



Fashioning Style Guides for Your Technical Communications Team

Keith Schengili-Roberts • January 24, 2018



Keith Schengili-
Roberts

Who's This Guy?



What I do:

- DITA Evangelist & Market Researcher at IXIASOFT
- Chair of OASIS DITA Adoption Committee
- Member of OASIS DITA Technical Committee and LwDITA Sub-committee
- Lecturer on Information Architecture at the University of Toronto
- 12+ years of experience with DITA XML



Am Also “DITAWriter”

- Industry blog started 7+ years ago
- Over 285,000 hits(!)
- Regularly updated info on DITA conferences, DITA books, companies using DITA, DITA CMSes, DITA editors, other DITA tools, and DITA consulting firms
- News and views on DITA use
- Also features interviews with those making a difference in the world of DITA

The screenshot shows the DITAWriter website interface. At the top, there is a navigation bar with links for ARTICLES, NEWS, INTERVIEWS, WEBINARS, SOFTWARE UPDATES, DITA CONSULTANTS, and ABOUT. A search bar is located on the right. Below the navigation is the site logo, which includes the text '<di>a>Writer' and a circular icon. A secondary navigation bar lists categories: DITA CONFERENCES, DITA BOOKS, COMPANIES USING DITA, DITA CMSes, DITA EDITORS, and DITA TOOLS. The main content area features a large banner for the book 'CURRENT PRACTICES AND TRENDS IN TECHNICAL AND PROFESSIONAL COMMUNICATION' edited by Stephen Crabbe, with a 'BOOK EXCERPT: DITA AND OTHER STRUCTURED XML FORMATS'. Below this is a 'Latest Blogs' section with a post titled 'SIGDOC 2017: EDUCATING TOMORROW'S TECHNICAL COMMUNICATORS'. On the right side, there is a 'FOLLOW ME ON TWITTER' section with a tweet from @IXIASOFT and a 'RECENT POSTS' section listing several articles.



Agenda



1. Introduction
2. Building an Internal Documentation Set
3. The Benefits of Having a Writing Style Guide
4. Documenting Your Processes
5. Having a DITA Style Guide
6. DITA Output Test Document
7. Q/A



Building an Internal Documentation Set

The Documents Your Doc Team Needs and Why



Why Have Internal Documentation?

- Consistency: helps present a single “voice” to your users
- New Team Members: brings them up-to-speed more quickly
- Ongoing Reference: team members have a reference they can easily check when a question arises
- Institutional Memory: answers the “what happens if you get hit by a bus” question





What Do You Need?

If you are not using DITA:

- A writing style reference
- An outline of your internal processes

If you are using DITA, you need two additional documents:

- A DITA “style” guide
- A test document for your output



The Benefits of Having a Writing Style Guide

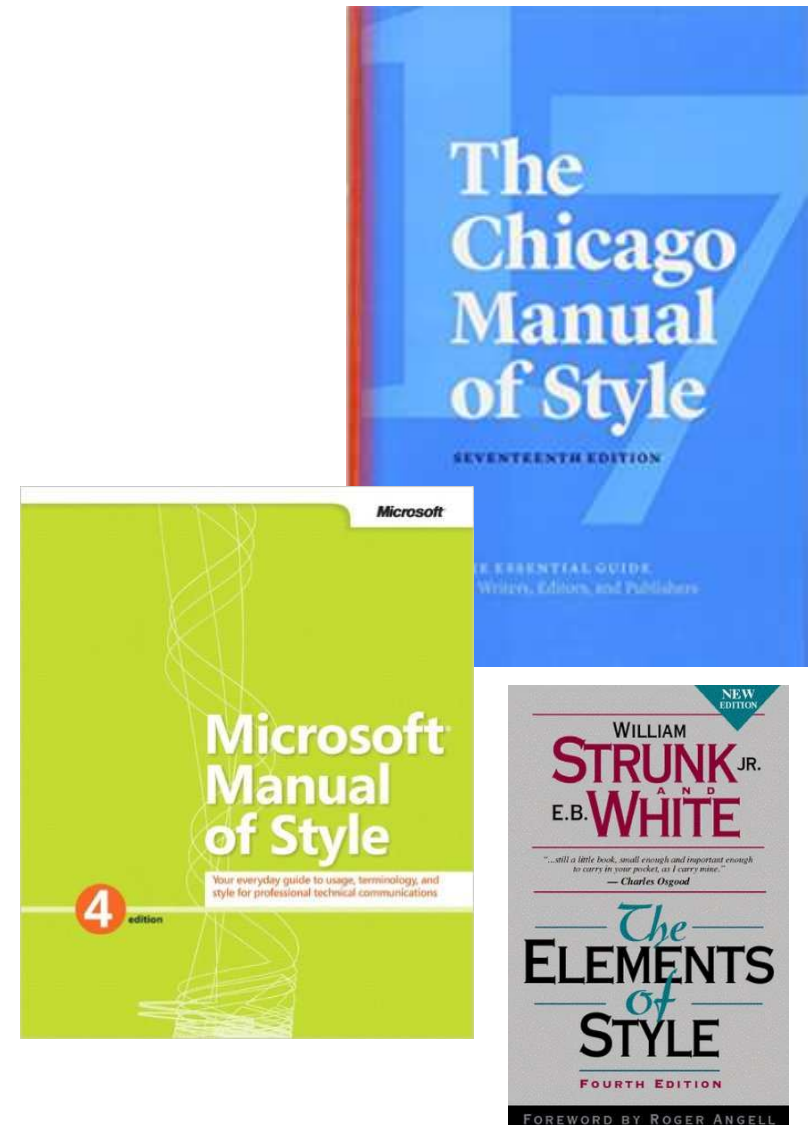
Why it matters to the technical writers on your team



Use External References

Borrow from the extensive work done by others! Works to consider:

- *The Chicago Manual of Style* or *The Associated Press Stylebook*
- *Microsoft Manual of Style for Technical Publications*
- Strunk & White's *The Elements of Style*
- *Systems and software engineering: Requirements for designers and developers of user documentation* ISO/IEC 26514:2008
- Other references specific to your line of business





What These External References Can Do for You

- Provide guidelines for grammar usage (serial or Oxford comma?)
- Direction on tone and voice (how to write in first, second or third person; passive vs. active voice)
- Provides a model that you can extend in your own style reference





Build Your Own Writing Style Guide

- It's not enough to simply point to an external guide, but to cover specific instances that make sense in your own context
- Should cover:
 - Terminology choices (“3D”, “3-D”, “three D”?)
 - Case usage for titles and captions
 - List item usage (period at end of final point?)
 - U.S. or British spelling (“defense” or “defence”?)

Always illustrate these points with examples!





Provide Incorrect and Correct Usage Examples

Illustrate your points by first providing an example of incorrect usage, followed by correct usage:

- **Use trademarks as adjectives:** trademarks should be followed by a generic noun that the trademark describes, not used as nouns in and of themselves.
 - Incorrect: Install Windows®.
 - Correct: Install the Windows operating system.
- **Do not use trademarks possessively:** use the generic noun that follows to indicate possession.
 - Incorrect: The XYZ's cables are included in the box.
 - Correct: The XYZ headphone's cables are included in the box.



