

The HCl Style Guide for Technical Documentation

Foreword

This style guide was produced by the project managers of HCl, whose collective technical writing and quality systems experience extends over many years. We acknowledge the debt we have as practitioners to the many authorities and the authors of more comprehensive and detailed guides and reference works – and where appropriate we refer you to them specifically. Wider reference across such a diverse field is in any case essential.

The HCl guide is designed for routine, practical use – inevitably you will find many reasons to look beyond it – but it covers a reasonable amount of the ground commonly in play with most technical documents. The Microsoft Word template that accompanies it can and should be adapted for specific contexts as required.

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About HCl

Established in 1981 in Sydney, HCl is a leading provider of documentation and consultancy services.

We develop, edit and structure documentation for the large and complex information sets critical to an organisation's success. These information sets typically include:

- user manuals, system manuals, and online help
- corporate policies and procedures manuals
- intranet and internet content
- quality assurance system implementation and compliance

We also assist our clients with:

- technical writers for contract and permanent positions
- knowledge management
- plan development, online information systems development
- useability testing
- training for quality assurance and process improvement

About this document

This document has two functions:

- It sets out style notes to provide clear rules for many of the common issues of style and formatting in technical documentation. These style notes reflect HCl's 'house style'.
- It describes how to use the HCl Microsoft Word template.

About the style notes

The style notes are applicable generally to any kind of documentation task. They do not attempt to be exhaustive but aim to define practical ways of dealing with many typical style issues. The notes have been written keeping in mind the kind of documents that can be readily produced using HCl's Microsoft Word template (see below)—user guides, reference manuals, policy and procedures manuals. Use these style notes as a basis for making some of the routine decisions that you need to make for any kind of technical writing. Refer to the expert resources referenced in it, and to other appropriate resources, for more detailed and authoritative guidance.

About the HCl Microsoft Word template

The HCl Microsoft Word template is designed specifically for use together with third-party help authoring tools such as RoboHelp. By utilising the document conversion processes of these tools, Microsoft Word documents based on the template can be readily converted to online formats such as WinHelp, HTML and HTML Help. Also, the documents that are produced in this way, which in the first instance are 'paper-based' documents, require little further processing to become highly usable online documents. This approach is an effective way for having a single-source for different output requirements.

Since the template requires you to create documents that adhere to a fairly simple but strict hierarchical organisational structure, using a limited but well-considered set of styles, documents based on the template can readily be moved down avenues other than the one offered by these tools.

As an example, we have produced a FrameMaker version of the Style Guide formatted using a FrameMaker version of the template (both the Microsoft Word and Adobe FrameMaker versions of the template are available from our website—visit the HCl website at: www.hci.com.au/downloads).

When you are working in documents based on the HCl template, set the document view to Normal View and display the Style area on the left margin. This allows you to see at a glance which styles are applied to each of the elements of the document.

Style attributes

Indents, font face, font size and paragraph spacing do not affect the function of the template, and may be changed as required for the purposes of the document you are producing. In this way treat the template as a ‘basis’ for customising a document’s look and feel – not as a prescriptive formula to which you must strictly adhere.

Elements of style and formatting

This section provides a reference on typical aspects of style and formatting. Some of it is conceptual and some of it sets out precepts. The precepts are HCi's 'house style'.

While it is true that there are often competing ways to achieve the same end, you should stick to these precepts to:

- ensure consistency
- avoid having to consider them afresh every time you start to write something

The HCi template has been set up to reflect these style rules.

User documentation generally

Contemporary thinking is that user documentation is support information for people performing tasks within a meaningful business context. This may or may not include interaction with computer systems.

HCi's approach, in accordance with IS 15910 (*Software user documentation process*), is to respond to documentation needs in terms of an analysis of audiences, tasks performed and information needs. Documentation produced to this end is 'task-focused'. This focus is reflected and expressed in the titling and organisation of the document elements.

See *Document structure (description of elements)* for a full discussion.

Document structure (hierarchy of elements)

The relationship of topics (or sections) within a document to each other forms the document's structure. The structure of documents using the HCi template has a clear purpose. This is to allow the conversion of those documents to an online format using a help authoring tool (as well as to allow direct printing of the document). It is a feature of the conversion process for most help authoring tools that the heading level structure of the 'source' document provides the organisational structure of the online output.

A mandatory requirement for Microsoft Word documents created based on the template is that they conform strictly to the heading level hierarchy. This means:

- there are no gaps in the hierarchy such as jumps from Heading 2 to Heading 4
- only one instance of Heading 1 exists for each document

The hierarchical structure of every document must be able to be represented as a true 'tree structure' based on the heading levels used.

Document structure (description of elements)

The titles of chapters, sections, sub-sections etc within a document, are typically derived from an analysis of the tasks that the audiences for the document perform. Because user documentation aims to be ‘task-focused’ the titles (headings) should be expressed, where possible, as tasks, for example ‘Maintaining ...’, ‘Creating ...’, ‘Using ...’, ‘Loading ...’, etc.

At the highest level (for example chapter), the task title should function as an effective description of the sub-tasks the chapter contains, for example:

Chapter 1. Using System X

Starting System X

Logging on

Logging off

Navigating System X

Changing your password

This is a good principle – but a good exception exists, and that is when the ‘container’ description is more meaningfully expressed with a ‘noun’ label (ie as a ‘general subject area’ as opposed to a ‘task’). Use topics when you are dealing with reference-focused information, for example ‘Glossary’, ‘Index’, ‘Basic Operations’. You may also opt for a noun label when considering task-focused information where:

- an area or stream of business activity is widely recognised within the business context by an existing noun label, for example ‘Debtors’ (to title it ‘Managing debtors’ or ‘Processing debtors’ would actually prevent the audience from readily grasping what it was about)
- tasks do not really belong thematically to a single ‘container’ task, for example ‘About System X’, ‘Elements of style and formatting’
- the effort to frame an area of activity as a task ends up relying awkwardly on the same vague verb, for example ‘Processing this...’, ‘Processing that...’, ‘Processing something else...’

