Northwestern University IT Service Manager Knowledge Base Style Guide

Prepared by

NUIT Communications

Northwestern University Information Technology (NUIT)

Northwestern University

Updated May 3, 2013

CONTENTS

Northwestern University IT Service Manager Knowledge Base (KB) articles should provide end users with clear, consistent, and accessible instructions for common technology questions. Following this guide will provide the most useful information to the University community, its guests, or other interested parties.

Once articles are submitted, they will be reviewed and approved based on the content and formatting guidelines outlined in this style guide.

1. WRITING A PUBLIC KNOWLEDGE BASE ARTICLE

Writing content specifically for the web requires special rules and guidelines to ensure information is understandable, concise, and consistent. Web-oriented writing and editing are essential to sharing information quickly and in an easy-to-digest format.

1.1 TITLE

To provide consistency and make it easy for users to find the correct information, titles should be written in the first-person (I, me, my) and in the form of the question such as "How do I…?", "When do I…?", etc.

The title should also address if the answer applies to a specific operating system, platform, or device (e.g. Windows 7, Mac, Android, etc.), if applicable.

> **EFFECTIVE:** How do I set up VPN in Windows 7?
>
> **LESS EFFECTIVE:** Set up VPN.

Do not repeat the title in the Description field or it will appear as duplicate information in the KB dashboard.

> **EFFECTIVE:**
>
> How do I download and install Microsoft Lync for Windows… Download the Lync Client based on your operating system: Lync 32bit Client Lync 64bit Client Lync Tabbed Chat Client (beta) allows you to [more…]
>
> **LESS EFFECTIVE:**
>
> How do I download and install Microsoft Lync for Windows… How do I download and install Microsoft Lync for Windows? Download the Lync Client based on your operating system: Lync 32bit Client Lync [more…]

1.2 DESCRIPTION

Step-by-step instructions should completely and concisely address the title question following the writing guidelines outlined below. Do not repeat the title in the Description field.

1.2.1 ASSUMING USER KNOWLEDGE

For the Northwestern community, assume basic technical knowledge (how to open a program, locate a menu item, etc.). Instructions should be written such that faculty, staff, students, researchers at all levels of technical expertise can follow with minimal assistance.

1.2.2 GENERAL WRITING STYLE GUIDELINES

Write in **complete sentences**, including a subject, verb, and object.

> **EFFECTIVE:** *Enter* your **NetID** in the **Username** field.
>
> **LESS EFFECTIVE: NetID** in **Username** field.

Use **simple language**, **omit non-essential words**, and **avoid technical jargon** wherever possible.

> **EFFECTIVE:** *Enter* your **NetID** in the **Username** field and *click* **OK**.
>
> **LESS EFFECTIVE:** *Type* user data at **login screen** and *click* on the **OK button** to continue.

Use **active voice** to make instructions clear and direct.

> **EFFECTIVE:** The system displays the Print screen.
>
> **LESS EFFECTIVE:** The Print screen is displayed by the system.

Use **present tense** to make the text simple.

> **EFFECTIVE:** The system displays the **Print** screen.
>
> **LESS EFFECTIVE:** The system will display the **Print** screen.

Address the user in the **second person** (you, your) to make it clear who must complete the action.

> **EFFECTIVE:** *Enter* your **NetID** and **password**.
>
> **LESS EFFECTIVE:** *Type* the user's **NetID** and **password**.

End each sentence with a period **unless** it could cause confusion about what to enter in a text field, in which case no period is needed.

> **EFFECTIVE:** *Select* **Set VPN server** and *type* **vpn-nu.vpn.northwestern.edu**
>
> **LESS EFFECTIVE:** *Select* **Set VPN server** and *type* **vpn-nu.vpn.northwestern.edu.**

1.2.3 WRITING STEP-BY-STEP INSTRUCTIONS

Step-by-step instructions should be written as a numbered list.

If the instructions apply to a specific user role with a system (e.g. instructor, student, TA, administrator, etc.), the role should be mentioned in the first line of the instructions.

Each step in the description should express a single action in the sequence of instructions and should not be overly complex or involved. If a complex process needs to be completed, it should be broken down into simpler, more explicit steps.

Some steps may require users to enter content into multiple fields within a window or require additional instructions. In these cases, it is acceptable to enter this information as a second level **bulleted** (not numbered) list. Instructions should not go beyond a second level list.

