

Document type

Guide

Document series

Documenting documentation

Document purpose

Style guides are a critical part of any documentation project. They help promote standard practices and consistency across documents. Not only do style guides set expectations for how something should be documented, but they also create familiarity and trust for users when followed consistently.

This document was a work in progress, evolving with the maturity of the documentation capabilities of the SMEs.

How I helped

There were no official or sustainable documentation practices, processes, or resources available when I started. I developed the processes and resources, trained the organization to follow and use them, and supported them as the sole writer and content strategist. These processes and resources resulted in a 30% internal efficiency gain and a 60% customer satisfaction increase.

Audience

SMEs new to documentation efforts.

Notes

- Links to inaccessible proprietary resources (such as other help documents) are represented as link.

Documentation style guide

Summary

Following a style guide promotes consistency across content and encourages user trust. It also makes using help content easier and faster for everyone. The guidance in this style guide should be followed for all external content.

Good to know

To get the best experience with Doc360 for yourself and for our users, use the following best practices:

- You can save an article draft as you go with **ctrl+S** .
- Don't copy and paste from a Word document.
 - Word often brings over unwanted formatting that only displays once an article is published and visible to users.
 - If you absolutely have to copy and paste from Word, make sure to use the remove formatting option in the Doc360 editor. You may then need to reformat some items, such as lists.
- Do not copy and paste images or videos directly into the editor. These will break and become inaccessible the next time you update the article. Images and videos should be uploaded to the appropriate folder in the Doc360 Drive. Learn more about handling [images and screenshots](#).

Styles

Following these styles promotes consistency across articles and increases user trust and satisfaction.

Writing style

- Write from the client's point of view.
 - What are they trying to accomplish?
 - What do they want to know about it?
 - What do they not need to know about it?

- Leave out information that's not immediately relevant to avoid confusing clients.
- Use "you" to talk to the client, instead of "the user".
- Be conversational and friendly, but professional and to the point.
- Focus your article on a single process or purpose. Use and link to additional articles to cover related but not immediately relevant information.

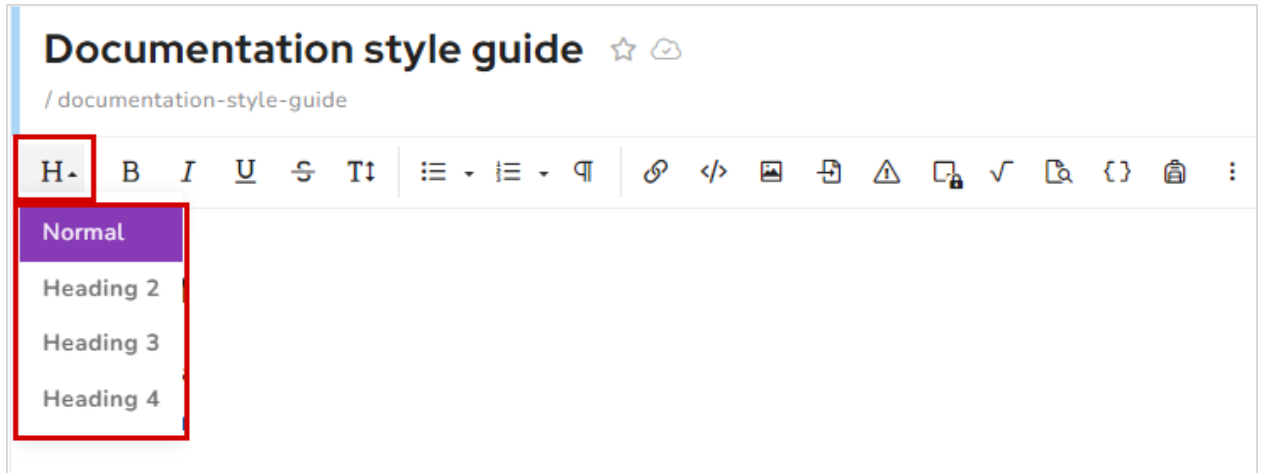
Article titles

Article titles should follow similar naming conventions. Use active voice and keep it simple. This lets users know what kind of content to expect.

