

Expert Support Inc.

Advanced Software Service, Documentation, & Training

Expert Support Style Guide

This style guide contains the writing and editing guidelines used by Expert Support for technical documentation. This guide also provides a framework for creating a client-specific style guides, when necessary.

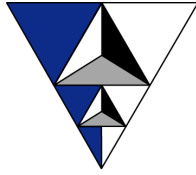
March 5, 2003

Revision Notes

Date	File	Changes
3/4/02 by MHN	all	Adjusted example, TOC, and index formats; applied consistent formats to all files; deleted superfluous colors and formats; adjusted colors; imported new logo.
9/23/02 by ELF	Title	<ul style="list-style-type: none"> ▼ Fix: Argh--style names in this file do not match those in chapters. This should be fixed someday. (e.g., Bulleted instead of Bullet1) ▼ Added this Revision Notes table.
	Overview	<ul style="list-style-type: none"> ▼ Typographical conventions says italic is used for emphasis; this used bold in "do not" so I fixed it. ▼ Added Audience section. ▼ Changed hard-coded company names to use existing variables; changed variables to "SampleCo" as the company name. ▼ Added list of additional standard sources for more info on style and vocabulary. ▼ Changed typographical conventions list to a table instead of text; added a NOTE to the list. ▼ Minor phrasing changes.
	General Ref	<ul style="list-style-type: none"> ▼ Page numbers in Overview table used chapter-page# format. Fixed. ▼ Minor edits throughout. ▼ Acronyms/Abbreviations: <ul style="list-style-type: none"> ❖ Added examples of abbreviations and acronyms. ❖ Added General Guidelines subhead for abbreviations/acronyms. ❖ Added conditional notes about where a customizer might add company-specific examples. ❖ Fix: The NoteText tag crowds the preceding paragraph. The Notegraf tag does not seem to allow text to be incorporated. Not sure how to use either of these appropriately. ❖ Added Note to acronym guidelines re online conversion. ❖ Added GIF and HTML to list of common acronyms that do not need to be spelled out. ❖ Added a Sample Capitalization Section subsection.
		<ul style="list-style-type: none"> ▼ Compound Words <ul style="list-style-type: none"> ❖ Changed heading to Hyphenation of Compound Words. ❖ Changed some Head2s. ❖ Replaced example "frame-to-mif converter" with "point-to-point protocol" because of capitalization issues; this might not be the ideal replacement.
		<ul style="list-style-type: none"> ▼ Index: Added a ton of guidelines and preferences. Needs winnowing and editing.
		<ul style="list-style-type: none"> ▼ Lists <ul style="list-style-type: none"> ❖ Capitalization: changed dog list from names to attributes, because names would already be capitalized. ❖ Somehow the examples in Numbered Lists had lost their numbers. Fixed. Also replaced example with better ones. Trust me. ❖ Added examples of nonparallel and parallel lists.

Date	File	Changes
9/23/02 (cont.)	General Ref (cont.)	<ul style="list-style-type: none"> ▼ Numbers <ul style="list-style-type: none"> ❖ Changed title to Numbers and Measurements. ❖ Added two new subsections, "Operators" and "Measurement Designations." ▼ Punctuation <ul style="list-style-type: none"> ❖ Added section on apostrophes. ❖ Added subheads for Dashes. ❖ Added info on how to create em and en dashes. ❖ Added examples and another bullet to Quotation Marks.
		<ul style="list-style-type: none"> ▼ General Notes <ul style="list-style-type: none"> ❖ Added explanation and expanded example for if vs. Whether. ❖ Replace active/passive example with several examples of each.
	Terminology	<ul style="list-style-type: none"> ▼ Terms to avoid, added: <ul style="list-style-type: none"> ❖ incentivize ❖ utilize ❖ via ▼ Split terms to avoid table into 2 tables and added intermediate text. ▼ Added subsections for Verbizing Nouns and Latin Terms. ▼ Added section on Localization. ▼ Added some terms.
	Client-Specific	<ul style="list-style-type: none"> ▼ Added list of possible topics.
	Formatting	<ul style="list-style-type: none"> ▼ Added new chapter This probably needs culling.





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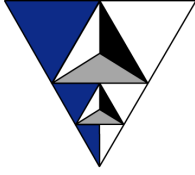
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Preface

Overview

This style guide contains a collection of writing and editing guidelines for producing consistent, good technical documents.

Section	Page
Audience	1
Organization of This Guide	2
Typographical Conventions	2
Related Documentation	3

Note: *The Style Guide uses a few special formats for style examples. Do not use the Style Guide as a template!*

Audience

This guide is for technical writers, marketing writers, engineers, and any other employees or contractors who develop documentation for our clients' products. Apart from the formatting information in Chapter 4, "Formatting and Context Guidelines," this guide does not assume knowledge of any particular document production system.

Organization of This Guide

This guide includes the following sections.

Chapter	Description
Chapter 1, “General Reference”	Information about <ul style="list-style-type: none">▼ Abbreviations and acronyms▼ Capitalization▼ Compound words▼ Index▼ Lists▼ Numbers▼ Personification▼ Punctuation▼ Additional grammar notes
Chapter 2, “Terminology”	An alphabetic listing of terms to ensure consistency
Chapter 3, “Client-Specific Conventions”	A chapter template wherein you can specify the conventions used in a particular document
Chapter 4, “Formatting and Context Guidelines”	Formatting conventions including <ul style="list-style-type: none">▼ Cross references▼ Chapters, sections, and introductions▼ User interface and technical elements▼ Tables and graphics

Typographical Conventions

This guide uses the following typographical conventions to help you locate and identify information:

Convention	Description and Use
<i>Italic text</i>	Used for emphasis and book titles.
Bold text	Identifies menu names, menu options, items you can click on the screen, and keyboard keys.
<code>Courier font</code>	Identifies commands you enter at the command line, file names, folder names, and text that either appears on the screen or that you are required to type in.
Note:	Provides extra information, tips, and hints.

Related Documentation

The *ESI Template* contains all files necessary to create FrameMaker documents in the approved ESI format.

This document is a summary of commonly encountered style issues. It covers formatting, grammatical, and vocabulary elements most likely to be encountered at ESI.