The task of defining and naming the organisational elements in any document typically involves considering the wording as either task or noun-label topic. You will probably use a combination of both **but remember**, tasks are what people do, not topics.

Headings and sub-headings

Typically, each heading that is assigned a style from Heading 1 to Heading 8 generates a separate online topic when the document is converted to online using a help authoring tool. The use of headings in the document should reflect a well thought-out structure for the information – not just the linear creation of topic after topic or the continuing nesting of topics within topics to deeper and deeper levels.

An optimal depth of information, for both paper and online, is about three levels for a main section within a chapter. Below this, readers may lose sight of the relationship of information to its container or parent.

If you need to go beyond three levels of heading structure for a main section, consider reorganising the information by creating additional main sections.

If you need to break up a large block of text without creating a new topic, you can use the template Subhead style. The Subhead style is also useful for signposting branches in a procedure (see the sample procedure later in this Guide, titled *Shutting down the workstation*, for an illustration of this).

Formatting and structuring procedures

Procedures are sets of step-by-step instructions that describe how to carry out a task. Procedures are typically linear in sequence, but may need to branch or break sequence where a decision results in the possibility of more than one outcome.

Whether a procedure is linear or not, the format of a procedure should always be the same. To follow the procedure the user should:

- follow all the steps in sequence from first step to last, so that the last step concludes the business task that the procedure is describing *or* they are passed to another procedure where the same holds true
- need to perform only those steps given in the procedure (or a procedure to which they are passed) in order to complete the task – and need do no more than those steps

In other words, the steps of a procedure must fully address the description of the procedure and the procedure should be self-contained.

Assumed knowledge

You need to be aware of your audience's existing knowledge as part of the analysis for your document, and pitch the content in line with their needs. Their knowledge however should grow as they work from your document, and you need to be clear on the order in which you present information.

The starting point for any procedure is the assumed existing level of knowledge of the user. Your document, and the component elements of it, should work in a direction from the general to the particular. Any prerequisites for a task should be specified up front.

Note:

You can cover off or build assumed knowledge in generic procedures and overview chapters (such as 'About System X' and 'Using System X') up front in your document. The knowledge to do certain things, for example how to navigate to a menu option, can then be taken as read.

Overviews

Overviews provide an introduction to what follows. They are the means for setting the scene for the procedure steps or for more detailed information. It is good practice to always introduce detail with an overview, for example:

Doing X

X is a simple activity that can be done in stages over time or in entirety in a single session. When doing X you must...[↔ this is the overview]

To do X:

1. Open the...
2. Ensure that the...

etc

It is a good idea to have a hierarchy of overviews operating within a document such that at each level, all information is formally introduced. In this way, the introductory chapters of a reference document or user or procedures guide should in effect be the highest level overview. Each section of a chapter (eg task) should have a formal overview. Beneath this, each sub-section (eg sub or component task) should have the option of carrying an overview if any information needs to be expressed up front.

Branching and non-linear procedures

Branching and non-linear procedures are a common area of difficulty for writers. Procedures should not take a user into territory where the next step may not clearly follow, for example:

1. Select an entry from the drop-down list.

The Processing screen displays where the selection is valid.

2. Enter details to the Processing screen.

What if the selection in Step 1 is *not* valid? The following example shows how to deal with 'if' scenarios:

1. Select an entry from the drop-down list.
 - If the selection is valid, the Processing screen displays. Go to Step 2.
 - If the selection is not valid, contact the Debtors Supervisor. The Debtors Supervisor needs to create a new client record before processing can be completed.
2. Enter details to the Processing screen.

See also the *Sample procedure* in this document, titled *Shutting down the workstation*, for an example of how to handle branching along three paths.

Procedures that span audience roles

Sometimes elements of a procedure are performed by more than one ‘actor’. Documenting procedures that span the roles of multiple actors can be useful to formally express what is done from the viewpoint of the business unit or organisation as a whole (as opposed to the individual). This kind of procedure documentation is known as ‘playscript’.

You should consider carefully if the ‘bird’s eye’ view offered by playscript is the viewpoint you should be writing from. An individual may not recognise the component activity they perform in a multi-role procedure when it is labelled from the business perspective, ie the multi-role business procedure may be titled ‘Processing a client payment’. The individual in the mail room may only open the mail and put it into appropriate in-trays as a subset of steps in the larger process. They may view their task as ‘Processing the mail’ and not recognise it as part of ‘Processing a client payment’.

Effective audience and task analysis will determine the best approach.

The example below shows a simple linear way of indicating that a specific actor does a specific task by use of subheads. Tables are often used for playscript (though keep your table formatting simple).

Example ‘playscript’ procedure

Mailroom clerk

1. Open the mail.
2. Sort the mail by invoice type into the appropriate in-trays.

Accounts Payable clerk

3. Process the payment details.

Supervisor

4. Authorise the payment.

Procedure structure

A simple formula that can be repeated for any procedure is:

- task title
- overview
- cue
- sequence of actions and results

Consider the following:

<i>Task title</i>	Starting System X
<i>Overview</i>	Starting System X involves logging onto Syscorp's mainframe. You need to have a logon ID and password for System X, as well as a Terminal User password. Both of these can be obtained from the System Administrator.
<i>Cue</i>	To start System X:
<i>Action</i>	1. At the Syscorp User Applications screen, click the System X icon.
<i>Result</i>	A dialog box displays prompting for a logon ID and password.
<i>Action</i>	2. Enter your logon ID and password.
<i>Result</i>	The System X menu displays: [menu screenshot]

Task title

The task description.

Overview (optional)

Information, concepts and background the user needs to know beforehand.

