Documentation Style Guide for Printed Material

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Confidentiality Statement

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Introduction

Overview

The Documentation Style Guide for Printed Material contains style standards for all Global Information Services (GIS) documentation. Style in this context means the organization of material, the formatting of text, the use of conventions for presenting information, and the production of the final document as printed copy or other media.

This guide is intended for the technical writers responsible for researching, writing, editing, and producing documentation for the GIS department and GIS clients. It is also intended for all GIS personnel supporting GIS and the technical writers.

All types of documentation are covered by these standards including, but not limited to, user manuals, administration manuals, procedure guides, technical references, project reports, and other materials that are printed and bound. Technical writers also produce quick reference cards, flyers, meeting reports, and other material which are not necessarily bound. Although each type of document is different, they all have common elements. The standards in this guide apply to all printed materials produced.

Many different writers are anticipated to contribute to GIS documentation projects. Therefore, a structured methodology is needed which uses templates and style guides essential to the development of uniform documentation. Since these writers have knowledge of multiple desktop publishing applications, this document provides general guidelines appropriate for all applications.

This guide also includes Mobil Corporation standards for the use and appearance of their registered trademarks.

The standards presented in this guide are intended to do the following:

- Ensure that all documentation is easy to read, use, and understand so users can efficiently access information.

- Provide a flexible format that is adaptable to different types of documents while ensuring a uniform, recognizable, attractive appearance.

- Provide an effective document structure that increases the writer's productivity and reduces rework and revision cycles.

- Reduce printed documentation maintenance costs by making updates easier and quicker.

Guide Contents

This guide includes the following chapters.

Introduction	Purpose, audience, and objectives of this document
Organization	Common chapters or topics of standard documentation and the structure for electronic files
Format	Formatting conventions for documentation including the paragraph tag style, fonts, and table and list design
Graphics	General graphics information for documentation as well as Mobil Corporation standards for the use and appearance of registered trademarks
Practices	Writing conventions and styles specific to well written documentation
Review	Information regarding the edit and review stages of the documentation process
Production	Guidelines and suggestions regarding document printing and distribution
Visual Presentations	Standards and guidelines for visual presentations including format and color
References	Bibliographical references to documents used as reference to the creation of this document

Organization

Overview

The Organization chapter presents the standard outline for manuals. Many other forms of documentation are produced, but when a system, procedure, or process requires an introduction and separate sections or chapters, a manual is structured in a standard format. The elements described in this manual can, however, be applied to other types of documentation such as white papers, meeting reports, project plans, and so forth. Apply the standards correspondingly so that all documents have a consistent design.

The outline described in this chapter contains places for all possible front and end matter. Once your material is organized in this fashion, writing is easier and more productive. Some documents may have special chapter needs beyond the standard organization presented here. When this happens, you can address those situations better with a standard outline in place.

Common Components

The list shown below indicates possible components of a manual. You may find that you need many more components for a manual describing a larger process or system, or that many of these components can be compressed into a single chapter for a smaller scale manual.

- Title Page
- Table of Contents
- List of Figures and Charts
- Introduction
- Content Topics
- Appendix

- Index

- Other Components

Each of these components is discussed in the sections that follow.

Title Page

When the document is bound, the outside cover page is clear, allowing the title page to be visible. The page should be neat, attractive, and contain pertinent information about the manual, including the following:

- Document title

- Published date

- Company and department name

- Confidentiality statement or other required legal notices or disclaimers

For some manuals, other data may be required such as a software version number, if available. And, if the manual is a revision of a previous one, an original issue date and revision date might be included.

Do not include extensive acknowledgments or long lists of contributors or authors. If the manual documents a team project, the team members may need to be listed, but should be placed on the reverse side of the title page above the confidentiality statement.

The title page always contains the standard confidentiality statement. To satisfy legal requirements and ensure uniformity, use the standard wording of this statement as follows.

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This chapter, like all the others, use the first, left, and right page layout as defined in the Format chapter. The front and back of the title pages are not numbered. The title page uses a special title page layout as defined in the Format chapter on page 3 - 9.

Table of Contents

The table of contents outlines the material covered in the manual and helps the reader find needed information. The table of contents lists chapter names, first-level, second-level, and third-level headings, and corresponding page numbers. It is a good idea to include fourth level headings if the manual contains very complex, detailed material.

Use heading styles defined in the Format chapter to mark headings in the text. You will use the headings to generate the table of contents. Use lower case roman numerals to number the pages. The table of contents chapter uses the special table of contents page layout as defined in the Format chapter.

List of Figures and Charts

If the manual has a great number of supportive illustrations such as screen shots, configurations, and charts, include a separate list of these after the table of contents, but within the same chapter. This list can be generated using your desktop publishing application.

As this section is connected to the table of contents, continue the page numbers in lowercase roman numerals.

Introduction

The Introduction contains necessary document information and tells the reader about the manual itself and explains how to use it. You should include an abstract of all chapters. See the chapter abstracts in the Introduction to this guide on page 1 - 2 as an example with chapter abstracts.

The following sections may be included in the Introduction if small enough. Otherwise, separate topics or files may be created. Note that not all sections are applicable to every manual.

Section Names	Descriptions
Intended Audience	The definition of the audience gives direction about who will benefit most from the document. Not every reader will need all parts, so point out particular sections to designated readers.
Purpose of the Manual	The purpose tells the reason the material was documented or its intent.
Organizational Information	This information provides a road map for the manual and includes the chapter titles and describes the contents of each.

Section Names	Descriptions
Special Features of the Manual	Features point out any unusual sections or give hints about how the material can be used.
Conventions Used	Conventions show the way text is presented, such as key names entered in brackets, system messages in courier font, commands in bold, and variable data in italics. See the Practices chapter for more information about conventions.
Related Documentation	This section lists any supporting documentation which can help in understanding the material. Include reference links to the associated sections.

All Introduction chapter pages are numbered with the chapter number, a bullet, and the page number, such as 2 • 4. Make the page count even as defined in the Format chapter.

The following sections were not included in the table above because of information associated with each section. You may wish to create separate chapters for these depending on the amount of content.

Introducing the System

If you are documenting software, this section presents basic information about the concepts and capabilities of the software. Discuss the overall structure of the software and the relationship of the software's modules. Use flowcharts, illustrations, and/or comparisons to non-computer methods of accomplishing the tasks. Do not go into detail about how the system actually works, such as which key to press; simply alert the reader to the software's capabilities.

Introducing the System should also explain why the software is important to the user and how the information relates to other systems. Point out how the software makes the user's job easier or faster. Motivate the user to want to use the software and continue using the documentation, if necessary.

Getting Started

The purpose of the Getting Started section is to tell the users what they need to know to begin using the system or software. Include the following information:

- Log on and log off instructions
- Standard keystrokes
- Platform specific terms, such as Windows or UNIX navigation
- Important terms
- System set-up instructions

This section is designed for flexibility. Tailor the contents to meet the needs of the particular system described in your document. Be creative when determining how this section can best serve the documentation you write.

Content Topics

The main chapters of the manual comprise the bulk of the manual and may be a single topic or many topics. The structure may be purely menu-driven and present orderly descriptions of each menu choice. It may be dictated by the groups of data, or may describe a task. Organize the sections according to tasks performed by the system, for example:

- Setting up the database

- Updating the data

- Creating a report from the data

Explain each task in detail, including step-by-step instructions for completing that task. When designing the content of the main chapters, consider the following questions and include the answers in the design of the content chapters.

- Is it beneficial to the user to create the documentation by process or by task?

- Does the user follow certain steps when performing a task and thereby need task oriented documentation?

- Does the user follow application menus when completing a task and thereby need process oriented documentation?

If many chapters are used, make sure the reader is aware of what subjects are covered in each topic so the user may find needed material rapidly. Consider including a table of contents at the beginning of each topic to meet this objective.

There are two formats for presenting procedures. The *action-response* format is effective for presenting procedures. It lists the action taken by the reader, followed by the system's response. Or, you can describe a procedure by listing the *steps* to complete it.

Action Response Example

Here are two formats for showing user entry and system response. When you use steps to describe a task, be sure that each step is an action.

Example: At the System prompt, enter your *USERID*.
             The system prompts you for your password.

             Enter your *password* to display the Main Menu.

Steps Example

The following example demonstrates steps where the user action and the corresponding system action are described. Note that each step begins with an action verb.