For additional or more detailed information, see the following:

▼ [<<Insert xrefs to any appropriate ESI style guide\(s\)>>](#)

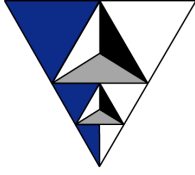
▼ *The Chicago Manual of Style*, 13th Edition, University of Chicago Press

▼ *Bugs in Writing*, Revised Edition, Lyn Dupré; Addison Wesley

▼ *Merriam Webster's Collegiate Dictionary*, 10th Edition

▼ *Microsoft Manual of Style for Technical Publications*, 2nd Edition; Microsoft Press

▼ *Microsoft Press Computer Dictionary*, 3rd Edition; Microsoft Press



CHAPTER 1

General Reference

Overview

This chapter contains information on the following topics.

Section	Page
Abbreviations and Acronyms	5
Capitalization	6
Hyphenation of Compound Words	7
Indexes	9
Lists	12
Numbers and Measurements	14
Personification	16
Punctuation	18
More Grammar Notes	20

Abbreviations and Acronyms

An abbreviation is a shortened form of a written word or phrase used in place of the whole. For example, temp., in., ht., and so on.

An acronym is a word formed from the initial letter(s) of each of the successive parts or major parts of a compound term. For example, ACE, SCSI, URL, and so on.

General Guidelines

Use the following guidelines:

- ▼ Use abbreviations or acronyms only when you are certain that they can be understood.
- ▼ At the first use of an abbreviation or acronym in a chapter, write out the term it represents and include the abbreviation or acronym in parentheses. For example, The table of contents (TOC) lists three levels of headings.
Before defining an Action/Classification Engine (ACE), verify that a similar ACE does not already exist.
- ▼ After defining an abbreviation or acronym, use it consistently (do not use the spelled-out term again).

Note: *Exception to the preceding rule: When a document will be converted to online and each section or chapter can be accessed independently by an end user, it is better to repeat the definition at the beginning of each major section.*

Some abbreviations and acronyms are very familiar, and do not need to be spelled out. Some examples are:

- ▼ ASCII
- ▼ CD-ROM
- ▼ CPU
- ▼ DOS
- ▼ GIF
- ▼ HTML
- ▼ OS/2
- ▼ RAM
- ▼ ROM
- ▼ SCSI

Capitalization

Apply the following capitalization guidelines for abbreviations and acronyms.

- ▼ Use lowercase letters for abbreviations, unless the term is a proper noun.
- ▼ Use uppercase letters for acronyms.

Indefinite Articles

If an abbreviation or acronym starts with a vowel sound, use the indefinite article (*a* or *an*) appropriate for that sound.

Example: an ASCII text file
a HUD loan
a WNL blurb
a URL (pronounced as three letters)
a SCSI device; an SGI device

Latin Abbreviations

The meanings of Latin abbreviations are not clear to many readers. Use the English terms, if possible.

Latin	English
e.g.,	for example
i.e.,	that is, in other words
etc.	and so forth, and so on

If you do use the Latin versions, follow the final period with a comma (see preceding table for example).

Capitalization

The following items listed are some of the areas for which capitalization decisions generally need to be made.

-
- ▼ Initial caps in chapter titles?
 - ▼ Initial caps in headings?
 - ▼ Initial caps in table titles, figure captions?
 - ▼ Index capitalization conventions

List commonly used words and their capitalization conventions in the appropriate letter section of Chapter 2, Terminology.

Sample Capitalization Section

This subsection is an example of what a company might include for capitalization rules.

- ▼ “Title caps” in chapter titles, headings, and figure and table titles when used
- ▼ Index: Capitalize only when the word itself is capitalized
- ▼ Nouns: Capitalize only proper nouns (that is, names of people, companies, or products).

Example: Ellen Finch
Policy Accelerator

Note: *Do not capitalize technical terms or references to items that are not trademarked product names.*

Example: dynamic-link library (DLL)
software developer’s kit (SDK)
accelerator module

Hyphenation of Compound Words

The hyphenation rules shown in this section cover most requirements for words commonly used in technical documents.

General Hyphenation Rules for Modifiers

- ▼ Use a hyphen when it is needed to clarify the meaning or syntactical connection of the words forming the compound.
Example: write-protected disk
user-defined function
computer-generated graphics
- ▼ If the hyphen does not aid readability, do not add it. For example:
wide area network
- ▼ Use a hyphen to join prepositional phrases used as adjectives. For example:
point-to-point protocol

- ▼ Hyphenate compounds used as adjectives. Note when they *do not* get hyphenated.

The girl is humor impaired. She is a humor-impaired girl. (Sad.)
 His whining was top notch. He was a top-notch whiner.

Other prefixes to look for in this category:
 all, cross, ex, half, high, low, quasi, self

- ▼ **Never** hyphenate the following types of compound modifiers:
 - ❖ *Adverbs ending in -ly*: locally run organization, highly developed species, environmentally friendly product
 - ❖ *Compounds with proper names*: South American countries, New Testament books
 - ❖ *Foreign phrases*: grand prix racing, post mortem examination

Nouns and Verbs

- ▼ Do not hyphenate a noun formed from two nouns if the compound has only one primary accent. Note the use in the following table.

Noun	Verb	Adjective
followup	follow up	followup
setup	set up	setup
backup	back up	backup

Example: They scheduled a followup. (noun)
 He was to follow up on the issue. (verb)
 He forgot to make the followup call. (adjective)

- ▼ Hyphenate a single letter/noun combination.

Example: B-tree
 L-bracket

Prefixes

Most compound words involving prefixes are not hyphenated.

Do not hyphenate compound words with any of the prefixes below unless the root is a proper name, a number, a compound word, an abbreviation or an acronym. (See exceptions listed below this list.)

ante	de	micro	pre	supra
anti	extra	mid	pro	trans
auto	infra	mini	pseudo	ultra
bi	inter	multi	re	un
bio	intra	non	semi	under
co	macro	over	sub	
counter	meta	post	super	

Exceptions to the preceding list are shown below.

Hyphenation	Explanation
non-Volvo	Root is a proper name
mid-thirties	Root is a number
un-ionized	Homonym is unionized
re-create	Homonym is recreate
co-op	Homonym is coop
non-Hungarian-speaking	Root is compound word
non-ESI	Root is abbreviation

▼ Use a hyphen to prevent doubling a vowel or tripling a consonant. For example:

anti-inflation	de-escalate
co-editor	pre-edit
co-worker	pre-engineered

See also the appropriate letter section for the term in question in Chapter 2.