Other Things You Could Cover

- Active vs. passive voice
- Use of gender-neutral language
- Audience
- Sentence length
- When to use gerund phrases (such as in titles for task topics)
- Whether and how possessives can be used
- Number usage (i.e. spelled out or number?)
- Acronym and abbreviation usage
- When to use hyphens, en dashes and em dashes



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Documenting Your Processes

The Processes that Determine How Your Docs are Produced



Process Guide

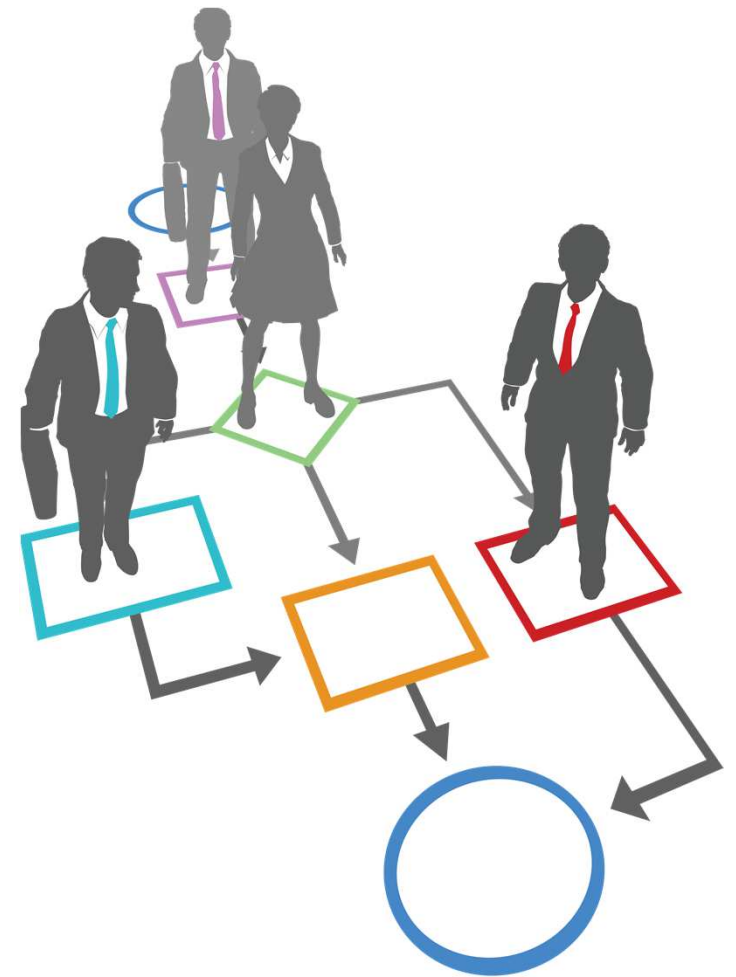
Why have one?

- Helps new people unfamiliar with your processes
- Serves as a reference when a novel situation arises
 - Can settle disputes over who does what and when
 - Makes concrete what may have never previously been written down



