and last words, regardless of their parts of speech ("The Text to Look For").
- Capitalize prepositions that are part of a verb phrase ("Backing **Up** Your Disk").
- Do not capitalize articles (**a**, **an**, and **the**) unless the article is the first word in the title.
- Do not capitalize coordinate conjunctions (**and**, **but**, **for**, **nor**, **or**) unless the conjunction is the first word in the title.
- Do not capitalize prepositions of four or fewer letters unless the preposition is the first word in the title.
- Do not capitalize **to** in an infinitive phrase ("How **to** Format Your Hard Disk") unless **to** is the first word in the title.
- Always capitalize the first word in a hyphenated word in a title. Capitalize the second word only if it is a noun or an adjective or is as important as the first word (State-**S**pecific Lending Requirements). Do not capitalize the second word if it is another part of speech or a participle that modifies the first word (Applying Stage Make-**u**p).

unordered lists

Lists that do not have a sequence

Use the following bullet styles for unordered lists:

- A solid circle for a first-level list
- A solid square for a second-level list
 - An open circle for a third-level list

URL

An acronym that stands for uniform resource locator. An address for a resource on the Internet. A URL is used by Web browsers to locate Internet resources. It specifies the protocol to be used in opening the resource (such as http: for a World Wide Web page or ftp: for an FTP site), the name of the server on which the resource resides (such as //www.whitehouse.gov), and, optionally, the path to a resource (such as an HTML document or a file on that server).

utilize, utilizing

Do not use. Write **use** for utilize and **using** for utilizing.

via

The word **via** means

- By way of (in a geographical context, as in "I traveled to the Grand Canyon via Phoenix and Flagstaff, Arizona")
- By means of (when specifying a method of delivery)

Correct

Send the mortgage documents to the title company **via** FedEx within 24 hours of signing.

WebHelp

An uncompiled form of HTML-based help that runs on a variety of browsers and platforms. WebHelp is a registered trademark of Adobe Systems Incorporated (formerly Macromedia, Inc.).

Web, Webmaster, Web page, Web site

- The word "Web" is always capitalized.
- A Web page is referred to with two words.
- A Web site is referred to with two words.
- Although lowercase is used for job titles (except when they appear in headings and subheadings), use a capital "W" for Webmaster (one word).
- Use the verbs **open** and **close** with a Web page.

Correct

Open the company Web page to find a current mailing address.

The **RefDesk.com** Web site is very helpful to writers.

Send an email message to the ADS Webmaster.

Close the Web page before continuing.

In **Google**, type the keywords **Italian restaurant Orange County CA** to search the Web for places to eat.

who, whom

Whom is the object of a verb; **who** is a pronoun. Do not use **whom** in place of **who**.

Correct

Custom Setup is for experienced users **who** want to alter the standard configuration.

That is the person to **whom** they were referring.

To **whom** am I speaking?

Incorrect

Custom Setup is for experienced users **whom** want to alter the standard configuration.

To **who** am I speaking?

Information Designer QA Checklist

Use to QA each book to be sent to IDD review

Summary	About	Process Flow	Business Policy	Procedure 1	Procedure 2	Procedure 3	Procedure 4
Page Header							
Is the header present and have the correct information?							
Breadcrumbs							
Do all links work, point to the correct topics, and match topic titles exactly?							
Does the heading start with About ?							
Is the current topic link (and the word Summary) removed?							
Is the link to the Summary page (w/o the word Summary) included?							
If combined or combined-nonviewable topic, are breadcrumb links to highest common book?							
Topic Heading							
Does the heading end with the word Summary ?							
Is the first bulleted line after a sentence in Compressed style?							
Does the heading end with Process Flow ?							
Does the heading start with a gerund (-ing word)?							
Is the heading in plural form, if possible?							
Summary Overview/Introduction Paragraphs							
Is there a summary, overview, or introduction?							
Are paragraphs in Normal style?							
Are bulleted lines in Compressed style?							
Is the Process Flow FYI (about procedure links) included?							
Summary Page - Topics Section							
Is the About page the first topic listed?							