Each step will usually begin with, and always contain, an *action*, which is always *italicized*. The **noun** receiving the action is usually **bolded**. Action words should be consistent within the instructions, i.e. do not use *type* in one step and *enter* in another step. A list of preferred action words and their uses is included below.

> **Preferred Action Words or Terms:**
>
> - **Check/Uncheck**—For items where a check box needs to be selected.
> - **Choose**—A menu option (e.g. *Choose* **File>Print** from the menu). Also note the use of **>** to separate menu options.
> - **Click**—A button on the screen (e.g. *Click* **OK**).
> - **Double-click**
> - **Download**—Usually hyperlinked to a file. (e.g. *Download (.exe)* **Symantec Endpoint Protection**.)
> - **Drop-down menu**
> - **Enter**—Text must be typed into a field.
> - **Log in** or **Log in to**--The act of entering information to access system or account. Note that "login" is a noun referring to a web page or part of a web page where a user would go to enter information to access a system. "Log-in" is not preferred usage.
> - **Open**—An application or file.
> - **Press**—A key or other physical button (e.g. *Press* **Windows key+L** to lock your screen.)
> - **Right-click**

If there are two or more ways to complete a task, provide the shortest, simplest way. Don't confuse the issue by providing multiple sets of steps. Note the use of **>** to separate menu options.

> **EFFECTIVE:** *Choose* **File>Copy**.
>
> **NOT EFFECTIVE:** *Choose* **File>Copy** or *right-click* and *choose* **Copy**.

1.2.4   ADDING LINKS

It may also be helpful to the user to include a link to additional instructions or information in the Description text. For accessibility purposes, it is important that the text of a link is descriptive of where the link goes, preferably the name of the linked page; don't use links that say only "click here."

> **EFFECTIVE:** Complete the following steps *OR* use the <u>Automatic Setup Tool for Outlook</u>.
>
> **NOT EFFECTIVE:** Complete the following steps *OR* <u>click here</u> for the Automatic Setup Tool for Outlook.

If a link goes to a file (PDF, DOC, XLS, ZIP, etc.), include the file type as part of the link in parentheses.

1.2.5   INCLUDING SCREENSHOTS

Consider adding a screenshot if it will assist the user in completing a task. For instance, if more than three setting fields need to be changed in one window, include a screenshot of the final dialog box with all the settings completed. A screenshot would not be necessary for a step where the user only needs to click OK.

Screenshots should support the step they are associated with, generally a dialog box, menu, or applicable part of a window. It is not necessary to include a screenshot of an entire screen or application window if the user only needs to see a selected area to complete the task.

IMPORTANT: All images **must** include descriptive alternative text to ensure the content is accessible for all users. *Before adding an image, refer to section **3.2 Images***.

EFFECTIVE: This screenshot is useful because more than three fields needed to be changed and it provides a visual of what the window should look like once the user completes the steps that have been written out.

In the L2TP/IPSEc PSK VPN screen:

- *Tap* **VPN name** and *enter* **Northwestern VPN**
- *Tap* **Set VPN server** and *enter* **vpn-nu.vpn.northwestern.edu**
- *Tap* **Set IPsec pre-shared key** and *enter* **northwesternvpn**
- *Uncheck* **Enable L2TP secret**.
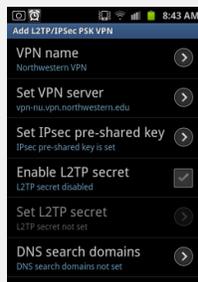
LESS EFFECTIVE: This screenshot is not as useful because there is only one possible action for a user to take, which is an extremely simple task. It also takes up a large amount of space within the step-by-step instructions.

The **Network is ready to use** confirmation window appears. *Click* **Close**.
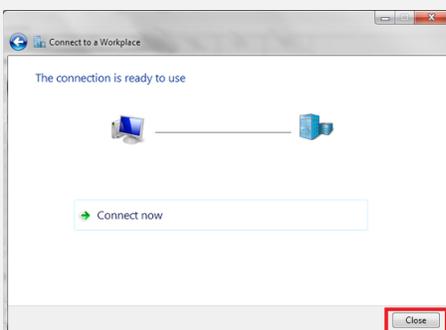
Additional Examples can be found in the Writing Alternative Text for the ITSM Knowledge Base guide at
http://www.it.northwestern.edu/bin/docs/service-manager/kb_alttextguide.pdf

2. CATEGORIZING A KNOWLEDGE BASE ARTICLE

KB articles fall into three top-level categories: "I want information about using…", "I want to configure…", and/or "I'm having a problem with…"; within each category are sub-categories of services that narrow the topic: e.g. Northwestern Wireless, Course Management System/Blackboard, VPN, etc.