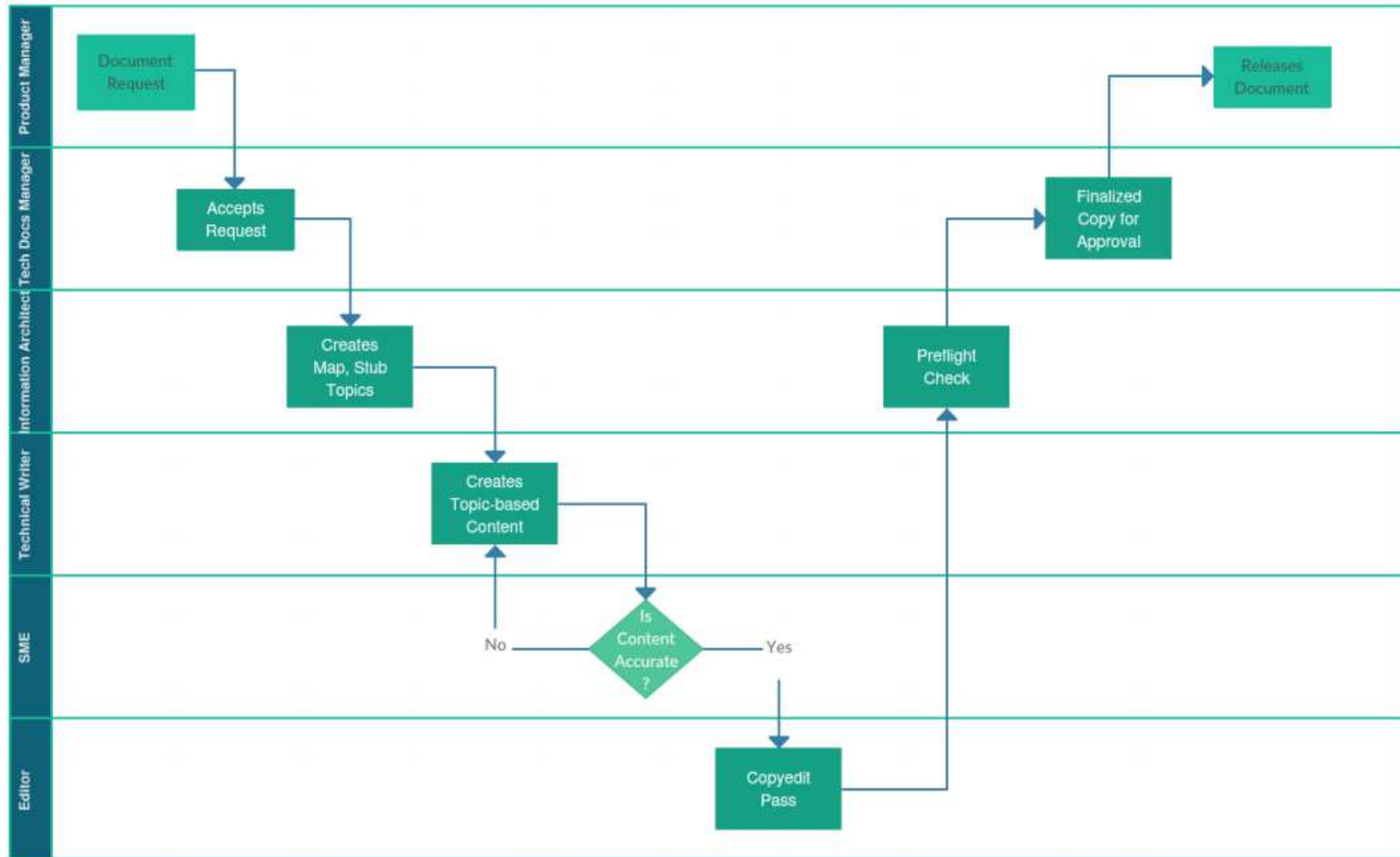
What to Cover

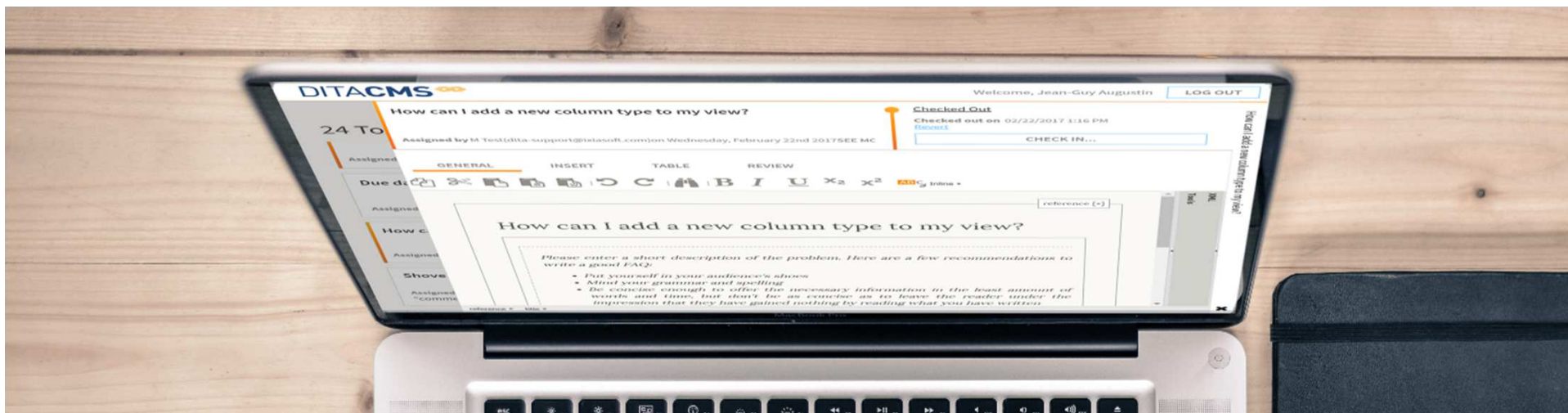
- It should outline your publication process from draft stage to finalized and approved document, detailing each step
- Define all roles in the process (writer, editor, SME, localization coordinator, approver, etc.)
- Consider creating swimlane flow chart(s) outlining the process for easy reference