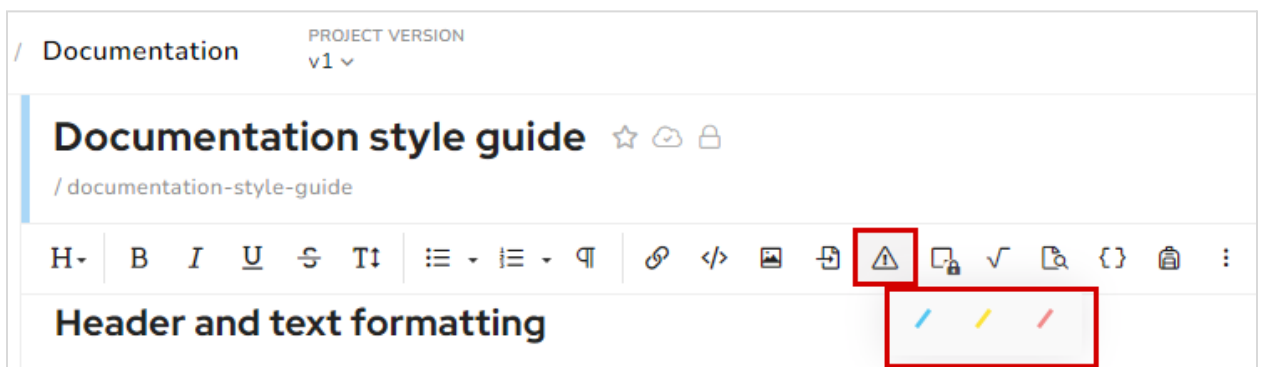
- **Overview** - [Product, process or tool] - Overview
 - Examples:
 - Microsoft Word - Styles - Overview
- **How to** - [process name or description]
 - Do not include "how to" in the title.
 - Examples:
 - Create new customer accounts
 - Set up email notifications
- **Troubleshooting**
 - Troubleshooting articles can be titled in a few different ways to best meet the needs of our users
 - If it's short, use the exact error name the user sees.
 - If the issue isn't straightforward, name the article based on what the user is prevented from

Heading and text formatting

- Use the provided styles in the formatting menu. Do not create your own or manually adjust font size, color, or background.



- Use bold text to identify a menu, button, or field that users should interact with. Highlight the text and press **ctrl+B**.
- Do not use the underline option. This reduces readability. To emphasize text, use bold and/or italics.
- Use the appropriate Snippets, Variables, and Glossary terms for text or phrases that are used often. Using these tools makes it easier and faster to update text later.
- Use **callouts** for important information that users should be aware of.



Note

Use the blue informational callout to draw attention to important information that users should know. This information won't break or cause problems later if a user doesn't read it.

Caution

Use the yellow caution callout to draw attention to information that users need to know to prevent errors or problems later in a process.

Warning

Use the red warning callout to warn users of critical information that will result in undesirable or irreversible outcomes.

Screenshots

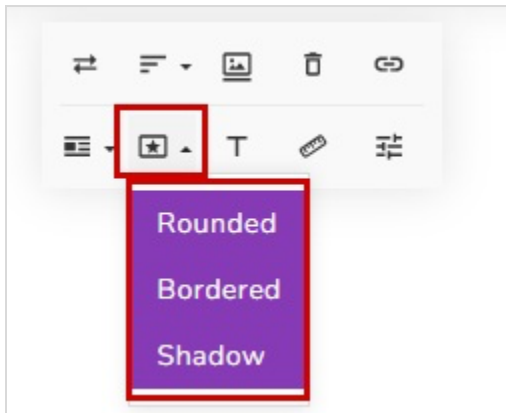
IMPORTANT: Name your screenshots following this naming convention as closely as you can:

Product - Menu - sub-menu - screen - section of screen - focus of screenshot (button, link, or field)

Learn more about why following an image naming convention is important in [images in documentation](#).

- Naming examples:
 - Microsoft Teams - Settings - Notifications - Message Preview - Chat - Edit button
 - Document360 - Article - Edit - Format bar - Callout - Options - Blue informational
- Use boxes to draw focus to an area of an image. If you're using SnagIt:
 - The box color should be: **#D30000**
 - Do not use a shape shadow (this covers any nearby text and makes it harder to read).
 - Do not use arrows.
 - Do not add text boxes to screenshots (this reduces accessibility). Any instructional text should be included in the article text.

- Once a screenshot has been added to an article, use Doc360's border formatting options: **Rounded**, **Border**, and **Shadow**.



- Make sure all PII (personally identifiable information) has been blurred or removed from the image. This includes things like
 - Names
 - Email addresses
 - Physical addresses
 - Phone numbers
 - IP Addresses
 - Company or customer names
- Mentions of [company] or [software] must be removed from all external screenshots to support client white-label requirements.

Learn more about [managing images in documentation](#).

Lists

Lists are an important formatting option that help increase readability and clarity for users.

TIP

Use **shift+enter** to create a new line under the current list item to add an image, a note, or continue text on a new line without creating a new list item.

Numbered lists

- Use numbered lists for sequential steps in a process.

- All process documentation should use numbered lists.
- Do not manually type the number before the line. Instead, use the numbered list format option in the formatting menu.



Bulleted lists

- Use bulleted lists to display related information in a concise and easy to digest format.
- Try to use bulleted lists instead of paragraphs to allow users to skim and absorb information faster.

Paragraphs are appropriate to use when the information needs more detail than comfortably fits into a bulleted list or if the information doesn't fit with the theme of a bulleted list. You can also use a paragraph to provide context preceding a bulleted list.