1. Log on to the network, making sure you have access to the drive and directory where the software is to reside.

2. Start Windows.

3. Insert the installation disk into the disk drive.

4. Select `Run` from the Eile menu and type **`a:\setup.exe`** in the command line field.

5. Click `OK`. The installation program displays a dialog box with the message `Your default directory is c:\ngh and the files will be copied to it.`

6. Enter a new path if necessary.

7. Type **`t:\apps\ngh`** in the field provided and then click `CONTINUE`.

Appendix

An appendix topic is added to a document when additional material is useful but not required. Appendices may include the following information.

Appendix	Contents
Abbreviations and acronyms list	Definitions of acronyms and abbreviations used in the manual
Glossary	Definition of terms, commonly used words, or phrases that may be unfamiliar to the reader
References	Sources the reader can consult for additional or related information
Reports	Sample reports or documents produced by the system

Depending on the complexity of the system described in the manual, you may need multiple appendices.

If sizable, make a separate chapter for each appendix. Otherwise, combine all appendices under one chapter called Appendices, starting each new section with the right page layout as defined in the Format chapter. Place the appendices in order by importance, lettering the first appendix A.

For the page numbering format, use the appendix letter, a bullet, and the page number, such as A • 1 for page one of Appendix A.

Index

An index is not required for every manual. It is essential, however, in a technical document with many terms and tasks. A good index builds the reader's confidence in the system by helping the reader find information quickly and easily. The index should contain the table of contents headings and terms the user may eventually search. However, the index should not simply be a replica of the table of contents. It needs both terms and concepts.

In addition, include buzzwords and important terms used in graphics and screen labels. Think of different ways the reader might want to reference the same information and include these words as well. If the manual is large, you may need to research indexing conventions so that yours fits the purpose of the material.

If you need to index items which begin with non-alphabetic characters, such as "386 requirements" or "56 code," include a *Symbols* section at the very beginning of the index. Format it just like the other index sections for A, B, C, and so forth.

When the index is complete, check these items:

- Ensure that all index items provide the reader with the correct link.
- If some entries seem overanalyzed, try to combine some of them by modifying your markers.
- Simplify lengthy subheadings in all associated markers.

Number your index pages with the word Index, a bullet, and the page number, such as Index • 1 for page one.

Use your desktop publishing application tools to mark index entries and enable you to generate the index copy. See your word processor manual or online help files for indexing information.

Other Components

Each project has different documentation requirements. The following are some other components that may be needed.

- System messages list — An alphabetical listing of each system or error message and brief explanation of the message.
- Troubleshooting — A section describing possible problems, causes, and solutions. Some systems may need an entire section on troubleshooting tips, the most common and/or serious problems readers may encounter when using the system.

If large enough, these topics should be created as separate chapters and placed within the content of the manual. Otherwise, create these as sections within the Appendix.

File Structure

Since so many writers may contribute to the project, a document file structure must be considered. Create a book or master document with separate files for the title page, table of contents, lists, introduction, chapters covering the bulk of the material, appendices, glossaries, and an index. Use a file naming convention that sorts the files in their logical order or provide a text file with the file names listed in the correct order. This is helpful when you must send all the files to someone else for printing. The guesswork about the correct order of the chapters is removed.

Place all files on a shared network drive in an appropriately named directory as the project dictates. For example, the FMS directory contains all the files for a fictitious FMS Guide. Then, assign file names with chapter topic embedded and incorporate the application name, if possible. Place the document files themselves in a subdirectory named DOCS. The following is a list of sample file names for a fictitious FMS application.

FMSBOOK.bk	Book file, if applicable
FMSCOVER.ext	Cover file
FMSTOC.ext	Table of Contents
FMSMAIN1.ext	Chapter 1
FMSMAIN2.ext	Chapter 2
FMSMAIN3.ext	Chapter 3
FMSAPPXA.ext	Appendix A, Glossary, as an example
FMSAPPXB.ext	Appendix B, Error Messages, as an example
FMSINDX.ext	Index
FMSALL.doc	Master Word document, if applicable

If you have files for supporting data, such as report samples, a glossary build, and screen capture images, you can name them so that they appear alphabetically in a group below the chapters, or create a separate subdirectory named GRAPHICS, SAMPLES, or DATA for all extra material.

The project should specify a directory name such as the FMS directory described above. Beneath this directory, there may be several sub-directories.

- DOCS

- GRAPHICS

- SAMPLES

- DATA

Format

Overview

The Format chapter presents the standard format for printed documents. The format described in this chapter is applicable to all documents regardless of which desktop publishing application you use. You can organize and write your manual first and apply formatting later or format as you go. This chapter assumes you know how to apply the format to the documents using your particular desktop publishing application.

While this information is directed primarily toward the construction of a manual, many documents are not multi-chapter manuals. Documentation also includes meeting reports, white papers, and quick reference materials as well as other types of material. Use the standard format elements as much as possible so that all documentation retains the same look and feel.

Style

The standard format style is contained in a style template file set up according to the following format standards. This document uses the same structured page layout as the template. Note the cover, the table of contents, headers, footers, chapter title placement, different levels of headings used, and table format. Each section contains information to assist you in setting paragraph styles.

Page Layout

The standard document uses the following page style attributes.

- Page layout is 7.5 inches x 10.0 inches, portrait oriented.
- Margins are set 0.25 inches from each edge of the page.

- Text is indented 0.5 inches from each margin edge and body text extends 0.5 inches from the left margin.

- Text is left justified, ragged right, and single spaced. As an example, this line is formatted in this style.

- All documents are printed in duplex. Unless otherwise noted, use the first, left, and right page layouts as defined below.

- All chapters, unless otherwise noted, are numbered with the chapter number, a bullet, and the page number such as 2 • 4.

- All chapters should have an even page count for ease of duplex printing.

First Page Layout

The First page layout appears in print as a right page. The text is placed starting at 1.75 inches below the edge of the page and ending at 9.25 inches. The left edge is placed 1 inch to the right of the binding edge and the right edge placed at 6.75 inches.

There is no header, but it uses the Chapter Head style tag containing the chapter name and an extra thick (4 point) line below the text. The line is placed horizontally 2.5 inches below the top margin. Since the Mobil style does not number chapters in print at the top of the first page, the chapter numbers are in white text. An example of this is shown on the first page of this chapter.

First page layout and the Right page layout use the same footer. The Cover Date variable, the publication date is placed left justified, the page number is placed right justified, and a single line positioned across the top of the text. Use the **footer right** paragraph formatting. The page number includes the chapter number, variable **Running H/F 3** along with a bullet and the page number within the chapter. Check the appropriate chapter description section in the Organization chapter for numbering details.

If the document is a draft document, place the word DRAFT centered in the footer. The word draft is included in the template as conditional text which may be hidden for the final print.

Right Page Layout

The Right page text box is placed with the top of the box at 0.75 inches below the top margin and the bottom at 9.25 inches. The left edge of the box is placed 1 inch to the right of the right of the binding edge and the right edge at 6.75 inches.

The Right page layout contains both a header and a footer. The header of the right page has a single line positioned across the top of the page with the most current heading text, **Running H/F 2**, right justified. Use the **header right** paragraph formatting. The header text box is placed with the top of the box at 0.25 inches below the top margin

and the bottom at 0.5 inches. The left edge of the box is placed 1 inch from the binding edge and the right edge 6.75 inches from the binding edge.

First page layout and the Right page layout use the same footer. The Cover Date variable, the publication date, is placed left justified, the page number is placed right justified, and a single line positioned across the top of the text. Use the **footer right** paragraph formatting. The page number includes the chapter number, variable **Running H/F 3** along with a bullet and the page number within the chapter. Check the appropriate chapter description section in the Organization chapter for numbering details.

The right footer text box is placed with the top of the box at 9.5 inches below the top margin and the bottom margin at 9.75. The left edge of the box is placed 1 inch from the binding edge and the right edge 6.75 inches from the binding edge.

If the document is a draft document, place the word DRAFT centered in the footer. The word draft is included in the template as conditional text which may be hidden for the final print.

This page is an example of the Right page layout.

For short, single-sided documents, use the Right page layout for all pages.

Left Page Layout

The Left page text box is placed with the top of the box at 0.75 inches below the top margin and the bottom at 9.25 inches. The left edge of the box is placed 0.75 inch from the binding edge and the right edge 6.5 inches from the binding edge.

The header of the Left page has the single line positioned across the top of the page with the current chapter name, **Running H/F 1**, left justified. Use the **header left** paragraph formatting. The header text box is placed with the top of the box at 0.25 inches below the top margin and the bottom at 0.5 below the top margin. The left edge of the box is placed 0.75 inch from the binding edge and the right edge 6.5 inches from the binding edge.

The left footer text box is placed with the top of the box at 9.5 inches below the top margin and the bottom 9.75 below the top margin. The left edge of the box is placed 0.75 inch from the binding edge and the right edge 6.5 inches from the binding edge.