Sample Documentation Swimlane Diagram





Having a DITA Style Guide

Why DITA “Style” Matters





DITA Style?

- The DITA specification is large; this is a chance to define what tags you use and in what context
 - If you have constraints in place, document them!
- Emphasize and cover (local) best practices
- Also a chance to educate new writers and as a reference for experienced writers





What Not to Do: Use Every DITA Tag Possible

Basic + Technical DITA 1.3 Elements

One story from a DITA implementation: “We had the approach of: if it’s there we should use it”

A self-made problem: “The ridiculous thing was that we weren’t using these tags before DITA, so why we thought we suddenly had a need for `filepath` etc. I have no idea.”

The result: “the writers soon revolted and refused to put in multiple inline tags per paragraph.”

| | | | | | | | |
|--------------------------|----------------|-------------------|----------------------|-------------------------|----------------------|---------------------|---------------------|
| abbreviated-form | change-started | dlhead | groupchoice | msgblock | propdeschd | source | textentity |
| abbrevlist | change-summary | draft-comment | groupcomp | msgnum | properties | spare | tgroup |
| abstract | chapter | draft-intro | groupseq | msgph | property | spares | thead |
| addressdetails | chdesc | dt | hasInstance | namedetails | prophead | sparesli | thoroughfare |
| administrativearea | chdeschd | dthd | hasKind | navref | proptype | started | title |
| alt | chhead | dvrKeystonePrefix | hasNarrower | navtitle | proptypehd | state | titlealts |
| amendments | choice | dvrKeystoneSuffix | hasPart | noconds | propvalue | stentry | tm |
| anchor | choices | dvrResourcePrefix | hasRelated | nosafety | propvaluehd | step | toc |
| anchord | choicetable | dvrResourceSuffix | hazardstatement | nospare | pt | stepresult | topic |
| anchorkey | choption | edition | hazardsymbol | nosupeq | published | steps | topicapply |
| anchorref | choptionhd | elementdef | honorific | nosupply | publisher | stepsection | topicCell |
| apiname | chrow | emailaddress | howtoavoid | note | publisherinformation | steps-informal | topicgroup |
| appendices | cite | emailaddresses | i | notices | publishtype | steps-unordered | topichead |
| appendix | closereqs | imagemap | image | no-topic-nesting | q | steptroubleshooting | topicmeta |
| approved | cmd | index-base | imgentry | numcharref | refbody | stepxmp | topicref |
| area | cmdname | index-see | index-block | object | refbodydiv | sthead | topicset |
| attributedef | codeblock | index-see-also | indexlist | ol | reference | strow | topicsetref |
| audience | codeph | index-sort-as | index-inline | oper | refsyn | sub | topicsubject |
| author | coderef | index-sort-also | equation-figure | option | related-links | subjectCell | topicSubjectHeader |
| authorinformation | colophon | indexterm | equation-inline | organization | relatedSubjects | subjectDef | topicSubjectRow |
| b | colspec | indextermref | equation-number | organizationinfo | relcell | subjectHead | topicSubjectTable |
| backmatter | completed | info | estime | organizationname | relcolspec | subjectHeadMeta | trademarklist |
| bibliolist | component | isbndiv | example | organizationnamedetails | relheader | subjectref | troublebody |
| body | conbody | isbntext | exportanchors | otherinfo | relrow | subjectRel | troubleshooting |
| bodydiv | conbodydiv | itemgroup | featnum | othermeta | reltable | subjectRelHeader | troubleSolution |