Cue

A stock format phrase, setting the task title in the infinitive, for example Doing X (title).....To do X: (cue). The 'cue' phrase indicates that the first numbered step of the procedure follows.

Action

A numbered step. This usually begins with, and always contains, a single imperative, for example 'Choose', 'Click', 'Select', and so on. These terms are sometimes confused. Use them as follows:

- **Choose.** Use when referring to a menu option, eg 'choose the File | Print option (note the use of '|' to separate options).
- **Click.** Use when referring to a button, eg 'click the OK button', or 'click OK' (when it's clear that what you are clicking is a button).
- **Select.** Use when referring to an item in a list, eg 'select the A4 option from the dropdown list'.

Result (optional)

A description of the action, if required. It may include a screenshot (introduced with another formula phrase), or qualifying or elaborating information. Always set the result on a new paragraph of Body Text.

Abbreviations and acronyms

The first time an abbreviation or acronym is used, define the term within the text. Make sure the term is also specified in the glossary.

Show acronyms without any punctuation, for example NATO rather than N.A.T.O.

Appendices

In paper manuals, an appendix often contains material such as reference data, tables and background material.

Sometimes the appendix concept may not translate well to online format. Rather than creating an appendix for peripheral or supporting material, try to either:

- structure the material within the body of the document to which it relates, *or*
- create another, separate chapter or section for the peripheral material. This is not an ‘appendix’ but just another chapter or section within the manual

Using numbered steps

Each numbered step expresses a single action in the sequence of actions which make up a procedure. Analyse the actions involved in a procedure and aggregate them into a sequence *of the same order*. This means not having steps that read like:

1. Do something enormously complex and multifaceted.
2. Do something extremely trivial.
3. Do another extremely trivial thing.
4. Do something enormously complex and multifaceted.

Defining the steps of a procedure is a ‘task analysis’ activity. Procedural actions may be of a type that indicate explicit, simple actions, or they may be at a level that indicate complex actions, the components of which are not explicitly enumerated in the procedure. Whatever the audience need, aim to have a consistent level or order of action in a procedure.

Tip

Make more procedures if the requirement is to express explicitly the actions in a complex process – do not make enormously long sequences of steps.

Using bulleted lists

Bulleted lists are for listing items that are not necessarily sequential. Use numbered lists for a sequential list, and bulleted lists where the order of the listed items is immaterial.

Here is an example of when to use a bulleted list:

There are three important things to remember:

- red thing
- green thing
- blue thing

If a proper depiction of the ‘things’ is not truly dependent on the sequence in which they are listed, use a bulleted list and save numbered steps for procedures.

Second level of bullets

Bulleted lists can be nested a level, eg

Do not forget to:

- put the cat out
- put the recycling out, remembering the:
 - papers
 - bottles
- lock the door

Punctuating bulleted lists

Bulleted lists are introduced by a colon. Do not place full-stops or commas after each item or at the end of the list. Do not use ‘and’ before the last bullet point. If you include a complete sentence in the body of a single list item, punctuate it as you would any complete sentence, for example:

When you shop, ensure you buy:

- meat
- fruit
 - apples. Check that the type you buy is in mid-season.
 - oranges
 - pears
- cereal

See *Punctuation* for more details on punctuating.

Table layout

Keep tables to a maximum of three columns, if possible.

Shading of cells does not translate well via the conversion tools to online, though it may be OK for paper.

Using emphasis

Conventions of typographical emphasis

Emphasis can be achieved by the use of:

- initial capitals
- italics or bold
- the Rule style (see *Creating a note (emphasised paragraph)*)

Avoid visual overload. Do not clutter your pages with italics, bold, bold italics. Never use underline or capitals. Resist using exclamation marks with your last ounce of strength!

Initial capitals

Use initial capitals for:

- screen elements that use initial capitals, such as field names and screen names in a system, for example Address field, Customer Details window
- job roles, such as Product Manager
- terms which are proper nouns (of course), or which may function as proper nouns within the context, for example the Audit Scheme

Tip:

If unsure, put it in lower-case first. If the text reads understandably, leave it as it is (you'll be surprised how much you will leave in lower-case). Only use the typographical emphasis afforded by initial caps if the importance of the term compels it.

Italics

Use italics for cross-references and for emphasis of single words or phrases. Be sparing in the latter.

Bold

Do not use bold if you can help it, unless there is a particular need for an additional form of emphasis.

The Rule style

Use the Rule style for a note or whole paragraph setting out special or important information that you want to foreground. Use it sparingly. See *Creating a note (emphasised paragraph)*.

Using graphics

Graphics, such as flowcharts, diagrams and screenshots, are valuable aids in technical communication. Many deep and meaningful guides to the use of graphics have been written, and we have distilled these as follows:

Consistent use of graphical elements

Have a specific purpose for the inclusion of graphics and use them consistently. One strategy, useful in itself, is to include graphics to ‘break up’ the flow of text. This punctuates the text and allows easier absorption of information.

Pay attention to consistency of appearance of related graphics, for example in terms of image resolution, scaling and so on.

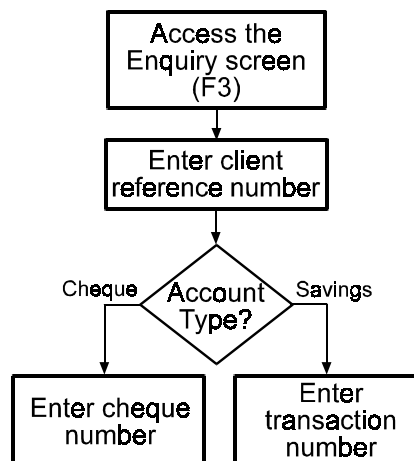
The position of graphics on the page is important. Use the top right and bottom left of the page for graphical elements where possible. See Colin Whieldon’s *Communicating or just making pretty shapes* for more information about graphical elements.