Indexes

Size of Index

Typically, there should be one page of index entries for every 15 to 20 pages in the book, assuming that the index is two columns, the text in the index is 1 or 2 points smaller than body text, and run-in style.

Indexing Process Notes

It can be helpful to construct a list of terms before even starting the indexing (if you have the time).

It can also be helpful to mark up a hardcopy of the document with what you intend to index (if you have the time, although sometimes this can save you time in the long run).

Choice of Index Entries

Make logical choices based on content of the material and usefulness to the reader based on his level of experience and expertise with the product or related technology.

Categories of entries:

- ▼ Product terminology (e.g., Foo class); very experienced product users use these more often
- ▼ Commonly used industry terminology
- ▼ Plain English terminology; inexperienced and less-technical users use these more often

What to index: names of functions, classes, elements, concepts, initial words that are English terms or industry standard terms that we do not use—for example, *datagram*, *frames*, *packets*, *buffers*. For reference types of things (like functions), index both the location of the function definition and the location of any other explanation of how the function is used. For example:

getList method
 syntax, 48
 using in an application, 109

Note: *The preceding example is simplistic. If there are really only two references to getList, you might need only the entry getList 48,109. If there are several references, the main entry often has the page number(s) of the primary reference(s) or definition, such as*

getList method, 48
 code examples, 67, 115
 syntax, 66
 using in an application, 109

Main and Secondary Entries

- ▼ Main entries are generally plural nouns. Exceptions to this include
 - ❖ Proper nouns, such as UNIX
 - ❖ Collectives, such as e-mail
 - ❖ Items which are always singular in the context you are writing about, such as mainframe

In general, stick to nouns for the first level (e.g., ACE, packets, operating system) and list more specific nouns or verbs (“-ing” form) at the second level. For example:

channels
 configuring, 28
 data in, 15
 subcode for, 80

pins
 connecting, 22
 descriptions, 20
 diagram of pinouts, 165

- ▼ Second level entries have two basic variations: subcategory of primary entry (e.g., **packets:headers**), or grammatical phrase including primary entry (e.g., **packets:transmitting**; **packets:determining type of**). [Note: We do not always include the final connector words like “of” in these cases; hence, **packets:determining type**.]

Levels of Entries

A two-level index is easy to read and usually covers enough information for general use. Specify up to three levels of entry if you absolutely must. Our templates do not support more than three levels and additional levels are harder to create and maintain.

- ▼ If there are more than four or five page numbers associated with a primary entry, split it into subentries.

-
- ▼ If there are many subentries for one main entry with single pages, it is sometimes easier for the reader if you can find a way to combine subentries. This is a judgment thing.

See and See Also Cross-references

If you have two or more synonyms for the same concept, put all of your page number entries under your document's preferred terminology choice and use see entries for the synonyms. For example, instead of having entries both under *packets* and under *datagrams*, pick the preferred term for the actual page numbers and do a *see* for the other. Hence, it might be

packets, 7, 14, 21
datagrams, *see* packets (an industry standard term that you are not using)
information in a network, *see* packets (an English phrase for the concept)

When a term has been indexed as a subentry under a different primary entry, also use *see*.

Use *see also* when there is at least one page number for the current entry. Use only *see* when the current entry is solely a cross-reference. For example:

cats
eating habits, *see* finicky
sleeping, *see* televisions
dogs
see also canines, mammals
eating habits, 3
sleeping, 27

Here are some *see* and *see also* guidelines:

- ▼ *See* and *see also* entries should use the *exact* phrasing of the reference; e.g., *see also* packets, determining type of
- ▼ The client should specify their preferences for these entries, including
 - ❖ The use of capitalization and italics (*see* vs. *see* vs. *See* vs. *See*). In general, use italic and lower case.
 - ❖ Where these entries appear in the index. In general, place the *see also* entries at the beginning of the subentry list so the reader notices them right away. For *see* entries, try to make them part of the main entry:
Use this format: dogs, *see* canines
Not this format: dogs,
see canines

Formatting

This section provides formatting guidelines for those who are using tools other than our standard templates, and to ensure that our standard templates meets these formatting guidelines.

Capitalization Conventions

Do not capitalize the first letter of an index entry unless the term is normally capitalized, for example, if it is a proper noun. However, some clients prefer entries to use initial caps.

Page Reference Formats

Rules for page numbers in index entries:

- ▼ Use the same text style as the entry itself (do not use bold or italic)
- ▼ Separate lists of page numbers with commas
- ▼ Indicate a range of page numbers with an en dash (–) (we do not usually use page ranges for our ESI documents)
- ▼ If the page numbers in the book use the chapter-page format, such as 2-1, 2-2, etc., us the word “to” instead of the en dash for ranges.

Lists

Use lists to organize information so readers can grasp concepts and relationships quickly and perform tasks easily.

Always try to introduce lists with a complete sentence.

Capitalization

Capitalize the first letter of each item in a list.

Example: Dogs have the following attributes:

- Legs
- Noses
- Endless energy

Bulleted Lists

Use bulleted lists to

- ▼ Itemize parallel elements in a sentence or paragraph
- ▼ Introduce, summarize, or provide an overview of information

If you use a bulleted list for summary or emphasis purposes, make sure the order in the list echoes the order in which the topics appear in the document.

Numbered Lists

Use numbered lists to indicate a hierarchy, order, or procedure. Follow these guidelines:

- ▼ Start each list with the number 1.
- ▼ For tasks a user is to perform, use a procedural list for added clarity.
 - ❖ Use the numbered line to list the task, preferably starting the sentence with a verb. For example:
 1. Create the main directory.
 - ❖ Each step should describe only one action, unless the actions are closely related (for example, 2. Make a selection and press Return).
 - ❖ The results of a step should not be formatted as a step, rather as a continuation. For example:

-
1. Create the main directory.
The directory structure appears as shown in the following figure.

Use this continuation area to provide more information about the task, as well.

Page Breaks in Lists

Apply the following guidelines to make the list more readable.