| bookabstract | concept | keydef | fig | overline | remedy | subjectRelTable | tt |
| bookchangehistory | condition | keyword | figgroup | p | reqcond | subjectRole | tutorialinfo |
| bookevent | consequence | keywords | figurelist | param | reqconds | subjectScheme | typeofhazard |
| bookeventtype | contactnumber | kwd | filepath | parameterentity | reqcontp | substep | u |
| bookid | contactnumbers | lastname | firstname | parml | reqpers | substeps | uicontrol |
| booklibrary | context | li | fn | parname | required-cleanup | summary | ul |
| booklist | coords | lines | foreign | part | resourceid | sup | unknown |
| booklists | copyfirst | line-through | fragment | pd | result | supeqli | url |
| bookmap | copyholder | link | fragref | permissions | responsibleParty | supequi | url |
| bookmeta | copyright | linkinfo | frontmatter | perscat | reviewed | supequip | userinput |
| booknumber | copyrlast | linklist | generationidentifier | perskill | result | supplies | ux-window |
| bookowner | copyyear | linkpool | glossAbbreviation | person | revised | supply | var |
| bookpartno | country | linktext | glossAcronym | personinfo | revisionid | supplyli | varname |
| bookrestriction | created | locality | glossAlt | personname | row | svg-container | volume |
| bookrights | critdates | localityname | glossAlternateFor | personnel | safecond | svgref | vrm |
| booktitle | data | longdescref | glossarylist | ph | safety | synblk | vrm |
| booktitlealt | data-about | longquoteref | glossBody | platform | schemeref | synnote | wintitle |
| boolean | day | lq | glossdef | plentry | screen | synnoteref | xmllatt |
| brand | dd | mainbooktitle | glossentry | postalcode | searchtitle | synph | xmlement |
| category | ddhd | maintainer | glossgroup | postreq | section | syntaxdiagram | xmlnsname |
| cause | dedication | map | glossPartOfSpeech | pre | sectiondiv | systemoutput | xmpi |
| change-completed | defaultSubject | mapref | glossProperty | preface | sep | table | xref |
| change-historylist | delim | markupname | glossref | prelreqs | series | tablelist | year |
| change-item | desc | mathml | glossScopeNote | prereq | shape | task | |
| change-organization | dita | mathmlref | glossShortForm | printlocation | shortcut | tbody | taskbody |
| change-person | ditavalmeta | menucascade | glossSurfaceForm | prodinfo | shortdesc | tbody | tasktroubleshooting |
| change-request-id | ditavalref | messagepanel | glossSymbol | prodname | simpletable | tbody | tbody |
| change-request-reference | div | metadata | glossSynonym | prognum | sl | tbody | tbody |
| change-request-system | dl | middlename | glossTerm | prolog | sli | tbody | tbody |
| change-revisionid | dentry | month | glossUsage | propdesc | sort-as | tbody | tbody |



What Should it Contain?

Some examples of what it could include:

- Define the content that should go into each topic type
- Nesting rules (e.g. how “deep” list items can go)
- Typical table structuring (Simple vs CALS? Both?)
 - How images are managed (insert fig and caption?)
- What are valid image types?
- Outline preferred block and inline tags
- Key structure (e.g. their naming convention and where to find them in a map)
- Any existing filtering conditions and how/when to use

Provide relevant examples!



One Example: Writing Short Descriptions

Task Topics: Write task short descriptions so that readers understand what they can accomplish once they read the topic.