The Left page footer has the page number left justified, the Cover Title variable right justified, and a single line positioned across the top of the text. Use the **footer left** paragraph formatting. The page number includes the chapter number, variable **Running H/F 3** along with a bullet and the page number within the chapter. Check the appropriate chapter description section in the Organization chapter for numbering details.

The previous page and the next page are examples of the Left page layout.

If the document is a draft document, place the word DRAFT centered in the footer. The word draft is included in the template as conditional text which may be hidden for the final print.

Standard Font

The standard format includes using only three fonts.

- Body text font is 11 point, Times New Roman.

- Heading font is Arial with varying point size depending upon the heading level. Level one, used for main topics, is 18 point, bold font with a thick line above the heading text.
  Level two, used for sub-topics, is 14 point, bold font.
  Level three, used for the level beneath sub-topics, is 12 point, bold font and is indented to match the body text.
  Level four, used for the level beneath level three, is 12 point and is indented to match the body text.

- The key, field, menu, and screen names are presented in Courier New, 11 point.

Headings

There are only three or four headings used per chapter. The section names or general material headings are assigned the first level headings. The specific material headings which fall beneath the first level headings are consecutively assigned lower level headings of two through three.

A sample of the heading levels is displayed in this chapter.

Arial, 11 point, bold

Times New Roman, 11 point

Heading Level	Example(s)
Level One	Main topics: Overview, Style Sheet, and Templates
Level Two	Material specific to Style Sheet, a first level heading: Page Layout, Standard Font, Headings, Tables, Lists, Lists, and Templates
Level Three	Material specific to Lists, a second level heading: Unordered Lists — Bullets and Ordered Lists
Level Four	Headings of information specific to the next level, such as Ordered lists. This chapter does not use the fourth level heading.

Tables

Tables work well for presenting information that can be organized into groups of logical categories. The number and size of columns in a table depend on the information presented. However, the suggestions given below apply to all tables:

- Column headings are 11 point, Arial bold with initial caps and aligned flush left above the appropriate columns.

- Repeat the header row if the table flows to another page.

- Cell body text is the same font as body text, 11 point Times New Roman, and aligned flush left within the column.

- Tables use single line styles for all borders.

The following table is an example of the described table attributes.

Server 4155	Server 2101	Server 7253
2nd floor	5th floor	10th floor
75 users	125 users	30 users
1 gigabyte	2 gigabytes	1 gigabyte

Tables are not labeled or captioned in regular text. Some technical documents require each table to have a caption. When this is required, the caption is placed before the table and, like the table itself, is left justified with the text above it. The style for this is Table Caption.

Captions

All illustrations and figures, referred to in this document as graphics, require captions. Use 11 point, Times New Roman, bold, font for captions. Include the word Figure followed by a colon, the chapter number, en dash, and the figure number within the current chapter. The caption is left justified with the text immediately above the graphic. The caption is autonumbered with the C:Figure<n> \b <n+> < > < > \t formatting. Since graphics and tables may be placed in body text and procedures, there are three style available: Caption, Step Caption, and Table Caption.

Lists

There are two different types of lists which may be used in a document: an ordered list and an unordered list. An ordered, numbered, or procedural step list shows items that must appear in a particular sequence — first, second, third, and so on. An unordered list is one where items in the list are shown in no particular sequence.

Unordered Lists — Bullets

Bullets are used to distinguish items in an unordered list as in the following example.

• Do not use bullets for steps in a procedure. However, you can use bullets for a procedure where the user can choose among several actions.

• Place bullets flush left with text.

• You can single or double space the bulleted items, depending on their length.

• At least two items are required for an unordered list. You cannot have a single bullet by itself.

• Capitalize the first word of each item in the list.

• If each item in the list is a complete sentence, place the appropriate punctuation mark at the end of the sentence. If most of the items in the list are complete sentences, make sure that **all** are complete sentences.

• If none of the items are complete sentences, precede the list with a complete sentence and list each item without punctuation.

For all single level lists, the bullet is the standard small black circle flush left with the text above it by 0.5 inches. For two level lists, the first and second level bullet are still the standard small black circle; however, the second level bullet is flush left with the indented text at 0.75 inches.

Ordered Lists

The format for ordered lists is similar to the format for unordered lists, except numbers are used instead of bullets. Follow the suggestions in the example below to create an ordered list.

1. First-level ordered lists use numbers, followed by a period and a tab.

2. Second-level ordered lists use lowercase letters, followed by a period and indented 0.75 inches from the first level.

3. An unordered, bulleted list can be used for the second level within an ordered list.

At least two items are required for the list. You cannot have a number 1 step without a number 2 step or an a. without b.

Special Instructions

Special instructions are presented in a separate paragraph and identified with all upper case letters. Special instructions include notes, warnings, and callouts. They each serve different purposes.

Notes and Warnings

Capitalized text, such as NOTE and CAUTION, calls attention to significant information, warnings, and cautions. Notes call the reader's attention to particular information while hints provide tips or shortcuts to using the system effectively. Warnings and cautions alert the reader when damage may result from improper action. Cautions usually indicate system damage, while warnings indicate potential harm.

The standard style includes the type of special instruction placed in all capitalized letters followed by a colon and are left justified to match the text directly above the information.

NOTE: This is an example of one type of special instruction.

Since special instructions can be placed in regular text, under bullets and steps, and within table cells, several styles are available within the template. These include Note, Note Cell, Note Step, Warning, Warning Cell, Warning Step, Caution, Caution Cell and Caution Step.

Callouts

Callouts point to specific items or areas in a graphic. Use the following standard for callouts.

- Use 10 point, Times New Roman.

- Use an initial cap for each callout.

- Left justify the text.

The Callout style is also included in the template.

Special Characters

Special characters are those symbols which are universally identified. They include the following:

Em dash	—
Bullet	•
Degree	°
Trademark	™
Copyright	©
Registered trademark	®

Refer to your specific desktop publishing application users' guide or online help for information on how to create these symbols.

Templates

The standard format styles are contained in template files available and located on a shared drive. The directory for the templates is I:\\DAL-S1A\DATA\SHARED\EVERYONE\GIS_DOC\TEMPLATE.

The template file for Word is called STNDTEMP.DOT and is located in the Word sub-directory. The FrameMaker 5 file for Word conversions is TEMPLATE.FM5 and is located in the Frame subdirectory. The template files for FrameMaker are:

- COVER for the cover page template

- TOCTEMP for the table of contents template

- CHAPTEMP for the chapters template

- IXTEMP for the index template

Apply the appropriate template to your document.

Once all templates have been imported, remember to perform the following tasks.

- Set all variables

- Format the document text to use smart spaces

- Set up each file to restart each chapter on the Right page, restart numbering each chapter at one, and continue the paragraph numbering from the previous chapter

Style Characteristics

The tables below list all of the styles in the template and the characteristics of each.

Character Tags

The following table defines the character tag settings.

Style	Use	Font	Point	Details
Bold	Caption label, not actual description text	As Is	As Is	Text appears in bold.
Default ¶ Font	Normal body text	Times New Roman	11	Text appears in the default font.
Names	Key names and field names	Courier New	11	Text appears in Courier New font.
Ref-Text	URL addresses for HTML conversion	As Is	As Is	Text appears in blue and is underlined.
White	Autonumber formatting in chapter number in headings	As is	As Is	Text is inserted in white and not visible on a printed page or screen.

Paragraph Tags

The following table defines the characteristics specific to the paragraph tags. All tags are set at single line spacing unless otherwise noted.