- ▼ Do not separate a list from the clause that introduces it.
- ▼ If you must split a list, make sure that the entire contents of the first and last items in the list appear on their respective pages.
- ▼ Always make sure that at least two items in the list appear on a given page (so avoid single bullet or number orphans).

Parallelism in Lists

Make all the items in the list grammatically parallel (same tense and sentence structure).

Example of nonparallel list:

- Supports many commands
- You can download subroutines
- Automated backup

Example of parallel list:

- Supports many commands
- Allows downloading of subroutines
- Automates backups

Punctuation in Lists

Apply the following guidelines for punctuating lists.

Punctuating the List's Introduction

- ▼ End the introduction to a list with a colon if it contains the phrase "as follows" or "the following." Use either a colon or period after an introductory sentence.

Example: Use one of the following options to pacify your boss:

1. Say, "Wow, that's brilliant."
2. Offer her cookies.

Example: Your next task is to write the book.

1. Get paper.
2. Get pen.

- ▼ If the introduction is a sentence fragment, or if the list is the object to a grammatical part of the introductory phrase, do not punctuate the introduction.

Example: This chapter explains how to

- Make a rubber chicken
- Annoy your neighbors

Punctuating List Items

- ▼ If the items in a list are complete sentences, end each with a period.

Example: Do one of the following:

- Press F7 to save the file to a location you specify.
- Select the Kill option to bypass the Save function.

- ▼ If the items are not complete sentences, do not use periods. See rubber chicken example above.
- ▼ Apply punctuation consistently for all items within a list, that is, if only one item needs a period, apply periods to all items.
- ▼ For consistency, revise the list so that the entries have parallel construction; then you are not violating these punctuation rules.

Numbers and Measurements

Rules for numbers are complex. Use these guidelines as a starting point.

Spelling Out Numbers

Spell out numbers in the following cases:

- ▼ Integers below 10. For example, one, two, three, etc.
- ▼ Numbers that begin a sentence. For example:
Thirty-one years ago, the world was a dark place.
- ▼ Ordinals. For example:
the sixth step
the third option
- ▼ Two numbers in succession. Spell out the first one. For example:
Fifty 9-inch nails
- ▼ Nondecimal fractions. For example:
One-half of the attendees laughed.

Using Numerals

Use numerals in the following cases:

- ▼ Integers above nine. For example, 10, 11, 69, etc.
- ▼ Round numbers greater than 999,999 are written as a combination. For example:
1 million
1.7 million
1,732,486
- ▼ All items in a series when at least one item is over nine. For example:
She had eaten 5 eclairs, 15 napoleons, and 2 bananas.
- ▼ Technical units and units of measure. For example:
12 MB

- ▼ Specific references to step, section, or page numbers.
- ▼ Decimals. Use 0 before the decimal. For example:
0.95

Punctuating Numbers

The rules for punctuating numbers are similar to that of text. The differences are covered here.

- ▼ When referring in text to numerals containing four or more digits, use a comma three digits from the right. For example:
2,000
200,000
This rule does not apply for computer chip numbers (68040).
- ▼ Hyphenate adjectival forms before nouns. For example:
3.5-inch diskette
100-pin package
100-MB disk (non-adjectival, so no hyphen: 100 MB of disk space)
- ▼ For number ranges, use the terms *to* or *through* in text; use an en dash in tables and figures.

Text	Tables/Figures
You will need 40 to 60 MB to run this software.	40–60 MB
Do Steps 1 through 4 to add your dog to the database.	Steps 1–4

Measurement Designations

Rules for measurements:

- ▼ Spell out first occurrence of an abbreviation; for example:
16 megabytes (MB)
- ▼ Avoid K and M; too general
- ▼ Use a space between number and abbreviation:
16 MB (note that 16M is an exception)

Preferred abbreviations:

- ▼ MB (megabytes)
- ▼ MB/sec.
- ▼ Mbit (megabits)
- ▼ Mbps (megabits per second)
- ▼ KB (kilobytes)
- ▼ GB (gigabytes)
- ▼ TB (terabytes)
- ▼ PB (petabytes)
- ▼ MIPS (million instructions per second)

- ▼ MHz (megahertz)

Temperatures are formatted with the following three parts:

- ▼ Temperature as a number
- ▼ No space followed by the degree mark °
- ▼ Thin space (**esc space t** in Frame) followed by either C or F, or no space if thin space is not an option in the program
For example: 52°F

Operators

The rules for operators are similar to the rules for numbers.

- ▼ Spell out operators in sentences. For example:
is greater than, is equal to, subtracted from
- ▼ Use the Symbol font operators in equations.

Personification

Use verbs that describe machine processes in nonhuman terms.

This section contains lists of human-oriented terms and some possible inanimate replacements.

Human	Inanimate		
Sight and Perception			
check to see	consider	perceive	verify
look	discern	recognize	view
notice	distinguish	regard	
observe	examine	search, search for	
see	locate	seek	
watch/watch for	monitor	validate	
Cognition			
to be aware of	accept	manipulate	
believe	argue	reason	
catch	choose	recognize	
consider	compare	regard	
decide	confirm	reject	
deliberate	contrast	retain	
intend	decide	select	
judge	design	store	

Human	Inanimate		
know	determine	weigh	
realize	equate		
remember	evaluate		
think	examine		
understand	interpret		
Communication			
ask	acknowledge	inform	report
request	announce	instruct	respond
say	cite	introduce	route
tell	communicate	offer	show
confirm	contend	point to	signal
	deny	print	state
	display	prompt	specify
	indicate	reply	
Want/Need			
desire	(to be) compelled	require	
expect	lack	wait for	
favor	must		
intend	need		
prefer			
want			
wish			

Punctuation

This section describes the use of punctuation to promote ease of reading and to prevent misreading.

Apostrophes

An apostrophe (') indicates either a possessive noun or a contraction. The following list shows some places *not* to use apostrophes.

- ▼ Do not use contractions in technical publications. (Compare to: Don't use contractions—)
- ▼ Plurals of acronyms or abbreviations do not use an apostrophe. For example: LANs, URLs, DVDs, TVs
- ▼ Plurals of nouns do not use an apostrophe unless the plural noun is also possessive. For example (this is tricky, now; pay attention):
Incorrect: We have three customer's named Joe, Sam, and Margie.
Correct: The customers were irate; one customer's site had vanished; the other customers' sites could vanish at any moment.