If a Business Policy is included, is it the second topic?							
If a Process Flow is included, is it the second topic (third if a Business Policy is included)?							
Does the Process Flow topic include the words Process Flow ?							
Is the first topic link in Normal style and subsequent topic links in Compressed style?							
Do all links work, point to the correct topics, and match topic titles exactly?							
Do the topic titles match the TOC topic titles exactly?							
About Page - Rules and Guidelines							
Is the first line (sentence or bullet) in Normal style?							
Is the first bulleted line after a sentence in Compressed style							
Is the hierarchy of bulleted lists: • then ■ then o ?							
Do Rules contain words such as must or required , if possible?							
Do Guidelines contain words such as should , can , and might , if possible?							
Has the Rules or Guidelines section been deleted if no rules or guidelines are stated?							
Process Flow - Diagram							
Does the process flow begin with the standard arrow describing the triggering event?							
Do statements in the rectangular boxes begin with an active verb and first letter capitalized?							
Is the ending period omitted from the rectangular box statement?							
Is text in the decision shapes (diamonds) in question format?							
Are articles (a, an, the) omitted, if possible?							
Do all Procedures links work and point to the correct topics?							
Are all Yes and Nos within (not next to) arrow lines, if possible?							
Is a border around the diagram omitted?							
Procedures - Subheadings and							

Role Name							
Does Heading 2 read Procedures (plural) if there is more than one set of numbered steps?							
Is the department capitalized and job title all lowercase in RoleName?							
Does the RoleName appear after Heading 2 and before Heading 3?							
Does Heading 3 (infinitive phrase) start with To and end with a colon?							
Is Heading 3 in singular form, and does it mirror/rephrase the topic heading, if possible?							
Procedure Steps							
Is the first step in Normal style?							
Are subsequent steps in Compressed style?							
Is the procedure numbered correctly (no missing step numbers/letters)?							
Do steps begin with an active verb, if possible?							
Is parallel sentence construction used in the steps?							
Is the hierarchy of numbered lists: 1, 2, then a, b, then i, ii?							
Is the hierarchy of bulleted lists: ¶ then § then o ?							
Is a bullet used rather than a number if a single step procedure?							
View/Hides							
Are view/hides in ViewHideDetails style?							
Do all view/hides open?							
Are all view/hide items in Compressed style?							
Are view/hide items indented properly?							
Images							
Are image links in ImageLink style?							
Do all image links open?							
Are images in Normal style?							
Do images appear in proper sequence?							
Are images linked to actions, if possible?							
Do red arrows on images point to the correct actions?							
Are red brackets used rather than multiple arrows, if possible?							

Are hotspot pop-ups in the proper format (field name bold, left justified, and matches screen's field name exactly)?							
Do images have standard gray borders?							
Is nonpublic information on images blurred?							
Tables							
Does the table follow the template style?							
Is the table left justified with the corresponding text?							
Is the table text aligned correctly (left justified, top of cell)?							
Is the first line of text within a cell in Normal style?							
Are subsequent lines within a cell in Compressed style?							
See Also							
Is the See Also button present and working?							
Are all relevant topics (including combined) listed in See Also?							
Do See Also topic titles match TOC topic titles?							
Revision Date and History							
If a new topic, does Revision History read First published (new topic) ?							
If not a new topic, does Revision History state the changes?							
DIN							
Does a two-character prefix identify the department?							
Does the Process Flow DIN end with 1-1 (2-1 if second Process Flow, 3-1 if third, etc.)?							
Does the DIN include CB (after the department prefix) if a combined topic?							
Does the DIN end with -NV if a nonviewable topic?							
General							
Is the topic free from spelling, grammar, punctuation, capitalization, and spacing errors?							
Is boldface type used for names of							

screens, windows, pages, fields, buttons, menus, commands, user input, and Web sites?							
Are numbers between zero and nine spelled out (unless associated with dates, times, etc.) and in number format if 10 and over?							
Is the first letter capitalized in bulleted lines?							
Are FYIs and Importants (and subsequent colons) boldface?							
Are statements following FYI and Important statements in Compressed style?							
Do topic links appear in blue underlined text?							
Do all links work, point to the correct topics, and match topic titles exactly?							
Do linked topics open in the active window (Page Default) for topics within the project?							
Do linked topics open in a New Window with a TOC for topics outside the project?							
If linked topic is nonviewable, does topic open in a New Window without a TOC?							
Do glossary terms appear in green underlined text?							
Does the glossary pop-up window/text appear in proper format (blue banner, lowercase term unless proper, and description in sentence structure)?							
Do baggage files appear in blue underlined text?							
Do baggage files work and do links open in a New Window?							