Style	Use	Font	Point	Space Above	Space Below	Numbering	Description
Appx Head	Name of an appendix chapter	Times New Roman	36			**C:<A+>** **< =0>< =0>** **< =0>** positioned at end of paragraph, use **White** character format	Right justified, bold, italic, initial caps, indented 1.0 inch, extra thick (4 point) horizontal line under text, white letters, not visible on page, are used for automatic numbering of chapters and headings, placed 2 inches from top margin and 2.5 inches from edge of paper
Body	Standard body text	Times New Roman	11	8			Left justified, indented 0.50 inches, ragged right, following lines indented 0.5 inches, no hyphenation allowed
Bulleted	Unordered list text	Times New Roman	11	6		**/b/t** (bullet and tab)	Left justified, indented 0.5 inches, following lines indented 0.75 inches, tab set at 0.75 inches
Callout	Text used to point to specific information in a graphic	Times New Roman	10				Left justified over line pointing to graphic area

Style	Use	Font	Point	Space Above	Space Below	Numbering	Description
Caption	Title of a graphic	Times New Roman	11	6		**C: Figure\<n>** **\b \<n+>** **\< >\< >** \t with **Bold** character format	Left justified, bold, indented 0.5 inches, following lines indented 1.45 inches, right indent set at 1.0 inch, tab set at 1.45 inches right
Caution	Capitalized text indicating possible system damage	Times New Roman	11	4		**CAUTION:** \t with **Bold** character format	Left justified, text indented 0.5 inches, following lines indented 1.3 inches, tab set at 1.3 inches
Caution Cell	Capitalized text within a table indicating possible system damage	Times New Roman	11	1		**CAUTION:** \t with **Bold** character format	Left justified, following lines indented at 0.81 inches, tab set at 0.81 inches
Caution Step	Capitalized text within a procedure indicating possible system damage	Times New Roman	11	6		**CAUTION:** \t with **Bold** character format	Left justified, indented 0.75 inches, following lines indented 1.56 inches, tab set at 0.75 inches
Cell Body	Body cells in a table	Times New Roman	11				Left justified within the cell, initial caps
Cell Heading	Heading row in a table	Arial	11				Left justified within the cell, bold

Style	Use	Font	Point	Space Above	Space Below	Numbering	Description
Chapter Head	Name of a chapter	Times New Roman	36			**C: <n+>< =0> < =0>< =0>** use, **White** character format, positioned at end of paragraph	Right justified, bold, italic, initial caps, indented 1.0 inch, extra thick (4 point) horizontal line under text, white letters, not visible on page are used for automatic numbering of chapters and headings, set 2.0 inches from margin and 2.5 inches from edge of paper
Company Name	Name of company placed at bottom of front cover	Arial	14	100			Right justified, bold, placed touching the bottom margin
Confidentiality	Heading for Confidentiality Statement placed on back of title page	Times New Roman	14	360		Confidentiality Statement with **Bold** character format	Left justified, bold, thick (3 point) horizontal line above the words Confidentiality Statement
Cover Date	Printed date of document	Arial	14	100			Right justified, bold
Cover Title	Document title on front cover	Times New Roman	32				Right justified, bold, italic, extra thick (4 point) horizontal line below text, text placed at 4.5 inches below top margin

Style	Use	Font	Point	Space Above	Space Below	Numbering	Description
Heading 1	First level heading	Arial	18	23		**C:<n+>** use **White** character format and place at end of paragraph	Left justified, bold, thick (3 point) horizontal line above the text
Heading 1nl	First level heading, used directly below chapter heading	Arial	18	23			Left justified, bold, no line above text since only placed above the chapter heading
Heading 2	Second level heading	Arial	14	18			Left justified, bold
Heading 3	Third level heading	Arial	14	18			Left justified, bold, indented 0.5 inches, following lines indented 0.5 inches
Heading 4	Fourth level heading	Arial	12	18	2		Left justified, indented 0.5 inches, following lines indented 0.5 inches
Normal	Standard Body text	Times New Roman	11	8			Left justified, indented 0.5 inches, ragged right, following lines indented 0.5 inches, no hyphenation allowed
Note	Capitalized text highlighting important information	Times New Roman	11	6		**NOTE: \t** with **Bold** character format	Left justified, indented 0.5 inches, following lines indented 1.1 inches, tab set at 1.1 inches, right indent set at 1.0 inch

Style	Use	Font	Point	Space Above	Space Below	Numbering	Description
Note Step	Capitalized text within a procedure highlighting important information	Times New Roman	11	6		**NOTE: \t** with **Bold** character format	Left justified, following lines indented 0.6 inches, tab set at 0.6 inches
Note Cell	Capitalized text within a table highlighting important information	Times New Roman	11	1		**NOTE: \t** with **Bold** character format	Left justified, indented 0.75 inches, following lines indented 0.5 inches, tab set at 0.5 inches
Step 1	Firsts step in a procedure	Times New Roman	11	6		**S:<n=1>. \t**	Left justified, indented 0.5 inches, following lines indented 0.75 inches, tab set at 0.75 inches
Step Body	Text included as part of the procedure, but not numbered	Times New Roman	11	6			Left justified, indented 0.75, following lines indented 0.75
Step Body Bullet	Unordered list text placed within a step	Times New Roman	11	4		**/b/t**	Left justified, indented 0.75, following lines indented 1.0 inch, tab set at 1.0 inch
Step Caption	Caption used to label a graphic placed within a procedure	Times New Roman	11	6		**C:Figure<n> < > \b <n+>< > \t** with **Bold** character format	Left justified, indented 1.0 inch, following lines indented 1.85 inches, tab set at 1.85 inches, right indent set at 0.5 inches

Style	Use	Font	Point	Space Above	Space Below	Numbering	Description
Step n	Step following the first step in a procedure	Times New Roman	11	6		**S:<n+>. \t**	Left justified, indented 0.5 inches, following lines indented 0.75 inches, tab set at 0.75 inches
Table Caption	Caption used to label a table	Times New Roman	11	6		**C:Table <n>< >< > \b <n+> \t** with **Bold** character format	Left justified, indented 0.5 inches, following lines indented 1.45 inches, right indented 1 inch, tab set at 1.28 inches
Warning	Capitalized text indicating potential harm	Times New Roman	11	6		**WARNING: \t** with **Bold** character format	Left justified, indented 0.5 inches, following lines indented 1.4 inches, tab set at 1.4 inches, right indent set at 0.75 inches
Warning Cell	Capitalized text within a table indicating potential harm	Times New Roman	11	1		**WARNING: \t** with **Bold** character format	Left justified, following lines indented 0.85 inches, tab set at 0.85 inches
Warning Step	Capitalized text within a procedure indicating potential harm	Times New Roman	11	6		**WARNING: \t** with **Bold** character format	Left justified, indented 0.75 inches, following lines indented 1.6 inches, tab set at 1.6 inches, right indent set at 1 inch

The following table defines the header and footer paragraph tags.

Style	Use	Font	Point	Space Above	Space Below		Description
header left	Header formatting for the Left page layout	Arial	9	3			Left justified, single (1 point) horizontal line below text
footer left	Footer formatting for the Left page layout	Arial	9				Left justified, single (1 point) horizontal line above text, tab set at 5.75 inches right, conditional text **Draft** tab centered at 2.5 inches
header right	Header formatting for the Right page layout	Arial	9	3			Right justified, single (1 point) horizontal line below text
footer right	Footer formatting for the Right page layout	Arial	9				Right justified, single (1 point) horizontal line above text, tab set at 5.75 inches right, conditional text **Draft** tab centered at 2.5 inches

Variable Tags

The following table defines the variable settings used in the headers and footers.

Style Name	Definition	Use
Cover Date	Date document is published	Manually entered and used on cover page and in footer of the Right and First page layouts
Cover Title	Title of document as on cover page	Manually entered and placed in bottom right footer of Left page layout

Style Name	Definition	Use
Current Page #	<$pagenum>	Used within other variable tags
Running H/F 1	<$paratext[Chapter Head]>	Places name of current chapter at the top left of the Left page layout
Running H/F 2	<$paratext[Heading 1, Heading 1nl, Heading 2, Heading 3]>	Places name of the most current heading at the top right of the Right page layout
Running H/F 3	<$paranumonly[Chapter Head, Appx Head, Heading 1]>	Places the chapter number in the bottom of left and right page layout and is placed with a bullet and variable Current Page #

Graphics

Overview

Graphics are the emphasis tools used to give strength to important points, logically divide topics, call attention to specific steps and make your document more user friendly. This chapter provides general guidelines for formatting and placing graphics and includes the guidelines on the uses of Mobil graphics within documentation.

General Graphics

Use the following guidelines when placing graphics or screen shots in your manual.

- Use appropriate artwork, graphics, and screens to illustrate your manual.

- If you are creating your document from scratch, use Tagged Image File Format (TIF) or Joint Photographic Experts Group (JPG) graphic file formats.

- Full-sized Windows screen shots need to be 4.5 x 3.5 inches. See example on the next page.

