Style Guide

This document houses notes, questions, and suggestions to be used as reference for style standards going forward. As new styles are decided upon, add to the document as needed.

Punctuation and Style (caps, plurals, etc.)

Introduction

The following items are notes, questions, and suggestions to be used as reference for style standards going forward.

Capitalization

Paragraph/Article/Other Titles

Longer document titles and such are all written using sentence caps. This sentence casing helps makes our brand feel more approachable and modern, while still retaining our professionalism. This is also an easier style to implement consistently instead of trying to remember to lowercase articles like “the” and “is,” and helps give merit and respect to proper nouns that deserve to have the recognition of capitalization.

Short document titles/major sections

- The Treasury4 Design Guide

Longer document titles/major sections

Titles that are longer and forming more than 2 lines should be sentence casing to avoid the ups and downs of many nouns vs articles and such in these items

- Choosing the right cash management software for your treasury: A buyer’s guide

Smaller sections and other items

- Why Treasury4 is adapting to the real-world
- Treasury4 can help solve your problems
- Visit our new facility

Button Labels

Button names should always be capitalized. We normally do buttons here in all caps, so this is a moot point.

Use sentence casing everywhere except titles, where you will use title casing. Only capitalize proper nouns and page names. The only other exception is when referencing buttons, fields, or other text on the page, and you must follow the capitalization of that item when referencing it.

CFO is NOT capitalized unless you are addressing something with their title directly in front of their name as a matter of respect or using it as an acronym:

Job Titles

Job titles are normally lowercased.
There is no reason to capitalize a job title unless you are addressing the person directly as [job title] [name], such as the following:

- Hello Sandy, I'd like to introduce you to Chief Executive Officer Sam Carmichael.

Otherwise, most other titles are lowercased:

- This is the chief financial officer of Kalokairi, Sophie Sheridan.
- "This business is thriving" said Hotel Villa's president and CEO, Donna Sheridan.
- "This business is growing substantially" said Bill Anderson, cofounder, investor, and chief operating officer of Hotel Villa.
- I'd like to introduce you to Rosie Mulligan, CPO of Dynamo Financial
- Pepper Gregoris, who is the chief treasury officer of Waterloo Resorts, runs the Treasury department and keeps the team running efficiently.

Names with Titles, Suffixes, and Prefixes

The following are correct ways to write names with their appendages.

- John Smith Jr.
- Smith, John, Jr
- Jane Smith, M.D., will speak at the conference
- The greatest king that England ever had was Paul, John, III.

Plurals

When writing plurals:

- **Regular plurals:** Do not use parenthesis to create singular and plural word options. Use the simple plural. Readers will not look at something that says **Enter your accounts** and get worried because they only have one account to enter, and not multiples.
- **Acronyms:** Do not use apostrophes for creating plural acronyms.

Correct Use	Incorrect Use
Threat Actors	Threat Actor(s)
Bank Accounts	Bank Account(s)
CPAs	CPA's

Punctuation

Oxford Comma/Serial Comma

Use of the Oxford comma (also known as the serial comma) should be standard. There are instances to not use an Oxford comma because the sentence is correct when grouping the last two items together. However, most instances will require the use of the Oxford comma. The following sentences show how the Oxford comma corrects items that may be falsely tied together.

Without Oxford comma:

I love my parents, Lady Gaga and Hugh Jackman.

The above sentence links Lady Gaga and Hugh Jackman together, clarifying that the object of this sentence (your parents) are these two people. Without the Oxford comma, the two final objects are linked together. This is why not using the Oxford comma can lead to confusion when you actually mean separate objects.

With Oxford comma:

I love my parents, Lady Gaga, and Hugh Jackman.

With the extra comma, it is clear you are making a list of things that you love, instead of loving the one object that is your parents, and then identifying them each individually. For some real world examples for our product, see the below sentences for correct use of commas with and without the Oxford.

Correct use of Oxford comma

In Entity4, the Partners page contains partner details, addresses, and contact details to help you track this important information together in one location.

Correct use without Oxford comma

For partner addresses, operating and physical, add the required information before leaving the page.

Other Punctuation

For the rules of other punctuation, refer to the following rules.

Punctuation	Symbol	How to use
Slash	/	Use the slash with no spaces between the words and the slash. Assessments/Analyses
Ampersand	&	Do not use the ampersand in writing. The only place this should possibly be used is in UI where space is very limited. Always write out ‘and’ instead.
Quotation marks	“ ” or ‘ ’	Do not use quotation marks for emphasis. Quotation marks should be used for quoting referenced text information. If quotation marks are used, make sure all punctuation (if at the end of a sentence) is placed within the final quotation mark.
Comma	,	Use the Oxford comma as discussed in the Oxford Comma/Serial Comma section.