Colons

Colons indicate that the information after the colon deserves special attention.

See also "Punctuation in Lists" on page 13.

- ▼ Do not use a colon to separate a verb from its object. For example:
Incorrect: The cats that must be neutered are: Hojo and Clam.
Correct: The cats that must be neutered are Hojo and Clam.
- ▼ Do not use a colon to separate a preposition from a phrase or to break up an infinitive when introducing a list. For example:
Incorrect: Create scripts for:
 - Users
 - Groups
Correct: Create scripts for
 - Users
 - Groups
- ▼ Put colons outside of quotation marks unless they are part of the quoted material. See also "Quotation Marks" on page 20.

Commas

These are some of the more commonly used conventions for the use of commas.

- ▼ Use serial commas.
They had ice cream, chocolate, and lasagna.
- ▼ Put commas inside of quotation marks.
See "Quotation Marks" on page 20 for additional info.

- ▼ Use commas to set off nonrestrictive clauses, using *which*. You can remove a nonrestrictive clause from the sentence without changing the meaning. For example:

Example: The aardvark, which I had named Albert, walked over to me awkwardly.

- ▼ Do not use commas to set off restrictive clauses; use *that* (and **not** *which*). Removing a restrictive clause from a clause changes the meaning of the sentence. For example:

Example: The aardvark that is in my kitchen is named Al. (The one in the living room has not introduced himself yet.)

- ▼ Do not use a comma before a conjunctive adverb joining two parts of a sentence; rather, use a semicolon. The following table lists some commonly used conjunctive adverbs.

accordingly	hence	then
also	however	therefore
besides	moreover	thus
consequently	nevertheless	too
further	occasionally	
furthermore	otherwise	

- ▼ For example:

Incorrect: Choose the X menu, then press Return.

Correct: Choose the X menu; then press Return.

Dashes

Em Dash/En Dash

Use an em dash (—) to set off explanatory or digressive elements. For example—if you need an example—this sentence uses em dashes correctly. Do not use spaces around the dash.

Use an en dash (–) to set off ranges (do not use spaces around the dash), and as a minus sign (if not using the equation editor).

To create an em dash or an en dash

	Microsoft Word (Windows)	FrameMaker (Windows)
em dash	ALT+CTL+numeric -	CTL+q+SHIFT+q
en dash	CTL+numeric -	CTL+q+SHIFT+p

In Word, you can also insert a variety of dashes through the Insert > Symbol menu.

Hyphenation

For information on hyphenation, see “Hyphenation of Compound Words” on page 7 and the appropriate letter section for the term in question in Chapter 2, Terminology.

Quotation Marks

The term quotation marks refers to “ ”. These are sometimes called “double quotation marks.”

- ▼ Use quotation marks with chapter titles, sections, and headings referenced in text.

Example: See “Wallabies and Wombats” for a detailed description.

- ▼ Do not use for titles of documents; instead, italicize.

Example: See *The Chicago Manual of Style*.

- ▼ Place colons and semicolons outside of quotation marks unless they are part of the quoted material.

Example: The following agenda items came from Joe's comment to “get organized”:

- ▼ Place commas and periods inside of quotation marks. For example:

Example: “This,” “is”: “an example.”

However, if you are putting commands that the user needs to type in quotation marks, and a comma or period is necessary immediately after the command to be entered, do *not* place it within the quotation marks; the placement could confuse the reader and lead them to believe the punctuation is part of the command.

Note: *Single quotation marks are used ONLY for quotations within quotations.*

Example: She said, “No, I didn't say ‘I owe you money.’ I said, ‘I own a monkey.’ Maybe you need a Sprint PCS phone.”

Semicolons

- ▼ Semicolons join two closely related ideas. Both parts of the sentence on either side of the semicolon must be complete sentences.

- ▼ Use semicolons in a complex list within a sentence that also includes commas.

Example: He has translucent, white skin; tangled, dyed black hair; and piercing brown eyes.

More Grammar Notes

This section addresses common grammar questions.

That vs. Which

- ▼ *Which* sets off nonrestrictive clauses, that is, clauses you can remove from the sentence without changing the meaning.

Example: The aardvark, which I had named Albert, walked over to me awkwardly.

- ▼ *That* is used to set off restrictive clauses, that is, clauses you cannot remove from the sentence without change the meaning.

Example: The aardvark that is in my kitchen is named Al.

As a general rule of thumb, if the term *that* would require a comma to precede it, use *which*.

If vs. Whether

Use *if* when there is a corresponding *then* part of the sentence (even when the *then* is only implied). Use *whether* when there is no corresponding *then*. (Note that *whether or not* is often redundant; use this phrase only to mean *regardless of whether*.)

Example: He wanted to know whether I was Martian, because if I was, [then] he wanted a photograph. Whether or not I was Martian, he thought that I had an attractive protocol.

Since vs. Because

Since refers to time, whereas because does not. For example:

Incorrect: I went to the store since I didn't have any kumquats.

Correct: I went to the store because I didn't have any kumquats.

Correct: I have been eating jellied eels since 1971.

Like vs. Such As

Do not use *like* in place of *such as*. Like means resembling. For example:

Example: She walks like a duck (that is, she walks as a duck waddles).
Large mammals, such as elephants, need lots of space.

Active vs. Passive Voice

Use active voice whenever possible. To change passive to active, ask *who* performed the action.

Passive

Example: When an application bar is clicked... (*Who clicks it?*)
Additional classification rules will be added. (*By whom?*)
By holding down Ctrl-C, the system can be rebooted. (*Who holds down the key? and/or Who reboots the system?*)
By setting the XYZ register, the ABC signal is sent. (*Who sets the register? Who sends the signal—and where?*)
The checksum is transmitted to the next device. (*Who transmits it?*)

Active

Example: Click the application bar to...
You can add additional classification rules...
By holding down Ctrl-C, you can reboot the system. (Or, better: To reboot the system, hold down Ctrl-C.)
When the firmware sets the XYZ register, the NM666 sends the ABC signal to the microprocessor.
The fribulator transmits the checksum to the next device.