- For non-Windows screen shots, use a rounded box approximately the same width as the Windows screen shots as shown in the example below.

```
                     ┌─────────────── Main Menu ───────────────┐
                     └──────────────────────────────────────────┘

   ┌──────────────────────────────────────────────────┐
   │ 1. Select one task                                │
   │ 2. Select two task                                │
   │ 3. Select three task                              │
   │                                                    │
   │                                                    │
   └──────────────────────────────────────────────────┘
```
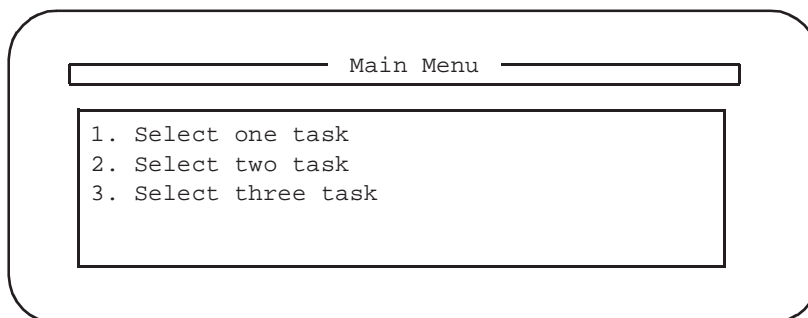
Figure 4 – 1   Sample Mainframe Screen

- Dialog boxes and message boxes should be 75 percent or less of the original size when initially imported. Retain the same proportions. Large dialog boxes can be reduced even more when needed.

- All illustrations need a caption. Illustrations are numbered with the chapter number and illustration number. No explanatory sentences should be placed with the caption.

- Graphics should be left justified with the text immediately above, as shown below.

Figure 4 – 2   Publishing a New Document in Know How

Preview all graphics including illustrations, screen shots, and graphic depictions of navigational buttons or icons to ensure clarity.

Mobil Graphics

A Mobil documentation style guide would not be complete without corporate rules for using the Mobil trademark and other Mobil graphics. These rules provide guidelines for graphics coordinators and company personnel about the correct and consistent use of Mobil graphics. This ensures that the Mobil products and services are portrayed in a readily recognizable image. That image is important to a business enterprise characterizing itself as profitable, progressive, and environmentally sensitive. This chapter includes the portions of the corporate identity rules that apply particularly to documentation.

Mobil Corporate Identity

Every established corporation has an identity that exists in the minds of the public. This identity is influenced by all activities of that corporation. Therefore, it is important for the corporation to project an image consistent with its goals and objectives. The Mobil objective is to characterize its companies as progressive, well-managed, profit oriented growth companies that are known throughout the world for the quality of their personnel, products, and services.

To accomplish this objective, Corporate has developed appropriate design expressions for everything which identifies Mobil companies. The focus for technical writing is the appropriate use of the corporate identity standards in printed materials and visual presentations.

Mobil Trademark

The word Mobil$^{®}$ is the official trademark of Mobil Corporation. Its effectiveness depends on proper and consistent application wherever used. The proportions, style, spacing and color of the trademark cannot be changed in any way. Unless otherwise required by law, the major identification should be the trademark Mobil$^{®}$ rather than the full corporate name.

The symbol ® means that the Mobil trademark is protected by registration in the United States Patent and Trademark Office. The mark, ®, should appear with the trademark to indicate that it is a registered trademark.

The Pegasus, the flying red horse, while not an official trademark any longer, is certainly identifiable with Mobil Corporation and is used a great deal. The standards for its use are very restricted. The symbol should not appear in black and white; therefore, it should only appear in color presentations and color hard copy. Also, the angle must be correct, and it can never be turned to face the opposite way. The sample below although incorrectly displayed in black and white, presents the correct presentation and angle for the Pegasus.

Figure 4 – 3   Mobil Pegasus

The Pegasus symbol and the Mobil trademark are always separated. A good presentation of both within one document is to place the Pegasus symbol on the back cover and the Mobil trademark on the front cover. Use the trademark at moderate size. Avoid the addition of other marks or type around either trademark.

Description

The Mobil trademark utilizes special letter shapes, spacing and colors. The shapes of the letters have been specially designed and are unique to Mobil Corporation and its affiliates. Mobil Blue is used for all letters except the *o* which is Mobil Red. The colors Mobil Red and Mobil Blue (sometimes referred to as Mobil Century Red and Mobil Century Blue) were developed especially for use on a white or light neutral colored background, where they have maximum impact.

Positioning the Trademark

The Mobil trademark should have a generous amount of background space surrounding it, in order to set it off. For this same reason, the Mobil trademark should never be confused by additional design elements such as border decorations, ornamentation, distracting blocks of color or industry slogans.

Identification is best achieved by having the Mobil trademark appear once on the cover page of a document. Do not scatter a number of Mobil trademarks on the page.

Mobil Alphabet

Like the Mobil trademark and the Pegasus symbol, the Mobil alphabet is an integral part of the corporate identity. The letters in this alphabet have been specially designed as an extension of the trademark. No other typeface, no matter how similar, may be substituted for the Mobil alphabet. It can only be used by Mobil Corporation, its affiliates and subsidiaries.

Practices

Overview

The most commonly used technical writing conventions and styles appear in this chapter. If you need more information about a particular topic, the References chapter lists several good books and dictionaries that can provide additional information on writing and style issues.

Conventions

Key names, commands, and other systems-related terminology must be presented consistently throughout your document. You can ensure that these items are presented consistently by using conventions. Conventions are generally accepted ways of presenting information and enable the reader to grasp the material more quickly. The basic conventions specific to written documentation are described in the following sections.

Names

Naming conventions define the way key, field, menu, and screen names are identified within text. In the following sections, these conventions are defined.

Key Names

Use 11 point Courier New to represent keyboard key names for instruction. Place the key name in uppercase letters surrounded by brackets.

Example: Press [ENTER].

When it is necessary to hold down one key while pressing another, couple the keys by using the plus character, (+), and using key names only.

Example: Press [CTRL+N] to display the Notice dialog box.

Field Names

Use 11 point Courier New to represent all field names, button names, menu options, and list box items. Spell all names as they appear on the screen.

Example: Press [TAB] to move the cursor to the NUMBER field.

Select Save As under the File menu.

Menu and Screen Names

No special font is used to represent the name of a menu or screen in the text. Type the name exactly as it appears in initial caps.

Example: Press [ENTER] to display the Main Menu.

The User Information screen appears.

Instructions to the Reader

Use the word press when referring to function keys. The word press usually indicates one keystroke. Use the word type for entering characters from the keyboard. Type can indicate multiple keystrokes.

Example: Type *your name* and press [ENTER].

Use bold text to highlight words to be typed verbatim. Show in italic non-specific words that the user should type when the words are variable text, to be replaced with something else.

Example: Type **run** and press [ENTER].

Type your *password*.

System Messages

When a system message appears in the text, type the text of the message in 11 point Courier New. Use wording and punctuation exactly as the message appears on the screen. Quotation marks are not used unless they appear as part of the message.

Example: The system displays the message File not found.

Navigation Methods

In the text, do not define the type of menu with an adjective, such as calling the menus at the top of the window pull-down menus, unless you must emphasize the way the menu works as a feature of the product. However, do use the spelling exactly as it appears on the screen.

Example: Select `Run` from the File menu.

When the user needs to select an option with the mouse, use the term `click`.

Example: Click the `Month` option, and then click `OK`.

Style

The style of a book is determined by its voice, its punctuation standards, and the way supplement material is handled. This section provides style guidelines. For any style not provided herein,

Voice and Person

Voice and person set the tone of your document. A friendly, confident, matter of fact tone creates rapport with your reader and contributes to the success of your document. The following tips can help you set an appropriate tone for your manual.

Speak directly to the reader using the second person *you*. This personalizes the manual and involves the reader in the activities.

Incorrect: The user must type his/her password.

Correct: Type your password.

Use active voice, not passive voice. Active voice is direct and clarifies the performer of the action. When active voice is used, the subject of the sentence performs the action of the sentence.

Incorrect: Reports on system usage are presented by Vantage.

Correct: Vantage provides reports on system usage.

Write in the present tense when writing instructions.

Incorrect: Then, you will type your password and the Main Menu will appear.

Correct: When you type your password, the Main Menu appears.

Cast statements in positive terms, which are much easier to understand than negative statements.

Incorrect: Do not leave for the day without logging off the network and turning off your PC.

Correct: Log off the network before turning off your PC.

Capitalization

Capital letters are often overused in technical writing. Too much uppercase text clutters the page and distracts the reader. Follow these guidelines for using uppercase.

Capitalize proper nouns such as names of individuals, places, companies, and products.

Example: Tom Watson
Dallas, Texas
Mobil Exploration and Producing Services, Inc.

Use lowercase for job titles, unless followed by a name, also, use lowercase for generic systems and software modules unless the name is a specific system or a specific module in a particular system.

Example: This report is distributed to the president and his staff.
President Bush announced the new energy policies.
The database system provides data storage.
The Surface Analysis System maintains analysis data.

Capitalize the first word in each item of ordered and unordered lists.