See *Screenshots* about how to document systems for end users.

Flowcharts for procedures

Flowcharts are often used to summarise procedures and illustrate process flows, which are then documented in detail. If you are using a flowchart in this way, ensure the steps summarised in them ‘match’ the steps expressed in the text, for example:

Flowchart



Procedure

To process the transaction:

1. Press F3 to open the Enquiry screen.
 2. Enter the client reference number into the CRN field and press Enter.
The client details will be displayed.
 3. Note the Account Type.
 4. If the Account Type is Cheque, enter the cheque number into the CN field.
 5. If the Account Type is Savings, enter the transaction number into the TN field.
- ...etc

Screenshots

Screenshots are important to most paper manuals (and to a much lesser degree, online manuals) dealing with use of systems. A paper manual must be expected to function away from the computer – so including illustrative screenshots is valuable. It helps make paper-based systems documentation into a learning tool. Online, the expectation is that the user can see the application, so replicating masses of screens is redundant.

See *Sample procedure* for an example of the use of screenshot graphics.

Choosing screenshots to include in systems user documentation

Establish clear conventions in advance for including screenshots. Try this:

- **For generic sections (both paper and online)** such as how to navigate or how to perform basic operations, include screenshots to illustrate each aspect of the interface you are documenting. Make excerpts to illustrate component features. For individual procedures—for example logging on—use separate shots to

show initial and changed states for the screen in the course of the procedure (see next point).

- **For specific procedures (paper)** use an initial shot to indicate the ‘arrival state’. This provides confirmation to the user that they are starting from the right place. Use additional shots for each major screen transition.
- **For specific procedures (online)** use no screenshots at all, but state the name of the screen the procedure commences from and describe the major screen transitions, for example ‘a new screen displays to allow you to enter monthly figures...’.

See *Inserting a graphic* for details on the capture, format, resolution and scaling of screenshots.

Punctuation

Punctuation is a matter of style. It is possible to exercise certain choices about how to punctuate. Therefore a principle is called for, and it is this:

Write in sentences. Use the least amount of punctuation required to make the construction of your sentences unambiguous.

See the many authorities on style for detailed analyses and rules.

Lists

Lists use typography to satisfy the requirements of the sentence. For this reason there is no need to put a full stop at the end of list items or even the final item.

Begin the list items from a colon. If you are including full sentences as part of list items, treat them as sentences by beginning them with a capital and ending them in a full stop.

Use lower-case for beginning a list item unless the item is a whole sentence or the first word is a proper noun or a word that would normally have an initial capital

See *Punctuating bulleted lists* for more details and an example.

Colons and semi-colons

Use colons only to launch lists. Use dashes to set off clauses in sentences – they offer greater visual distinction.

Do not use semi-colons.

Hyphens and dashes

Hyphens are for hyphenating. Use dashes to set off text, ie a spaced en measure or flush em measure.

Spaced en – looks like this.

Flush em—looks like this.

Tip:

How to get en dashes and em dashes automatically

Make sure that the ‘Symbol characters (--) with symbols—’ check box is selected on both the AutoFormat As You Type and the AutoFormat tabs (Tools menu, AutoCorrect command).

To enter a spaced en dash, type text followed by a space, one or two hyphens, and then one or no space, followed by more text. Microsoft Word inserts an en dash.

To enter a flush em dash, type text followed by two hyphens (--) followed by more text. Microsoft Word inserts an em dash (—). Do not type any spaces on either side of the hyphens.

Case

Do not use upper-case for emphasis or headings. Use upper-case only for ‘verbatim’ requirements, ie where you are required to cite an official term or word that can only be expressed in upper-case.

Use sentence case for headings.

Use initial capitals for proper nouns and the names of objects, ie screen and field names, which you want to distinguish or emphasise typographically.

Quotation marks

Use single, straight quotation marks.

There are two reasons to use quotation marks:

- to indicate direct speech
- to ‘bracket’ a word in an unfamiliar context

Language

HCl delivers documentation designed for specific audiences and their needs (see *User documentation generally* for a more detailed statement). Appropriateness for audience is the rule when it comes to language.

Some useful precepts are:

- Write in sentences.
- Use the imperative verb form.
- Use the active voice in procedures.
- Use the present tense.

- Use the ‘you’ form of address.
- Use plain English.
- Use job titles/position titles rather than staff names.

Sentences

Write in whole sentences, unless the context and purpose of your writing requires otherwise. This is a basic point, but a good one. To this end:

- Make sure that you include a subject, a verb and an object.
- Do not omit articles, for example ‘click [the] Window button’, as it is painful to read and doesn’t really save space or time.

Imperative

The imperative form of the verb is the most direct form of expression, for example ‘Do [this]...’, ‘Ensure [that]...’, ‘Complete [the]...’. The alternative is to construct sentences passively, for example ‘The form must be completed...’. Choose the imperative for most instructions.

Active voice

It is commonplace to be told in style guides and technical writing textbooks to use the active voice in preference to the passive. There are actually good reasons to use the passive, but if they do not exist, use the active. Here is an example:

Passive The X window is displayed by the system.

Active The system displays the X window.

Active voice is more direct.

Present Tense

Avoid using the future tense, unless you are actually referring to something in the future or something that may be questionable. Using the present tense makes the text simpler and less ambiguous.

For example:

Future The system will display the X window.

Present The system displays the X window.

The future tense here raises the question as to when the X window will be displayed and under what conditions.

'You'

Address the reader in the second person. Consider the following:

Third person The user must ensure...

Second person You must ensure...

There is no ambiguity when using the second person as to who you are writing for.

Plain English

'Plain English' is an approach to using writing that emphasises the value of using clear, simple and direct language.

See Robert Eagleson's *Writing in Plain English* for an authoritative guide.

Job titles / role descriptions

Documents often refer to particular people who perform tasks. Use job titles or role descriptions rather than an individual's name. Job titles are more likely to remain constant for a particular task.