I vs. We

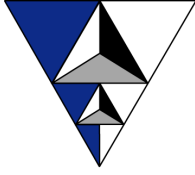
Use *I* to refer to your own actions or beliefs.

Use *we* to refer to ESI, to a client, or to something involving the reader (except as noted below).

Use *you* to refer to an action the reader should take, or to refer to the reader directly.

Note: *Clients often prefer to avoid personal pronouns. In this case, substitute more generic or neutral terms. For example, use the company name instead of “we” and “the user” or “customers” instead of “you.” For consistency, avoid first person “I” as there is no generic substitute.*

***Always** be consistent and stick to one format rather than switching between the use of personal pronouns and neutral terms. For example, if you start out by referring to the reader as “you,” do not switch to “the user” a few paragraphs later.*



Terminology

Overview

This chapter lists commonly used terms, some of which are often incorrectly used or spelled. The items in this chapter are provided as a starting point. Use this chapter to add other client-specific entries, as needed.

Section	Page
Words and Phrases To Avoid	23
Localization	24
Alphabetical Listing of Terms	26

Words and Phrases To Avoid

These terms are often used by clients; sometimes you will have no choice but to use the offending language. However, this section also lists alternatives for conveying the same information.

To Avoid	Options
iconize iconify	Make into an icon
incentivize	motivate; provide incentive
to <i>mouse</i> anything	Use the <i>x</i> mouse button to ...
genericize genericization	Make generic
hypothesize	Form a hypothesis
computerize	Make computer based
impacted, as in “has an effect on”	
▼ error bottlenecking	▼ Handle errors in a single location
▼ bottleneckable error	▼ Errors that can be handled in a single location in the code
▼ error bottleneckization	▼ ...get a valium...
upgrading (as a noun)	update
signedness (meaning what??)	

To Avoid	Options
sendable	
to message	
merchantability	
utilize	use
via	by using through

As technology changes, some terms that were considered to be non-English gradually become accepted. The following table lists some that are on the edge of acceptance.

Borderline	Options
encodings (awkward, but it is becoming very common as in “character encodings”)	
portability	
thunked	
overridable	Can be overridden You can override this
readability	
deselect	
double-clicked (as in the button was double-clicked)	

Verbizing Nouns

When you are tempted to use a word ending in “-ize,” the odds are good that you are creating a word where an equally effective word already exists. Some examples are given in the preceding tables. (And yes, the heading of this section is intended to be a joke.)

Latin Terms

Avoid Latin terms, whether abbreviations or whole words.

See *per* and *via* in the preceding table and “Latin Abbreviations” on page 6. <<Note: “per” is not in the previous table. Add examples for this.>>

Localization

We hope that our product will become much in demand and be translated into a variety of languages. In all languages, including English, we want our product to be easily and quickly understood.

Ambiguous Terms

For these reasons (and others), it is important to use terminology that is consistent and unambiguous.

Here are some commonly used overloaded or ambiguous terms and their alternatives:

Ambiguous or Overloaded Term	Meanings	Correct Example	Incorrect Example
once	a single time	Do this step only once.	
	after	Do this step after you have booted the system	Do this step once you have booted the system.
kind	sympathetic	You are kind and generous.	
	variety/category	There are three varieties of widgets. There are three categories of widgets.	There are three kinds of widgets.
	in a way or similar to (kind of)	This is similar to rebooting.	This is kind of like rebooting.
type	press the keyboard	Enter your name and press Return.	
	variety/category	There are three varieties of widgets. There are three categories of widgets.	There are three types of widgets.
	programming language element	There are two variable types: Integer and Real.	
may	has the ability to	The command can use any existing files.	The command may use any existing files.
	has permission to	Yes, you may leave the table now.	Yes, you can leave the table now.
	might or perhaps	The command might use any existing files [in the following situations].	The command may use any existing files.
right	correct	Select the correct header.	Select the right header.
	immediate (right away, right after)	The next packet arrives immediately after the header. The next packet arrives immediately.	The next packet arrives right after the header. The next packet arrives right away.
	opposite of left	Select the left or the right channel. Read the dial on the right.	Read the right dial.

Colloquial Terms and Phrases

Phrases that Americans use for commonly recognized American activities, culture, and so on, especially metaphorical meanings, are often difficult to translate. Avoid phrases similar to the following:

Don't get left behind the curve.

State of the art

If you choose to use colloquial expressions, such as the following, ensure that they are clearly explained in the glossary for future translation:

Make your application scream.

Then, in the Glossary:

In the context of "make your applications scream," meaning to make your applications operate extremely fast. Use only in marketing literature, not in technical documents.

Alphabetical Listing of Terms

Conventions Used in This Section

The following conventions are used in this section:

- ▼ Capitalization is significant
- ▼ The term `<word>` denotes a variable. Entries in this form are used to indicate the absence or presence of a hyphen, or specific ways of handling certain terms. For example:

Example: `<word>like`

This indicates that a compound word containing the "like" suffix is not hyphenated, as in *childlike*, *Windowslike*, and so on.

This notation can also denote capitalization (`<Word>` vs. `<word>`), which may be useful for certain client-specific applications.

Terms

The terms listed below show standard formatting, hyphenation (or lack of hyphenation), capitalization, and plural formats. Exceptions to these rules are shown in "[Hyphenation of Compound Words](#)" and "[Capitalization](#)" in , Chapter 1, "General Reference."

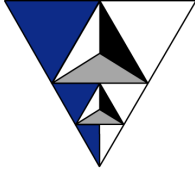
-
- A** anti<word>
 auto<word>
- B** bitwise
 <word>-based
 Boolean
- C** callback (as in callback function)
 cannot
 CD-ROM (plural: CD-ROMs)
 co<word>
 co-edit
 <word>-compatible
 cross-<word>
 custom-<word>
- D** database
 datatype
 dereferencing
 <word>-driven
- E** <word>-end
 endian
 Ethernet
 extra<word>
- F** far pointer
 fax
 fiber-optic network
 Fibre Channel
 field name (2 words)
 filename (1 word)
- I** identifier

	inter<word>
	initialize
	initialization
	Internet
	intra<word>
J	JPEG
L	laptop
	<word>like
M	menu bar
	modem
	multibyte
	multiclient
	multi<word>
	<word>most
N	near pointer
	nonpreemptive
	non<word>
O	offline (but many clients prefer off-line)
	online (but many clients prefer on-line)
P	post<word>
	postfilter
	pre<word>
	prefilter
R	re<word>
	re-entrant
S	scalar

single-byte
single-client
single-*<word>*
status bar
sub*<word>*
subsystem

T tool bar

W World Wide Web (WWW)



Client-Specific Conventions

Overview

This chapter is provided as a template for other project-specific needs that are not covered in the first two chapters.