Example: The following types of data are available.
• Monthly operating reports
• Quarterly production reports
• Annual production reports

Capitalize the first word and all key words of each item in a table.

Punctuation

The purpose of punctuation is to make your document easier to read and understand.

Commas

Use a comma after an introductory word or phrase.

Example: After you log on to the system, review the Main Menu.

Use a comma between two independent clauses joined by a conjunction (and, but, nor, or, for, so, yet).

Example: The system message disappears and the Entry Screen displays.

Use a comma to separate items in a series. Include a comma after the next to last item in a series.

> Example: The screen shows assignment number, client name, and client address.

Use a comma to separate nonessential clauses and phrases from the rest of the sentence.

> Example: The system, designed for non-technical users, lets you generate meaningful reports.

Quotation Marks

Do not use inch marks (") for quote and apostrophe marks. Use the appropriate angled marks (" ") provided by the desktop publishing application you are using. Check your application's users' guide.

Commas and periods always go inside quotation marks.

> Example: If this data came from "Subsection 2," please rerun the program.

Semicolons and colons always go outside quotation marks.

> Example: The application renames these "ghost files": TESTFILE.CFG, DRAWFILE.CFG, and CUTFILE.CFG.

Question marks go inside or outside, depending on the meaning.

> Example: Did you type in the "spec date"?
>
> You may ask, "Will this really work?"

Semicolons

Use a semicolon to take the place of a missing conjunction.

> Example: The file is saved; the Main Menu appears.

Use a semicolon before connective adverbs used as conjunctions: however, consequently, therefore, thus.

> Example: The system processes data quickly; however, the output has limited use.

Use a semicolon instead of a comma to separate items in a series when the items already have internal commas.

> Example: You may use GemCap, a screen capture program; GemDraw, a graphics program; or Lotus1-2-3, an accounting package.

Colons

Use a colon before a series of items within a sentence.

Example: For more information, see the following files: TESTFILE.CFG, DRAWFILE.CFG, and CUTFILE.CFG.

Use a colon as a conjunction when the second clause amplifies the first.

Example: We maintain our position: the results are worth the risk.

If bullets are used, use a complete sentence preceding the bulleted items.

Example: The following reports are available for printing.

- Dailey activity reports
- Weekly status reports
- Monthly operating reports
- Quarterly production reports
- Annual production reports

Dashes

Use em dashes to set-off parenthetical material — information not essential to the sentence.

Example: The outcome of the analysis — as we expected — justified the expense.

Use an em dash instead of a comma, but not both together.

Example: Well # 614, according to estimated future net revenue, is not as productive as well # 702.

Well # 614 — according to estimated future net revenue — is not as productive as well # 702.

Measurements

Abbreviations for measurements (ft, in., oz, MB, GB, K) usually appear only in tabular data. Spell out measurements in text when the number is from zero to nine.

Example: The well was 250 feet deep.
The server needs a two gigabyte drive

Acronyms and Abbreviations

Acronyms and abbreviations are necessary in most technical documents. However, when using acronyms or abbreviations, make sure they are used consistently and are easily understood. Follow these guidelines.

The first time you use an acronym in a manual and the first time in each chapter, spell out the words and put the acronym in parentheses.

> Example: Full Scale Seismic Section Index (FSS)

Type acronyms in uppercase unless trademarks require otherwise.

> Example: MEPUS, GemCap

To make an acronym plural, add a small *s* without an apostrophe.

> Example: OEMs, PCs

Spell out the three phrases listed below instead of using abbreviations. Like the formatting of measurements, spell out phrases in running text and save the abbreviations for parenthetical references such as "Some groupware packages (e.g. Lotus Notes) are extremely useful to large projects."

For this...	Use this...
e.g.	for example
i.e.	that is
etc.	and so forth

Numbers

Spell out numbers in the following situations.

Standard	Example
Zero to nine, when used in text	The Main Menu has three options.
Compound numbers, when used in text.	We have completed two-thirds of the project.
Any number used at the beginning of a sentence	Three people were present.

Use numerals in the following situations.

Standard	Example
Data to be entered in a field.	Type **2** and press [ENTER].
Dates, measurements, weights, distance, and times	June 16, 5 feet, 9 pounds, 40 miles, 8:30 a. m.
Decimas and fractions	8.5, 6.9876
Page numbers	Page 2 • 1

Insert a comma in numbers with four or more digits except program line numbers.

Example: 35,468

Use the word *to* or a hyphen to show continuous numbers. Always use *to* when the numbers are preceded with *from*.

Example: 6 – 16 feet
from 6 to 16 feet

Use the measurement or percent sign only once when typing continuous numbers.

Example: 25 – 30%
50 to 60 feet

When typing dates, use endings such as *st* (1st) and *rd* (third) only when the day is used without the month.

Example: We must meet again on January 1.
Statistics are due by the 15th.

Break the rules when necessary for consistency.

Example: 1 to 10

Do not state a number twice in a sentence, in both words and numerals, as is done in legal documents.

Example: There are five production gateways in the system.

References

In a document, refer to outside publications or other chapters of your document using the following guidelines.

The first time you refer to a publication or program, use the complete name followed by any acronym or abbreviation in parentheses.

Example: Mobil Surface Analysis System (MSAS) Reference Manual

Type publication titles in italics.

Example: *American Heritage Dictionary*

Use consistent wording when instructing the reader to see another chapter.

Example: For more information on documentation standards, see the Practices
             chapter.

Use consistent wording when referring to another section in the chapter.

Example: See the Usage section for more information on comma usage.

Dates

Spell out dates to prevent confusion. While Americans view 8/9/94 as August 9, 1994,
Europeans view 8/9/94 as September 8, 1994.

Example: The clerk updated the file on August 2, 1996.

Review

Overview

This chapter provides a writing process list, a list of things to check for when performing the final edit of a document, and a checklist for the review process. Once the writer and editor have reviewed the document, it must be reviewed by the client or Subject Matter Expert.

Review Process

Documents must be subject to several levels of review as discussed in the following sections.

Writer Review and Peer Edit

Review your document throughout the writing process. Continue to look at grammar, punctuation, style, adherence to standards, coherence, organization, accuracy, and consistency. Examine the document closely to ensure it accurately and fully describes the subject. If you have a peer writer available, request the document be proofread and edited. This type of review is very helpful, so take advantage of it whenever someone is available to do this task.

Client and User Review

Subject matter experts (SMEs) and the client must also review the document. SMEs are the people who worked on the system: developers, programmers, designers, and managers. They can provide invaluable feedback. If the document is a sizable manual and their schedules very tight, these people may not review the entire manual. Give each of them a complete copy, with a cover review memo or review form, providing pointers to the sections they are responsible for reviewing. After reviewing the project

schedule, set a date when the document needs to be returned. Send out a reminder to those reviewers who fail to return their copies. Tell them their comments are valuable, even if they simply validate the documentation. Also tell them that the document will be published without their contribution by a certain date.

When all marked up copies have been returned, research all the changes. Resolve differences that may arise from reviewers' comments and make any necessary changes to the document. If possible, have a peer proofread it again when you have completed all the changes.

If the system being documented is not finalized yet and you are still receiving changes and new information, a second review may be necessary. This second review should be more limited and copies distributed to just those responsible for changes. Remember, the shorter the review list, the better the consensus among reviewers, the less time it takes for the review, and the faster you can make the revisions and get the document published.

Review Cover Document

When sending a copy of your document to reviewers, attach a cover document. Your cover review document can take one of two formats, each addressing special needs: the Review Form with standard reviewer instructions, shown on page 6 - 2, and the structured Review Memo with fields for project-defined instruction, shown on page 6 - 5. These review request formats are explained and examples provided later in this chapter.

The client review is the most important review. Practical application of the document by actual users of the system helps not only the writer but also the developers. This type of review provides insight into the system and how the documentation is used. Sometimes the user review can have such an impact that the system is revamped and the documentation enlarged or downsized significantly. Just be aware that a client review can bring about unexpected results and opinions.

Review Form

The Review Form provides a format with fields to be completed: document name, due date, and reviewers' names. The space at the bottom (which can flow onto the backside) is for the writer's notes about the documentation. It can contain directions for reviewers, answer remaining questions about the material, or point out special material to review, and so forth. This form works well if there is a large group of diversified reviewers. Because it is more formal than the review memo, it works well with reviewers that need an extra push to review the document thoroughly and return copies on time.

This document, REV_FORM.DOT, is located in the template subdirectory, I:\\DAL-S1A\DATA\SHARED\EVERYONE\GIS_DOC\TEMPLATE, as an MS Word file.