Usage

The following points of usage are offered for reference:

- *OK*: Use all upper-case, eg 'OK', or spell out in full using lower-case, eg 'okay'.
- *Numbers*: Spell out numbers one to ten in full. From 11 onwards, use numerals. For dimensions, amounts, etc always use numerals, eg 'the clearance should be 5 mm ...'. 'The tickets cost \$5 ...'.
- *eg*: Use without full stops, or spell out in full as 'for example'.
- *ie*: Use without full stops to read 'that is' where you provide information that elaborates specifically on the case in point.
- *email*: Use without a hyphen and no initial capital except at the beginning of a sentence.
- *online*: Use without a hyphen and no initial capital except at the beginning of a sentence.
- *setup*: Should be one word when used as a noun, eg 'the setup for this system is ...'. The verb form should use separate words, eg 'set up the system as follows...', etc)
- *logon*: Should be one word when used as a noun, eg 'the logon sequence for this system is ...'. The verb form should use separate words, eg 'log on to the system as follows...', etc). The same applies to *login*, *logout* and *logoff*.

- *internet and intranet*: No initial capital except at the beginning of a sentence.
- *web*: No initial capital except at the beginning of a sentence. If the full term, 'World Wide Web' is used it should have initial capitals.

Cross-referencing

For a paper document, a cross reference needs to direct the reader to another page. Online however, the reference is a hyperlink that can be clicked on to display the topic directly. Putting a reference to a page number therefore is redundant online. A compromise is to word the reference so that it serves effectively for both purposes.

Word a reference to a topic in a way that allows the user to locate that section in the table of contents, for example:

See *Creating a cross-reference* in the section *Using the template*.

Note the following about cross-references:

- Avoid using page number references that may require maintenance ie, if they will not be automatically updated.
- Avoid using page reference fields that are redundant online.
- Be careful using the terms 'above' or 'below' as in 'See the section *Creating a cross reference* above'. These spatial terms can be meaningless online.

Indexing

Indexing is a sophisticated skill. Refer to the appropriate authorities if you want to get a detailed understanding of how to create indexes. A basic index, however, can be fairly easily produced.

How to create a basic document index

This index gives at least two points of access to a topic:

- a 'keyword', or term
- a task type description (derived from the topic headings of the document)

To create a basic document index:

1. Create a topic list for each chapter.

List the terms and 'keywords' that you believe the document audience would relate to that topic area.

2. Create index entries for each topic from the document headings that are relevant, paraphrasing the headings appropriately, for example:

Index

- Creating an index, 6
- How to create a basic index, 9
- Marking an index entry, 12

3. Create a separate topic list for the task types in the table of contents, and index both the appropriate topic terms and document headings (again, paraphrasing the headings), for example:

Creating

- index, 6
- basic index, 9
- index entry, 12

See *Creating an index* for details on how to insert index entries in a document and how to generate the index.

See the index in this document for an example of a basic index.

Glossaries

Glossaries are alphabetical lists of terms and definitions. They can be used in various ways as information locators and directories, and can carry a lot of information where complex terms and concepts need to be set out and made accessible via an alphabetical listing.

A basic glossary, however, should have short definitions, and if required, point back to the body of the document and/or cross reference other terms to pass the reader to more information.

A basic glossary can be built from the same chapter topic lists created for a basic index (see *How to create a basic document index*).

See the *Glossary* in this document for an example.

About the HCl template

The HCl template, **HCl template.dot** (available from the HCl web site) is designed for use in many typical documentation tasks. Apart from its formatting and style elements, which can be customised, it adheres to basic technical writing design and formatting principles and is applicable to most documentation tasks.

The template aims to be a simple, stable and usable way to produce paper and online documents using Microsoft Word and the popular help authoring tools for a variety of documentation needs.

The template answers to the ‘paper-based’ or book paradigm. Many proponents of online documentation, indeed documentation *per se*, hold that this paradigm is outdated, and that a ‘data-based’ paradigm has superseded it (where units of information, even individual words are regarded as items of data). However, the book paradigm is still highly valid and useful, even for the production of online documentation.

Template features

The HCl Word template is:

- **Hierarchical.** The template is designed on a strict hierarchy according to heading level styles.
- **Scalable.** The template can be used to create a complete manual or guide within a single document. Alternatively, multiple documents may be created and compiled to create a document set (requiring the use of Microsoft Word’s master/sub-document function and some extra ‘handling’).
- **Based on a simple style set.** The template relies on a minimal set of styles that caters for most formatting requirements.
- **Flexible.** The template can be used for a range of documentation requirements such as policies, procedures, work instructions, training guides, reference guides.
- **Adaptable.** The template provides a robust and functional baseline which can be developed further with ‘look and feel’ changes, macros for automation, additional styles, alternative layouts, and so on.
- **Portable.** The template does not use the ‘normal’ style, nor is any style based on the normal style. This means that if a document based on this template is opened on a computer which doesn’t have the template available, the normal style in the normal.dot will not cause unwanted changes to the document (a common problem when exchanging documents).

Online version

There is also an online version of the HCl template, **HCl online template.dot** (also available from the HCl web site) which can be used for documents intended for online output. The HCl online template can be used with minimal handling to a range of online formats via Microsoft Word document conversion (through help authoring tools).

Template contents

The word version of this Style Guide, available from the HCl website at www.hci.com.au/downloads, is based on the HCl template and can be used as examples of elements of style and formatting useful for developing end-user and other documentation, as follows:

- headings and sub-headings
- formatting and structuring of procedures
- use of bulleted lists and numbered steps
- table layout
- use of emphasis
- use of graphics
- punctuation
- language
- cross-referencing
- indexing
- glossaries

For more information about each element, see *Elements of style and formatting*.