In order to ensure that all articles are categorized properly and to make them searchable by users, a solution type and service **must** be selected from the drop-down menus below the Description field before submitting each article.
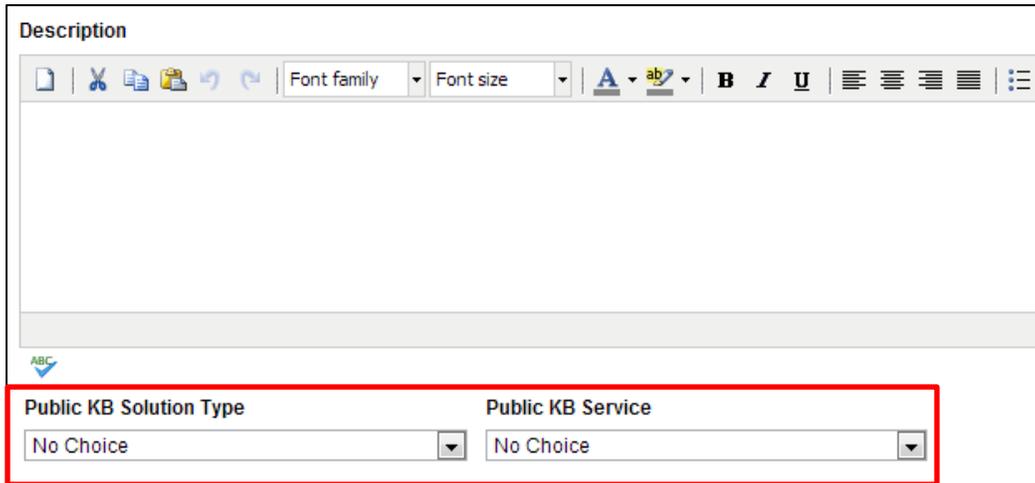
Under Public KB Solution Type, *select*:

> **Information** if the instructions provide information about **using a system and/or service**.

> **Configuration** if the instructions help a user with **configuration or setup**.

> **Problem** if the instructions help a user with an **error or problem**.

Once a solution type has been selected, *select* the applicable service (e.g. **Course Management/Blackboard**, **Northwestern Wireless**, or **Virtual Private Network (VPN)**) from the Public KB Service drop-down menu.

3. FORMATTING A KNOWLEDGE BASE ARTICLE

Consistent formatting across KB articles supports a cohesive look for the system and the information it provides, making it easy for users to follow. As a reminder, articles must follow these guidelines in order to be approved for the public KB.

3.1 DESCRIPTION

By default, content entered in the Description field is in Verdana 10 point font. The easiest way to ensure all text is correctly formatted is to highlight all of the text within the KB text editor, then apply the font family (Verdana), size (10 point), and alignment (left-aligned) from the Description field drop-down menus. Content in the KB text editor must be set to the following:

Font family:	Verdana
Font size:	10pt
Alignment:	Left-aligned
Line breaks:	A double line break (i.e. one blank line) should be entered between paragraphs, and between pictures and text.
Numbering and bullets:	Use the numbered or bulleted list icon in the toolbar to apply; do not type in numbers or bullets. Second-level lists should use bullets instead of numbers.

3.1.1 COPYING AND PASTING TEXT

To copy and paste text into the Knowledge Base text editor, you **must** use a plain text editor like Notepad or Text Edit before copying and pasting. Formatting like bold, italics, numbering, or bullets should **only** be applied within the KB text editor.

Do not copy from Microsoft Word due to hidden formatting that affects the final article.

3.2 IMAGES

All images (JPG or PNG files) must be uploaded individually using the **Insert/edit image** uploader (do not use the **Paste from clipboard** icon). Settings **must** be entered before closing the Insert/edit image dialog box; settings **cannot** be edited or changed after the dialog box has been closed.

Image settings should generally follow these guidelines:

|	
Alignment:	Default (-- Not set --)
Dimensions:	Max width 600 pixels. When setting width, leave height blank to ensure proportional resizing.
Border:	Only necessary for images that require a border for clarity
Vertical space:	10 pixels
Horizontal space:	Leave blank

The image pertaining to a step should be included in that step, appearing below the text. Separate the image from the text with a SHIFT + ENTER line break.