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Copyrights and Trademarks	31

Some topics to consider include

- ▼ Copyright notices
- ▼ Trademark notices
- ▼ Third-party trademark notices
- ▼ Notation for trademarks and copyrights
- ▼ License agreements
- ▼ Confidential notation
- ▼ List of trademarks and registered trademarks
- ▼ Logo usage
- ▼ Standard illustrations

Copyrights and Trademarks

Most documentation intended for external use (that is, for use outside of the company that produced the document) requires a copyright and trademark notice. Each client should have guidelines for the placement of this block, and for what items are included in it. Information frequently listed in this block includes the following:

- ▼ A list of trademarked names and branded items claimed by the client and by its partners
- ▼ Restrictions on the use of the product or materials described in the document
- ▼ Restrictions on the copying and distribution of the document
- ▼ A legal statement of liability limitation on claims made in the document

In general, this notice is placed at the front of a document after the title, or at the end of the document on or before the last page.

Here is a sample copyright and trademark notice from Sun Microsystems:

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Third-Party Trademarks

Each client has their own rules.

- ▼ For most companies, only the trademarks and brands they own are listed in their notice.
- ▼ Some include trademarks and brands owned by their partners as well. Generally these are partners with whom they have agreements stating that they will acknowledge their products.
- ▼ Some documents simply make a general statement that all trademarks mentioned in the document are the property of their respective owners and do not take the time to itemize them.

Notation for Trademarks and Brands

Some basic varieties of marks include the following:

- ▼ Trademarks are marked with the TM symbol . This mark is generally applied to products.
- ▼ Registered trademarks are designated by the ® symbol. This also designated products, usually with a wider legal registration for use in multiple locales or different markets.

-
- ▼ Service marks are designated by the SM symbol. This mark is generally used for services or programs.

What is actually marked in a document varies from client to client.

- ▼ Some clients do not include these symbols in their documents.
- ▼ Others mark selectively, such as the first occurrence of the trademark name in the document, or prominent usage.
- ▼ Some clients mark every instance of the trademark in a document.

Rules for Usage—Trademarks as Adjectives

All trademarked items are considered adjectives, and as such, should always be followed by an appropriate noun. Not all clients are concerned with this rule, but it is a factor to consider when planning a document. Here are some examples:

Example:

Incorrect: Java is used by programmers around the world

Correct: The Java programming language is used by programmers around the world.

Incorrect: She keeps her shampoo in a Ziploc when she travels.

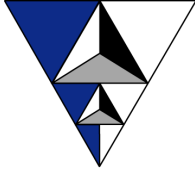
Correct: She keeps her shampoo in a Ziploc bag when she travels.

Rules for Usage—Abbreviations

In general, it is acceptable to abbreviate a trademark after it is written out in the first occurrence in a document.

Example: The Java Dynamic Management Kit (JDK) is installed on that system. To start the JDK, click the **Start** button in the dialog box.

Some trademarks have specific rules and cannot be abbreviated. Contact your company's legal or trademark department for specific information.



Formatting and Context Guidelines

Typically, the FrameMaker or Word template used by technical writers addresses many of the issues discussed in this chapter. However, not everything can be handled automatically, and for those working on documents or in departments where there is no standard template available, it is helpful to have this information available. This chapter provides some general guidelines and rules for formatting.

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ESI FrameMaker Template

The *ESI FrameMaker Template* contains all files necessary to create FrameMaker documents in the approved ESI format.

This template includes a summary of commonly encountered style issues. It provides examples for the topics discussed in this chapter, such as how to format lists, headings, paragraphs, and so on.

Note: *The material in this chapter can be applied to any documents whether or not FrameMaker is used.*

Book Construction

A product manual consists of the following (see the ESI FrameMaker template for details):

- ▼ Title page
- ▼ Copyright page on back of title page (pages unnumbered)
- ▼ Table of Contents (numbered in lowercase Roman numerals starting at i)

- ▼ About this Book (continue numbering in Roman numerals)
- ▼ Chapter files (numbered in Arabic numbers starting at 1)
- ▼ Appendixes optional (continue numbering)
- ▼ Index optional (continue numbering)
- ▼ Back page with license agreement (license agreement not required for hardware-only documents)

Cross References

When cross referencing another document, section, or element, use the following formats.

Element	Sample format
Document titles	<i>ESI Programmer's Reference</i>
Chapters and appendixes	Appendix A, "ESI Template—Sample Appendix." Chapter 5, "ESI API" on page 25 Appendix A, "ESI Template—Sample Appendix," Chapter 5, "ESI API."
Lower-level headings (sections within chapters)	"Your First ESI Application" "Your First ESI Application" on page 21 "Your First ESI Application," "Your First ESI Application."
Heading without quotes; use rarely, primarily for text that will be converted only to HTML, not hardcopy, and the quotation marks would look out of place.	Your First ESI Application
Page	...on page 21
Step	...in Step 3
Tables	...the following table... ...the preceding table... ...the table on page 21...
Figures	...the following figure... ...the preceding figure... ...the figure on page 21...

Chapters, Sections, and Introductions

Generally, every logical chunk of a document should be introduced so the reader knows what is coming up, why it is of interest, and what the context is. Examples are shown in the following table.

Chunk	Examples of introductory material
Chapter	This chapter describes _____, explains how to _____, and lists _____. It contains the following topics: ▼ “First Section,” which describes _____ ▼ “Second Section,” which explains _____
Tables and figures	The following table lists _____ The following figure shows _____
Headings lower than chapters	[at least one line of text before next lower header level, table, figure, etc.]
Subheadings	[at least 2 of a given level of heading under a single higher level, otherwise why have a subheading? for example: HeadingLevel1 HeadingLevel2 HeadingLevel2 HeadingLevel1

User Interface and Technical Elements

To ensure consistency among documents, use the following type styles and formats for user interface and technical elements in text.