Using the template

This section briefly explains how to use the HCl template to produce content in the style illustrated by the example content contained in the template.

The HCl template is a ‘flat template’. It contains no automation or interaction. It provides a document layout, example formatting and style list only. To use the template, follow the instructions in this section.

Note:

Before you use the template, see *Producing outputs* for tips relating to the outputs you need to produce.

Loading the template

The template is titled **HCl template.dot**.

To load the template:

1. Copy the template to the User Templates directory you have specified within Microsoft Word, for example C:\Program Files\Microsoft Office\Templates.

Tip

This directory can differ on some systems, particularly networked systems. To find out in what directory Microsoft Word expects to find templates on your system, select Tools | Options | File Locations. This will show you the current settings for User templates and Workgroup templates.

2. When you choose File | New, select the HCl template from the General tab.

Creating a new document based on the template

To create a new document based on the template:

1. Choose File | New.

The HCl template will be available from within the General tab.

2. Double-click the template to open a new document based on the template.

Deciding how many documents to create

You may decide to:

- create a new document for each chapter or major section of your document, *or*
- choose to create only one document which contains all the chapters within it

Size is typically the issue – if you expect your single document to be larger than 1 Mb (approximately 200 A4 pages with a maximum of 50 sixteen-colour bitmaps), break it up.

If you use a single document you can convert it to online ‘as is’ using most help authoring tools. You can also print it as is. For larger documents or document sets, where you need to use a separate document for each section, you may need some additional minor handling to pull the documents together in a set, for both paper and online outputs.

See *Producing outputs*.

Creating a new topic

Create new topics by creating a heading and adding some content.

Single document

If using a single document only, the structure of the document is as follows:

Title	Heading 1
Chapter/Process	Heading 2
Section	Heading 3
Subsections	Headings 4 and 5 (and possibly 6)

Multiple documents

If using multiple documents, each document is for a chapter only, eg:

Chapter/Process	Heading 1
Section	Heading 2
Subsections	Headings 3 and 4 (and possibly 5)

The level of depth to the heading hierarchy should ideally be no more than three for a section. Where the complexity of the content for a section threatens to drive you deeper, try to restructure the information into more sections.

See *Document structure (hierarchy of elements)* for more information.

Creating a numbered list

Numbering in Microsoft Word has been historically unreliable. Refer to Microsoft’s own News list dedicated to Word Bullets and Numbering for proof of the agony it can inflict.

This template does not use Word numbering. Headings are not numbered and numbered lists in procedures use Seq fields. This approach has proven to be robust and works with the conversion tools.

The electronic version of this Style Guide includes samples of these fields and may be copied (best to make autotext entries of them, and create a couple of toolbar buttons to trigger them).

For those users who don't have access to the electronic version, the Seq fields used are as follows:

For Step 1 of a procedure:

```
{ SEQ numstep \* Arabic \r 1 \* MERGEFORMAT }
```

For the remaining steps of a procedure:

```
{ SEQ numstep \* Arabic \n \* MERGEFORMAT }
```

Note:

The Seq field used for step 1, is different to the field used for subsequent steps. This is to make sure that the step sequence always starts with 1 when required. Be careful when copying the fields.

Note:

Refer to Microsoft Word's help for details of the Seq field. To see the contents of the field, type Alt-F9 (Display field codes).

The numbers...

1. Blah...
2. Blah...

Note:

Numbered steps are always set on NumList style, and are followed by a full stop and tab stop.

Creating a bulleted list

The template caters for bulleted lists to two levels, for example:

- Bulleted List
 - Bulleted List 2

Apply the Bulleted List style to each paragraph as required.

See *Using bulleted lists* for more information on using bulleted lists.

Creating a table

Tables are created via the Insert Table button on Microsoft Word's Standard toolbar. Tables can carry a border – but note that the WinHelp compiler can struggle with complex tables and borders. They should be aligned on the Body Text margin (for 'normal' width tables), or the Table Body margin (full-page width tables).

To create a table:

1. Click the Insert Table button and drag to select the number of rows and columns required.

The table is automatically positioned across the full width of the page.

2. For a normal width table with a border, drag the left border to align the left column to the Body Text margin.

For tables without borders, align the text in the left column of the table with the Body Text margin.

3. Create table content based on the following styles:

- Table Head – for the heading row
- Table Body – for cell content
- Table Bullet – for bulleted lists within tables

Inserting a graphic

Graphical content may be a system screenshot, flowchart or drawing. Graphics should initially be created and saved to file as bitmaps at 256 colours. Depending on what your document outputs are, you may want to convert the bitmap to JPEG or GIF format, link to it from a file or embed it in the document (see the *Table of graphics formats* below).

Screenshot graphics should be captured consistently from monitors of the same resolution, for example 800 x 600. Screenshot graphics captured at different resolutions *will look different*. See *Screenshots* in *Using graphics* for more details.

When scaling graphics, they should be scaled consistently throughout the document. This is particularly true for a mixture of full and partial screen images. A partial screen image should be scaled proportionately to a full screen image.

To insert a graphic:

1. Position the cursor on a new line set on Graphic style.
2. Choose Insert | Picture | From File and select the file to be inserted.
3. Click the Insert button (ensure that the Link To File option is checked).

The graphic is inserted as a linked file into the document. If the original graphic is modified this is automatically reflected in the document.

Table of graphics formats

When creating...	Note this...
HTML	Link to JPGs or GIFs. Any scaling of the graphics you do in Word is lost during conversion to online, so if you need to scale, scale the JPG or GIF before linking to it in Word.
Winhelp	Link to bitmaps. Any scaling of the graphics you do in Word will be lost during conversion to online, so if you need to scale, scale the bitmap before linking to it in Word. Note that you will lose quality by scaling a bitmap.
Paper only	Link to bitmaps. Scale them in Word as you require. If you are creating graphics in a vector drawing application such as Adobe Illustrator, export as WMF to preserve the vector character of the image when printing.
Both paper and HTML/Winhelp	Link to JPG or GIF (HTML) or bitmap (Winhelp). Any scaling of the graphics you do in Word will be lost during conversion to online. If you want graphics to be scaled for the online version consider creating two sets of graphics files with a simple name variation. You can search and replace the file name in Word after you have printed the paper version.