Review Request
[Name of Document]

Date Sent:	**[Current Date]**	Please Return By:	**[Date]**
Return To:	**[Writer's Name]**	Phone:	**[Telephone Ext. and BM #]**

Reviewers

[Name]	[Name]
[Name]	[Name - FYI]

Reviewers with *FYI* by their names are not required to review the attached document, but are encouraged to provide comments, if possible. **[Do not use this statement if there are no FYI reviewers.]**

Sign Here

Please place a check on the appropriate line, sign this form, and return it with the reviewed document. Feel free to place remarks on the document. Turn this sheet over and write additional comments, if needed. Thank you for your help.

The attached documentation

__ Is acceptable as is.

__ Needs the changes marked.

__ Was not reviewed.

Reviewer's Signature _____

Date _____

Please Note

[This space for writer's requests, such as asking reviewers to look at particular areas of the document, or other information to reviewers such as telling them to disregard incomplete sections, to be aware that the document is only one piece or chapter, that it has already been reviewed by named others, and anything that is pertinent to the review.]

Thanks for your help!

Review Memo

The review memo resembles the format of interoffice correspondence, and in fact, those words appear as its title. It gives reviewers a list of review objectives. The Review Memo works well for novice reviewers, people who normally do not review documentation, or people who are experienced reviewers but are not familiar with documentation produced by your group. You fill in the document name, due date, and reviewers' names. In the body of the memo, include notes about the documentation and instruction for reviewers.

This document, REV_MEMO.DOT, is located in the template subdirectory, I:\\DAL-S1A\DATA\SHARED\EVERYONE\GIS_DOC\TEMPLATE, as an MS Word file.

INTEROFFICE CORRESPONDENCE
Documentation Review Request

Date: **[Current Date]**

To: **[Name]**   **[Name]**
          [Name]   **[Name]**
          [Name]   **[Name]**

[Name of document]

User reviews of documentation ensure that the document fits the needs of the intended users. Please help us with this by reviewing the attached document for accuracy, completeness, and organization. Mark any changes, corrections, additions, deletions, or other comments on this copy of the document. After reviewing and marking the document, complete the release below. Then, return this memo and the document with your comments to me by **[Due Date]**.

As you are reviewing the document, please keep the following questions in mind.

- Does the document contain all the information you need to explore the parts of the system with which you are not familiar?

- Does the document correctly describe the way the system works including menus, screens which appear, and keys to press?

- Are the screen examples accurate?

- Is the document easy to read, understand, and use? If not, what needs to be done to make the document better?

Thanks for your help.

[Writer's Name]
[Writer's Location]
[Writer's BM Telephone Number]

Response

This documentation

__ Is acceptable as is.

__ Needs the changes marked.

__ Was not reviewed.

Reviewer's Signature _____ Date _____

Writer's Checklist

The document checklist contains those items which must be reviewed prior to the document being sent to the editor or sent to the client for review.

- Proofread the entire document, page by page, conducting your own critique and review, looking for all errors. Make sure it follows the standard format.

- Make an effort to get all questions answered. If disagreements exist among Subject Matter Experts (SMEs), call these out in the review memo and request input.

- Thoroughly edit the document on all levels. This includes organization, grammar, consistent word treatment, correct punctuation, and proper word choices.

- Pay particular attention to headers, footers, format, section headings, figure numbers and captions, and procedure step numbers. Generate the table of contents and examine it thoroughly. This is an excellent guide to finding redundant sections, poor organization, page number errors, and missing data.

- Ensure the audience and purpose of the document are accurately identified and maintained during the writing process.

- Generate the index and check cross references to make sure they refer to the correct place.

- Look at table data and all graphics objectively as possible to see if they make sense.

- As a last step, run a spell checker on each text file. Your edit is no substitute for this. Afterwards, check each page to see if the corrections made pages break incorrectly or made other unwanted changes.

- With the time allowed and deadlines in mind, make your document as complete and error free as you can make it.

- Place the word *DRAFT* on the cover page and place centered in the footer of each page.

- Check your document for necessary blank pages; all chapters should have an even page count for printing duplex pages.

- Ask project manager, programmer, or SMEs to check reviewer list. Add names as necessary.

- When review copies are received, review one last time before publishing or forwarding to the person who will convert to the final product.

- Archive the document electronic files. Keep a file of notes on the project and a log of when materials were received, when draft out to review, as well as other pertinent information.

- Later, when reviewers' comments are inserted, save their signed forms with their marked-up review copies for at least six months AFTER the finished document is distributed. This way if anyone has objections to something in the document, all

reviewer comments can be searched. After six months, retain the signed sheets and throw away the marked-up drafts.

This document, WRITERCK.DOT, is located in the template subdirectory, I:\\DAL-S1A\DATA\SHARED\EVERYONE\GIS_DOC\TEMPLATE, as a MS Word file.

Editor's Checklist

The document checklist contains those items which are usually reviewed by the editor. If no editor is available, add this list to the writer's checklist.

Acronyms — Check that uncommon acronyms are written out in full the first time they appear in the document and the first time within each chapter, as needed, and appear consistently throughout.

Bulleted Lists — Check for correct indentation and consistent bullet size both within and between lists.

File Names, Path Names, Operator Entries — Check for consistent use of fonts and that standards are applied correctly.

Headers and Footers — Make sure document name, chapter names, and heading text in headers and footers are correct.

Headings — Check for proper and consistent capitalization. Also check for consistent phrasing of headings.

Index — Check accuracy of all references by verifying the applicable references within the manual.

Key Names — Check for consistent use of font and abbreviations.

Measurements — Make sure units of measurement are used consistently and spelled out in the document.

Numbered Lists — Check for correct numbering sequence; look for repeated, missing, or out of order numbers.

Page Numbers — Make sure pages are in the correct order and the page numbers are all preceded by the chapter number and bullet.

References — Check for consistency of font and phrasing when referring to other publications and other parts of the document. Check that reference to local pages, figures, and tables, and other chapter files are correct.

Spelling — Run your electronic spell checker AND check manually since neither method is accurate enough by itself.

Symbols — Make sure symbols, such as bullets, are used consistently.

Table of Contents — Make sure headings reference the correct page number in the document. Review table of contents to ensure heading level placements are accurate and that there are at least two of each level within a chapter.

Word Choice — Make sure wording of instructions is consistent and uses active voice.

This document, EDITORCK.DOT, is located in the template subdirectory, I:\\DAL-S1A\DATA\SHARED\EVERYONE\GIS_DOC\TEMPLATE, as an MS Word file.

Production

Overview

Each document is different. It may be a large manual with many chapters or a small report or quick reference card. Whatever the format, the logistics are the same for producing printed documentation: format of text, size, paper type and color, single- or double-sided, binding, cover, and spine. This chapter provides guidelines and helpful suggestions to the writer handling the document production, printing, and distribution.

Reprographics Preparation

The ReproGraphics Department has a form, ReproGraphic Order, that you are required to fill out when you request their printing services. See the example of the form below. This form asks for the following information.

- Job cost number

- Your name, department, location, and telephone extension number

- Date submitted for printing and date you need the printed documents returned

- Total number of pages submitted and the number of copies needed

- All printing information including color or black and white printing and duplex or single sided

- Hole punch and binding information

In addition, you need to provide any additional instructions needed for the print job.

- Cover and back type and spine, if needed

- Number of tabs needed and the text to go on each

- Camera-ready copy, the electronic file names and their location on the central server, or the names of files you are sending to their print queue

- Paper requirements for the title page and subsequent pages
- Miscellaneous requests such as providing a sample print before full print of the entire job

If this is a rush job and printing is needed immediately, you must indicate whether or not you are willing to pay for overtime.