Punctuation	Symbol	How to use
Period	.	Always end sentences with a period. If there are several bullets, make sure all bulleted items are either full sentences with periods or shorter blurbs without. Be consistent.
Colon	:	Use a colon either to introduce a definition in a list, or use it at the end of a sentence to introduce a bulleted list or other information. If making a definition list, bold the term at the beginning of the list. Scenario: A single threat event with a threat actor, asset, and effect The four most common types of scenarios are detailed below: [This section is a list of scenarios]
Hyphen	-	Use a hyphen to join two words. Drop-down What-if
Dash	-	Use a dash to communicate a range in numbers. Enter a number from 1-10 to set the number of allowed password attempts.

Stylizing Text

Use the following rules for showing emphasis and naming and reference conventions.

Item	Style	Information and Example
Button names	Bold	Button names, or anything a user interacts with, should be bolded. The entire button name must be used, spelled, and capitalized the same as the button displays in the product. • In the Administration Users table, click **+ New User** to add a new user.
Field names	Bold	Field names should be written exactly as they appear on the screen. • Enter your username in the **Username** field.
References	Italicized	When referencing other websites, documents, or other places to read outside of the text the user is reading, italicize. • For more information, refer to the *API Administration and User Guide*.
Numbers		Numbers 1-10 must be written out. The only exception is when telling a user to enter a number into a field such as if you are having the user set a certain number for password reset. • Select at least two scenarios to add to the assessment. • In the **Attempts** field, type **3** to set the number of password attempts. Numbers greater than 10 should be written in numeral form. • Select all 15 scenarios to add to the list.

Miscellaneous

And/or
In most cases, do not use and/or. Either rewrite the sentence to make sense without it, or find the most acceptable of the two to use.

For example:

This message and/or attachments are confidential.

Can be rewritten as either of the following:

This message and its attachments are confidential.

This message and any attached files are confidential

Brand name
Brand name is written as Treasury4 or T4 if needed to fit within a smaller area. Solution names are written out in full unless otherwise needed (Entity4, E4).

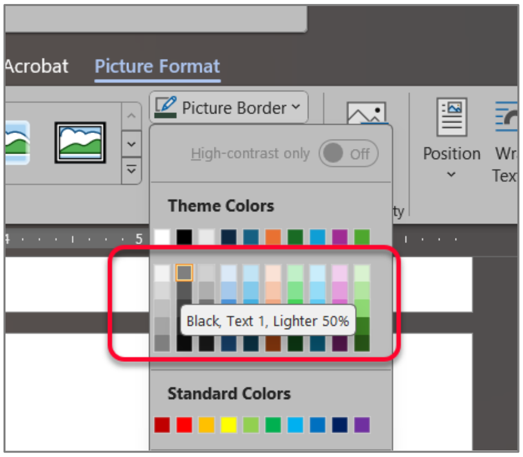
Buttons and Fields
Screen capture the button if possible.

- **In documentation:** Use bold and write the text shown exactly as on the button itself (mixed case usually). Avoid quotes for buttons in documentation.
  - Click **Create Entity** to create item and continue adding details.
- **In release notes:** Use and capitalize text as shown on the button/screen.
  - Referring to pages in the system: When in a heading, capitalize the word page. When in a sentence, page is lower-case.
  - For example: On the Entity page, click the filter to sort the column.

General Items
- Avoid orphans on pages
  - (for example, use the **Keep with next option** or add page breaks to keep captions on the same page as its associated screenshot and to avoid having only one line running onto the next page).
- Use the attention styles typed with title case to indicate a user should pay attention to something.

Graphics, Screenshots

- Standard screenshot size for full page: **1024x800 px**
    - Avoid taking entire page screenshots, except where context is necessary. Try to minimize graphic to what is most relevant.
- Borders for graphics are as follows:
    - Border standard for Word as follows:



- Captions or figure numbers: No captions unless really needed (use sparingly). No figure numbers.
- For image callouts: No shadow, color, line weight, arrow style, highlight color, text font and size, etc. I usually do it all in Snagit because Word gets mixed up when there are many graphics and anchors in a doc.

MS Word	Snagit
2pt line	4pt in general, but change as image gets larger
255 RED, 4 Green, 55 Blue #FF042D	255 RED, 4 Green, 55 Blue #FF042D

Example Writing Section

Tab 2. Risk Assessments: Pulling Assessments

The second tab in the API integration document contains a table of risk assessment data. Run the query process below to pull risk assessment details from the platform.

Pull the Risk Assessment Details from the Platform

To run the GetTransactions query:
Time to complete: About 1 minute

1. In the spreadsheet, open the **Transactions** tab.

2. In the Excel header, click **Data**.

   The Data tab displays.

3. Click **Queries & Connections**.

   The Queries & Connections pane displays.

4. In the **Queries & Connections** pane, click **GetTransactions** and click the **Refresh** button.

   The spreadsheet populates the Excel table with the platform's transaction data.

Select the Required Assessments for Data Export

From the new list of risk assessment data, use the following process to select the assessments that you will be using for data exports and build a table to use later.

To build your transaction list:
Time to complete: About 1 minute

1. On the **Transactions** tab, use the search or the filter to find the needed assessments.

2. Copy the transaction information from the first two columns (**Transaction.id** and **Transaction.name**) and paste it into the blue table at the bottom.

3. Continue copying risk assessment information to the bottom table until you have gathered all the assessments needed.