Notes:

The graphic is automatically resized to fit within the margins if it is larger than the margin width. To check the scaling percentages, right-click on the graphic, choose Format Picture from the context menu and select the Size tab.

If graphics are linked to the document as described above, this keeps the document smaller but means that the graphic file must be transported with the document when it is moved.

Creating a note (emphasised paragraph)

A style named 'Rule' exists for visually foregrounding a paragraph in a page of text. Such things as notes and important business rules are best emphasised in this way (see examples in this document).

To create a note (or emphasised paragraph) using the Rule style:

1. Type the note heading, for example the word 'Note' or a suitably worded heading.
2. Press Shift+Enter to manually break the line and reposition the cursor immediately below.
3. Type the text required.
4. Highlight the whole paragraph and apply the Rule style to add the borders.

5. Manually apply bold to the text of the heading only.

Creating an index

To create a document index:

- insert index entries in the document
- insert an index 'field' where you want the index to display

Note:

Most Word-to-online conversion tools convert index entries to an online index. The index field is redundant for online outputs.

For more information on the 'art' of indexing, see *Indexing*.

Inserting index entries

Index entries are hidden text elements that are compiled into a formal index at the index field. Index entries should be positioned adjacent to heading text, on the same heading style as the heading. There are two reasons for this:

- the index entry should point to the topic that the indexed information is contained in (this is because the index page number or hyperlink can only point to the topic)
- index entries are easier to find if they are inserted at headings rather than throughout the body of the text

To insert an index entry:

1. Position the cursor next to the topic heading to which the entry will relate.
2. Choose Insert | Index and Tables | Mark Entry and type the text of the entry.

You can enter a new main entry, or a sub entry for a new or existing main entry.

3. Click Mark.

Word inserts the index entry as hidden text next to the heading.

Note:

There is a limit to how many index entries can be placed alongside heading text. Exceeding the limit creates a problem in the Table of Contents entry for that heading. If you need to create more than ten index entries for a topic you may need to place some at the end of the first following paragraph.

Inserting an index field

The index field is where the compiled index for the paper document is displayed.

To insert an index field:

1. Position the cursor where you want the index to display, ie immediately below a heading 'Index'.
2. Choose Insert | Index and Tables and choose the index features you want.
3. Click OK.

The index field is inserted in the document and the index displays.

Updating the index:

You can update the index at any time by positioning your cursor in the index and pressing F9.

Creating a glossary term

A glossary is an alphabetical list of terms and acronyms with accompanying definitions. They should be brief.

The Glossary style within a Word source document is typically handled by conversion tools that generate an alpha-indexed list of the terms.

To create a glossary term:

1. Position the cursor where you want the new glossary term.
2. Set the style to Glossary and type the text of the term.
3. On a new paragraph, on Body Text style (and using any other styles as required), enter the information explaining the term.

Creating a cross-reference

Cross-references form an integral part of the information design of any larger document. Online, a cross-reference becomes a hyperlink. You should use cross-references intelligently to link to associated topics. Cross-references are a means to structure information in the preferred flatter structure of a maximum of three levels per main section.

Cross-references are created using Word's in-built cross-reference function.

To create a cross reference:

1. Position the cursor where you want the topic title to appear in the cross-reference.

Note:

See *Cross-referencing* in the section *Elements of style and formatting* for a discussion of wording of cross-references.

2. Choose Insert | Cross-reference.
3. Select Heading as the Reference Type.

The document headings will display in an outline of the document.

4. Navigate the outline to select the topic that you want to cross-reference and select it.
5. Click Insert to create a cross-reference using the text of the selected heading in the document.

See *Headings and sub-headings* for a discussion of optimal depth of structure for a document.

Pagination

Paginate your document (for paper output) when you have finished writing and editing it. Do not use manual page breaks to force content together. Use Word's paragraph attributes (Format | Paragraphs | Line and Page Breaks):

- use 'Keep with next' for heading styles to avoid lone headings at the bottom of a page
- use 'Page break before' to start a new page with a particular heading style
- make sure that 'Widow/Orphan control' is selected

Paginating in this way ensures that content stays together when new material is inserted (or deletions are made) at a later date.

Producing outputs

The HCl template provides, in the first instance, a layout for a paper document, including an allowance of white space for good readability. It is designed to allow ready conversion, with a minimum of handling, to the following online outputs (as produced by most help authoring tools):

- HTML
- Compressed HTML (HTML Help)
- WinHelp

Depending upon the requirements of your client for outputs from the HCl template, you may need to:

- only print a document based upon the template
- print it and also produce one of the online outputs
- produce an online version only

Each requirement requires a separate approach to using the HCl template.

Where both output forms are required, some handling to ‘translate’ the source file is required – basically these are to remove the white space, contents and index fields, which are redundant online. Additionally, more online information may be required to be specially inserted, such as the document control information which the template carries in the footer, which is also redundant online.

Paper-only

Use **HCl template.dot** as a basis for new documents and print as is. This creates a printable document with a small amount of white space, contents and an index. Note that you can alter the template’s style attributes, eg to increase the white space, change the font face and size, etc.

Paper and online

Determine the importance of the paper requirement. If it is significant, ie if more than a few members of the audience are relying on it, use **HCl template.dot** as a basis for new documents.

Once the paper version—which you should treat as the ‘master’—is final, you need to modify it for online use. For conversion of this duplicate file to online follow the steps in the next section.