3.2.1   IMAGE DESCRIPTION

In order to comply with the Americans with Disabilities Act web accessibility guidelines, the **Image description** field must describe the image in a way that will convey the same information provided by the image to users who are unable to view it. Describe the relevant content of the screenshot in concise detail – What window is it (i.e. what is in the window title bar)? What is selected? Think about what information is being conveyed in the screenshot and match the important landmarks in order as best you can. If there is text entered in fields, describe it in detail.

It is not necessary to describe what actions the user should take (e.g. *Click* **Next**) if they are described in the accompanying instructions.

It is not necessary to indicate that the image is an image or a screenshot (e.g. "This is an image of…" or "Screenshot of…").
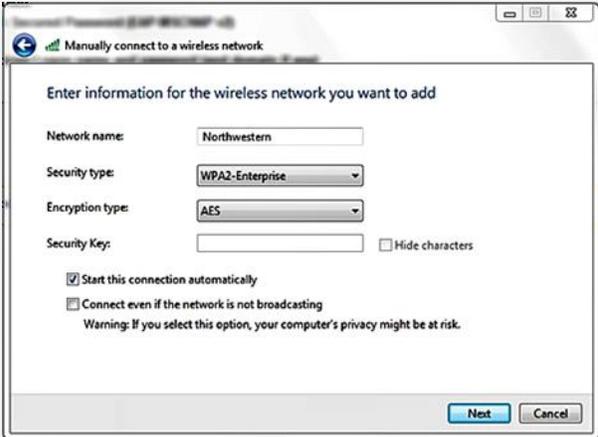
EFFECTIVE: Descriptive alternative text for the above image would be: Manually connect to a wireless network window. The Network name field is filled with Northwestern. The Security type menu has WPA2-Enterprise selected. The Encryption type menu has AES selected. The Security Key field is blank. The Start this connection automatically checkbox is checked. The Connect even if the network is not broadcasting box is not checked.

LESS EFFECTIVE: This is a screenshot of a wireless network setup.

4.   EDITING AN EXISTING KNOWLEDGE BASE ARTICLE

When editing a KB article, **do not** use the **Append New Description** text box at the top of the entry. Entering text in this field will remove the ability to edit the original content later. Instead, edit existing content using the second box titled **Edit Most Recent Description**.

If significant changes are required to an article, it may be preferable to delete the article and create a new one.

Knowledge Base Article Checklist

- **Title**
  - ☐ Title is written as a question in the first person (e.g. How do I…?)
  - ☐ When appropriate, includes user role, specific operating system, platform, or device (e.g. "As an Instructor, how do I change a grade in the Course Management System?" or "How do I set up VPN in Windows 7?")

- **Description**
  - ☐ Title is not repeated.
  - ☐ Sufficiently answers or explains the title question.
  - ☐ If copying and pasting, use a plain text editor like Notepad or Text Edit (**do not** copy and paste from Word).
  - ☐ *Actions* are *italicized*. N**oun** receiving the action is **bolded** (e.g. *Click* **OK**.)
  - ☐ Instructions are written as a numbered list, second level lists are bulleted; instructions should not go beyond a second-level list.
  - ☐ Use complete sentences with period at the end of each step, unless the period could cause confusion about what to enter in a text field (e.g. No period at the end of "*Select* **Set VPN server** and *type* **vpn-nu.vpn.northwestern.edu**")
  - ☐ Active voice, present tense, second person (you, your).

- **Text Formatting**
  - ☐ **Font family**: Verdana
  - ☐ **Font size**: 10pt
  - ☐ **Alignment**: Left-aligned
  - ☐ **Numbering and bullets**: Numbered or bulleted list should be applied via the toolbar.
  - ☐ **Line breaks**: A double line break (i.e. one blank line) should be entered between paragraphs, and between pictures and text.

- **Screenshots/Images**
  - ☐ If more than three settings need to be changed in a single window, a screenshot of the complete window should be included.
  - ☐ **File Type:** JPG or PNG
  - ☐ **Image Description:** Appropriately detailed alternative text is provided.
  - ☐ **Dimensions:** Max width 600 pixels. When setting width, leave height blank to ensure proportional resizing.
  - ☐ **Border:** Only necessary for images that require a border for clarity.
  - ☐ **Vertical space:** 10 pixels
  - ☐ **Horizontal space:** Leave blank

- **Categorization**
  - ☐ Categorization by solution type and service is **required** for all public KB articles. *See section 2 Categorizing a Knowledge Base Article for details.*