REPROGRAPHIC ORDER

M-246
(2/95)

JOB NUMBER

ALLOW AS MUCH TIME AS POSSIBLE

DEPARTMENT		DATE SUBMITTED	
NAME (Please Print)		DATE REQUIRED	HOUR
LOCATION — ROOM NO.	EXTENSION	NO. OF ORIGINALS	NO. OF COPIES EACH

XEROX			
☐ B/W COPIES	☐ 1-SIDED	☐ **PUNCH**	☐ **BIND**
☐ B/W TRANSPARENCIES	☐ 2-SIDED	☐ 3-HOLE	☐ 3-RING
☐ COLOR LASER COPIES	☐ COLLATE	☐ GBC 19-HOLE	☐ ACCO FASTENER
☐ COLOR LASER	☐ STAPLE	☐ PER EXAMPLE	☐ GBD 19-HOLE
TRANSPARENCIES	☐ PAD		☐ TAPE

DIAZO		ENGINEERING ZEROX	
☐ BLACKLINE	☐ SEPIA	☐ PAPER	REDUCE / ENLARGE TO:
☐ FOLDED BLACKLINE	☐ MYLAR	☐ 1-SIDED	_____ % OF ORIGINAL

PHOTOGRAPHIC		
☐ **BLACK & WHITE**	☐ **COLOR**	
☐ CLEAR FILM	☐ PRINT	REDUCE / ENLARGE TO:
☐ MATTE FILM	☐ MATTE	
☐ PHOTO PRINT	☐ GLOSSY	_____ % OF ORIGINAL
☐ MATTE ☐ GLOSSY	☐ TRANSPARENCY	☐ B/W COPIES

INSTRUCTIONS

OVERTIME AUTHORIZATION (LIST "A, B, or C" ONLY)	SUBMITTER'S SIGNATURE

Printing

When looking at your project schedule, be sure to allow one week for printing. This is the standard time frame that ReproGraphics requests when you give them a job. They can possibly complete it in less time, but this depends on their workload. If you know ahead of time that you will need a job done quickly, talk to them about it as soon as you can so they can plan accordingly. The printed materials will be delivered to you when complete.

You can provide ReproGraphics with camera-ready 600 dpi hard copy or you can copy your files to a server where ReproGraphics can download them to run on the their printer. This printer, at 1250 dpi resolution, produces very sharp copies. Some documents may be printed directly to their printer. Call first to check with them to see if you can send files to their printer.

You need to look at a printed test copy to make sure all pages are correct, including precisely aligned headers and footers, properly oriented right-hand and left-hand pages, correct tabs, good print quality, and so forth. ReproGraphics will call you to come check out a printed copy if you send a file to the printer. If you give them a master, they will not call you. They assume it is correct.

Think ahead when requesting the number of copies you need of your publication. Besides your users' copies, an archive copy, and a copy for yourself, you may need some FYI copies and a few to store for future users.

If special supplies are needed, such as mylar tabs, special covers or backs, full off-set printing, or some color jobs, allow at least two weeks for the printing process.

Cover

The cover is simply the top cover of the manuscript. The standard cover is a clear cover. The title page should be printed on card stock Mobil stationery with the Mobil trademark in the top left corner. If your documentation project requires a different presentation, ReproGraphics has several covers to choose from. One uses a tan cover stock for GBC- and tape-bound books (see binding below) with the Mobil logo in the upper left and the manual title, affiliate name, and date in the middle under a horizontal black line. Another is white with the same text.

Binding

Documents may be bound in a number of different ways. Three ways are discussed here.

Your document may be placed in a three-ring binder. For a binder, you will need a *slip cover* (to go under the clear plastic on the front of the binder) and a *spine* (to go under the clear plastic on the spine). The slip cover should be a copy of only the front of the

title page printed on the card stock Mobil stationery. The spine is also printed on card stock with the Mobil trademark. ReproGraphics will print these for you. Be sure and verify that ReproGraphics has ample supply of three-ring binders on hand. If more are needed, give yourself at least two weeks to order and receive additional binders. If you need disk holders for your three-ring binders, allow at least two weeks to order and receive the holders.

If you request the document to be *perfect* bound, Mobil uses an equivalent process called tape binding. This method requires the pages to be held together tightly and glue spread down the spine. Then a paper tape or spine is glued onto this and wrapped over a half inch or so on both front and back. There is an upper and lower page limit on tape binding.

Reprographics can also bind manuals with a GBC plastic comb. Since this is a labor-intensive method, it costs extra but is still relatively inexpensive. This type of binding works well for all book sizes, plus it lets a manual lie flat or be turned backward for ease of use. Tape binding does not allow a book to lie flat.

Distribution

Depending on the publication, distribution may be handled by the writer or by the project team. If the team elects to handle distribution, offer to help write a cover memo. If you distribute the copies, write a memo signed by you or by the project team leader. In the memo, list all the recipients and their locations.

Most publications can be sent out by interoffice mail. Occasionally you may need to use regular mail. Do not send publications by express mail unless the project team requests this and agrees to pay the charges.

Maintenance

Overview

Documentation must be maintained in order for it to continue to assist users, support personnel maintenance programmers. To ensure this continued efficiency of documentation, several factors must be reviewed periodically.

Maintenance Considerations

Review documents on a regular basis to ensure the following statements are true for each document.

- Does the document meet the business needs of the user by providing:

    - Complete information on installing the hardware and software

    - Complete information on preparing of the hardware and software

    - Explicit information on using the application and associated hardware

    - Detail information on analyzing and reporting data

    - Troubleshooting techniques for technical level personnel (in-depth techniques and information to perform more comprehensive technical and troubleshooting procedures)

    - Troubleshooting techniques for user level personnel (rudimentary troubleshooting of application errors)

    - Maintenance and service information

    - Current documentation of the current version of the documented system

In addition, consider updating all documents to include the following:

- A list of answers to frequently asked questions in regard to the supported system

- A glossary of terms or commonly used words and phrases
- Complete coverage of the material through process or procedural steps
- User friendly format where all topics are easy to find and comprehensively linked
- Application short-cuts or quick reference material
- Complete list of error messages and resolutions
- List of contact names and phone numbers

Visual Presentations

Overview

The corporation standards for visual presentations are briefly presented in this chapter. Slide or visual presentations are one of the most important means of communication with Mobil's many different affiliates. Standards for the typography, format, and production of consistent visual presentations have been set in order to promote more effective and cost-effective presentations. Technical writers should use these basic graphic standards and typography guidelines. Adhering to the standards and guidelines ensures continuity, a high standard of quality, and clear, consistent, cost-effective presentations.

Presentation Standards

The guidelines that follow are generally applicable to most types of presentations created by the publications team. Usually the media is transparency film which can be used in laser printers or copiers like ordinary paper to produce black and white presentations. If color is requested, check with the ReproGraphics Department to see if you can communicate with one of the color printers on site.

Since layout format and production method have been established and presented below, all of the transparencies must be prepared in this manner. Do not mix formats and methods in the same presentation. Mixing visuals produced by hand, high-end or low-end software, or any other method result in a disorganized visual presentation.

Format

Microsoft PowerPoint has several templates for presentations. Select one of these for ease of creation of your presentation.

A flush left alignment is used for all text including charts and graphs. This applies to headings, subheadings, and body text. Some exceptions may be headings over columns of numbers in tables, text burned into a full-frame photo, or a slide consisting of just several words. In such instances, text may be positioned where appropriate.

In screen layout, allow more space at the bottom than at the top.

In general, headings should be clear, prominent, and larger than the text. Upper and lower case letters should be used for maximum legibility. A continuous rule, or line, under the heading may be used for emphasis and separation. If rules are used, they should be consistently applied throughout the presentation.

Use solid bullets for lists.

Text

Proper letter and word spacing is very important. Slightly open spacing styles are better suited to light projection than very tight spacing.

Keep all text to a minimum. Use words that complement the audience's knowledge, experience, and interest levels.

Use Arial exclusively for text on the transparencies, no smaller than 18 point. Text formatted smaller than that is not read easily on a transparency. For maximum clarity and quick reading, type size should be restricted to 2 or 3 different sizes for the entire presentation. The alphabet should always be used in upper and lower case. Use initial caps only.

Color

Complete standards have not been established for company presentations since there may be deviations from this for internal versions or special cases. However, a color palette has been established that should be used consistently throughout the presentation. Even if the presentation has no color other than black, decide on which shades of gray you will use. You must carefully consider the colors for both the background and the type and charts. Background colors can drastically affect the readability of the type. If the type and background colors are too close in value (lightness or darkness), the type will tend to "vibrate" and be very difficult to read.

The following chart shows the MEPUS standards for presentation elements and suggestions for free-form presentations.

Element	General Recommendations
Background	Blue should be used or dark values of black, red, or green.
No Graded Background	Many computer graphics programs let you set gradients from dark to light, light to dark, or light in the center and dark at the top and bottom. Do not use this element.

Element	General Recommendations
Headings	White is the preference; however, you may use yellow, or gold.
Body Text	Use white or yellow.
Underline or Ruling Line	Use red as a contrasting color to background and text.
Bullets	Use red to compliment the underline or rule line also in contrasting color to background and text.

References

The material in this guide was compiled with reference to the following publications.

The Chicago Manual of Style. 14th ed. Chicago: University of Chicago Press, 1993.

Documentation Style Guide. Mobil Exploration and Producing U.S. Inc., Information Systems. August 4, 1995.

Microsoft Corporation. *The Microsoft Manual of Style for Technical Publications*. Redmond, WA: Microsoft Press, 1995.

Style Manual. Washington: United States Government Printing Office, 1984.

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