Element	Format
Filenames	When using a specific name, capitalize as on the system; for example, foo.dll. When referring to files in generalized terms, use consistent English terms if possible. For example: Good: Move the library files to.... Good: Move the DLL files to.... Not as good: Move the .dll files to... Even worse: Move the *.dll files to... If you must be specific, perhaps an example would be better: <code>mv *.dll foo\....</code>
Keyboard keys	Capitalize the key name and <i>press</i> it. For example: Press Enter. If the key name is an abbreviation, use all uppercase, as in ESC, ALT, CTRL, or DEL. We do not really have a convention for key sequences. For simultaneous keys, we could use: Press CTRL+ALT+DEL For sequential keys, we could use: Press CTRL, W, P

Element	Format
Menus, submenus, and menu commands	<p>Examples:</p> <p>Select Open from the File menu. [or]</p> <p>From the File menu, select Open.</p> <p>There are several commands on the File menu. If the Open command is unavailable, select New.</p> <p>The File menu includes several submenus, including Import and Utilities.</p> <p>From the File menu select Import > Formats.</p> <p>Do not include ellipses on submenu names (e.g., do not write Import...).</p> <p><u><<Note: We need a standard way of designating multiply nested menu commands, such as Menu:Submenu:Subsubmenu:Command? MS style guide does not address this.>></u></p>
Typing	<p><i>Enter</i> a command or value on a command line, not <i>type</i> it.</p> <p>But <i>type</i> it into a text box in a dialog box.</p>
Buttons	<p><i>Click</i> a button (not press it).</p> <p>For example:</p> <p>Click Save.</p> <p>(Expand to Click the Save button only when needed to clarify an ambiguous situation.)</p>
Dialog boxes and components	<p>A dialog box usually has a title; hence: "the Marker dialog box appears."</p> <p>Dialog boxes can contain the following elements:</p> <ul style="list-style-type: none"> ▼ Text boxes (in which you type text) ▼ Drop-down lists (from which you select a value) ▼ Option buttons (usually round; you can select only one and the others then automatically deselect) ▼ Check boxes (which you select or clear) ▼ Scroll bars
C-language elements and examples	<p>Use monospaced font, such as Courier.</p>
Directories	<p>Use monospaced font, such as Courier. Use backslash (\) to designate levels of directories (e.g., <code>include\nbapi.h</code>).</p>

Tables

This section describes several formatting standards for tables.

Alignment of Tables

Left-align tables under the level of text with which they are associated. For example:

Table 1. Table Under Standard Body Text

For lists:

▼ Here is a bullet

Table 2. Table Under A Bullet

Table Titles

Use titles only when needed to make the table clearer.

Table Cell Parallelism

Entries in columns of table cells (and across column headings) generally should use parallel grammatical construction. For example:

Good:

Requirement	Description	Description (OK alternate)
Windows NT	Install the latest version available from Microsoft.	Latest version
Disk space	Ensure that at least 28 megabytes is available on your system disk.	28 megabytes
Memory	Use the xxx command to verify that you have at least 99 megabytes of memory available.	99 megabytes

Bad:

Requirement	Description
Use Microsoft Windows NT release 27 with distributor pack 3.	
Plenty of Disk space	Ensure that at least 28 megabytes is available on your system disk.
Memory	99 megabytes

Unlined Tables

Use unlined tables generally only to format a list into columns. For example:

Example: Some commonly used conjunctive adverbs are listed below.

accordingly	hence	then
also	however	therefore
besides	moreover	thus
consequently	nevertheless	too
further	occasionally	
furthermore	otherwise	

Graphics

To insert a graphic:

1. Create an Anchor paragraph.
2. Insert an anchored frame in that blank Anchor paragraph line, using the setting Below Current Line and a width of 5.25 inches for graphics that fit within the body text column.
3. Place the graphic within the anchored frame 0.0 inches from the top and 0.0 inches from the left.

You can do this after creating the complete graphic by selecting all inside the frame, grouping them, then adjusting the Object Properties of the grouped object.

4. Adjust the bottom of the anchored frame so it is approximately 0.125 inches from the bottom of the graphic.
5. Left-align figures under the level of text with which they are associated, as with tables. (Select all in frame, group, and use Object Properties to set:
 - ❖ Offset from Left to 0 for standard body text, 0.2 for beneath bullets or numbers, etc.)
 - ❖ Offset from Top to 0

Sample Graphic Under Bullet2
Note it is aligned under the Bullet2
text; text and graphic elements are all
part of the graphic so leftmost part
is left-aligned.



6. If you want a caption, use Figure tags *after* the figure.

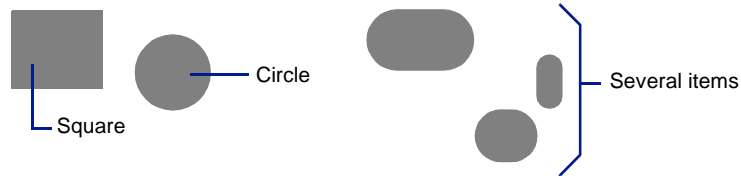
Callouts

Callouts in a graphic have two components:

- ▼ Text, which should use the Callout character tag. Apply Bold as needed.
- ▼ Line indicating which element in the graphic that the callout refers to (optional). The line, if used, should:
 - ❖ Have 1-pt. line width (narrower looks nicer in hardcopy but vanishes online)

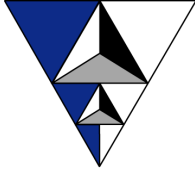
-
- ❖ Use the Highlight color
 - ❖ Approach side of callout on a straight horizontal line
 - ❖ Use only right angles if possible (except brackets for groups of things, where a 45-degree angle is OK)

Example:



Screen Captures

- ▼ When using SnagIt (downloadable application) to do screen captures, save the files as TIF files using LZW RGB compression. This minimizes the file sizes.
- ▼ You can do a quick and dirty screen capture without SnagIt by pressing the **PrntScn** button and then pasting into a Word or a FrameMaker document. However:
 - ❖ Whichever tool you use for screen captures, try to make the screen you are capturing the actual size that you want it *before* you capture it, so you do not have to scale it at all in FrameMaker.
 - ❖ Always import these files by reference; do not include them in the file.



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