Getting the paper document ready for online conversion

When the paper based document is complete:

1. Apply the online format version of the HCl template, **HCl online.dot** to reset the page margins for online use.

This aligns the text block flush left.

2. Save the document to a new filename.
3. Manually set the left border of the left column of all tables to the left page margin.
4. Remove the heading 'Contents' from the front of the document, along with the TOC.
5. Remove all section breaks, and the Index heading and contents from the end of the document.
6. If required, add in document control information, immediately under the document title, for example:
 - Date of issue
 - Version
 - Authorised by <name>

Converting the document to online

When the document is ready for online conversion:

1. Import the document.
2. Select the required output options.
3. Compile the document.

If you are using HTML Transit as the conversion tool, a 'style-mapping' exercise is required to adjust the look and feel.

Note:

Detailed instructions on how to convert Word documents to online format using help authoring and HTML conversion tools, such as RoboHelp and HTML Transit, are outside the scope of this document.

Online only

If you are only creating an online output, work from the template, **HCl online.dot** from the start.

List of template styles

The Word template **HCl template.dot** contains the following styles. These styles should be sufficient for most authoring tasks. You can create additional styles if required, but avoid manual formatting.

Style	Purpose
Heading 1	Title, for example 'System X User Procedures'
Heading 2	Section title, for example 'Administration Operations'
Heading 3	Subsection title, for example 'Using the system'
Heading 4	Sub-subsection title, for example 'Logging on'
Heading 5	Sub-sub-subsection title, for example 'Changing your password'
Heading 6, 7, 8, 9	Not in use
Subhead	For breaking up and labelling chunks of information without creating a new section. Note: When converting to online format, all sections created using Heading 2 to Heading 5 styles will be converted to separate online topics. Use Subhead style when you want to break up information <i>without</i> generating a new topic.
Body Text	The main paragraph style on which all text styles are based. The 'normal' style is not used nor are any styles based on it. This makes the template more portable since it will not be affected by the normal style on the target computer.
Bulleted List	First level bullet list
Bulleted List 2	Second level bullet list
Actor	For the 'actor' in a playscript procedure
Numlist	For numbered steps
Rule	For emphasising a note or tip
Table Head	For table heading text
Table Body	For table cell text
Table Bullet	For bulleted lists within table cells
Glossary	Used for the headings for glossary terms
Graphic	For placing graphics (screenshot images)
Header	For the header text
Footer	For the footer text

Style	Purpose
Index 1-2	Applied automatically
Page number	Applied automatically
TOC 1 – 9	Applied automatically
Logo	For title page graphics

Sample procedure

This procedure appears in the starter text of **HCl template.dot**, but is reproduced here to illustrate the format and layout of a procedure that includes screenshots.

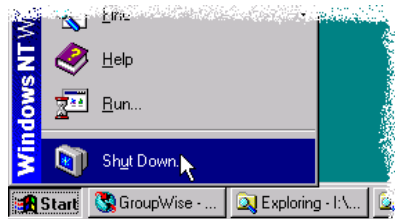
Shutting down the workstation

To shut down the workstation you must inform Windows NT that you want to do so. Please do not just switch off the power to the workstation.

To shut down the workstation:

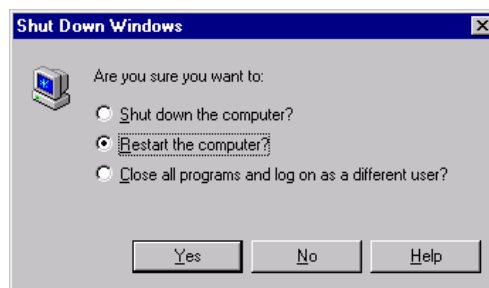
1. Click the Start button on the Windows NT taskbar.

The Shut Down option is shown here:



2. Release the mouse button while pointing to 'Shut Down'.

The Shut Down Windows dialog window displays:



3. Select the option that you want, by clicking the appropriate radio button.

The options are:

Shut down the computer?

This option is the only way to safely prepare the workstation to be switched off. Windows NT puts the workstation into a state in which it is safe to switch off the power.

Restart the computer?

This option performs all the shutdown functions, then immediately starts the computer up again. Use this option if you are experiencing serious problems in using the workstation, or if instructed to do so by a system support officer.

Close all programs and log in as a different user?

Use this option if another XYZ officer is about to take over and use the workstation. This is a much quicker option than shutting down the computer and restarting it. The option tells Windows NT and the network that you are no longer using the system, and that another user has logged on.

You may want to choose this option if you:

- are handing over the machine to someone else to work on
- have multiple logon IDs with different access levels for different role tasks
- want to logon as someone else

Note:

See *User logon IDs* for information about your user logon, multiple logons and system access rights.

4. Click Yes to complete the operation.

Glossary

Active voice

A clause construction in which the subject performs the action expressed in the verb - the subject acts. For example, 'Click the button'. Use active voice wherever possible. See also 'Passive voice'.

Assumed knowledge

Knowledge that the audience brings to a procedure or piece of information.

Case

A typographical term relating to the use of capitals (upper-case) and non-capitals (lower-case).

Cross-reference

A link (online) or pointer (paper) to another section, topic or document.

Emphasis

Use of typographical means (bold, italics, underline, case, etc) to distinguish text.

HAT

A third-party help authoring tool, such as RoboHelp.

Imperative

A verb form. Also known as command.

Online

Published to be viewed and used via electronic means.

Pagination

The occurrence of page breaks in a paper document.

Passive voice

A clause construction in which the subject receives the action expressed in the verb - the subject is acted upon. For example, 'the button should be clicked'. Avoid the use of passive voice. Use active voice wherever possible. See also 'Active voice'.

Plain English

Clear, concise and simple language.

Second person

Relationship to the grammatical subject of a sentence.

Style

That, in written expression, which is open to be addressed on terms of principle rather than unvarying conformity to rule.

Topic

A logical division within a body of information.

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