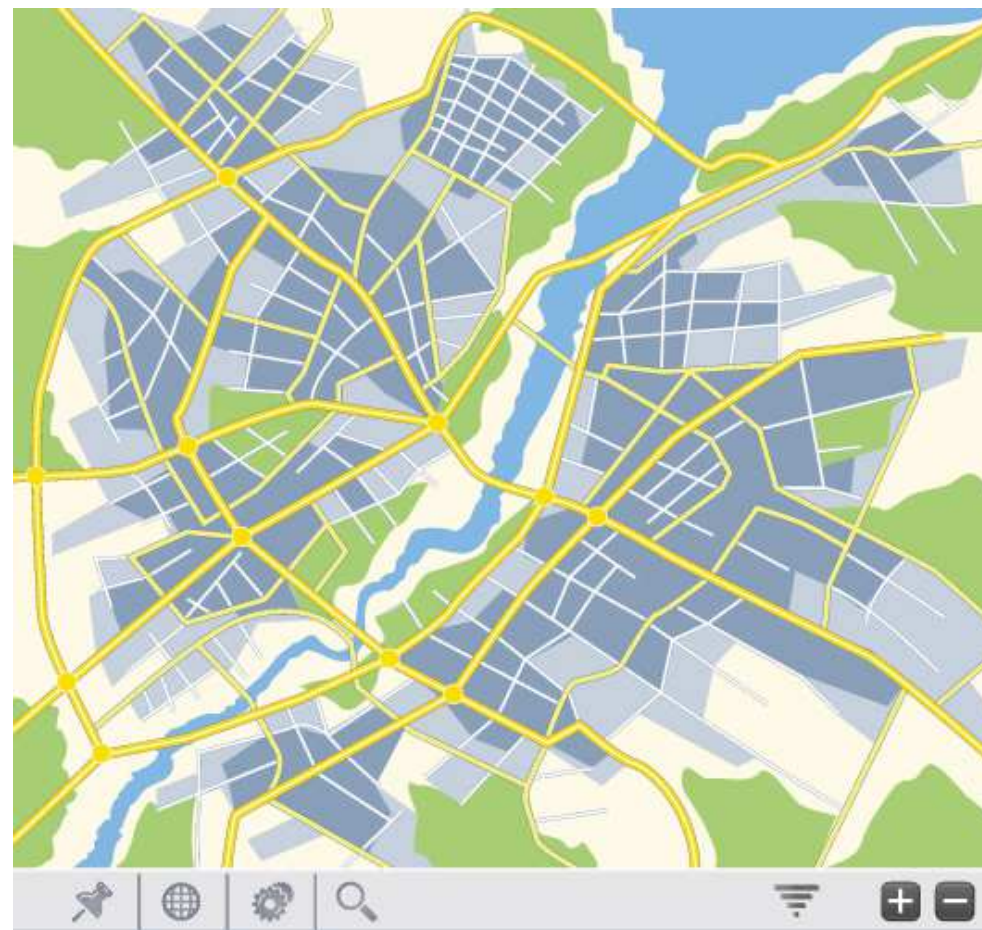
Example: “How to Set Security Settings”

- **Incorrect:** Use this procedure to configure security settings for the ABC product.
- **Correct:** Security settings determine who can and cannot use the ABC product.



Don't Forget Map Usage!

- Describe/illustrate a typical bookmap structure
- What are the metadata you use? If you have a subjectScheme, list and describe its values
- Outline any nesting rules for topics and maps within your bookmaps





Talk About Writing for Reuse

- Typical words to avoid, such as “above”, “below”, “new”
- Ensure topics focus on conveying a single idea/procedure; no “omnibus” topics
- Rules on what to conref, e.g. only at block or sentence level, but not at phrase level; or whether you use “library” topics
- Document key usage and how they are structured in a typical document



CONTENT



Things Specific to Your Output Types

- Do you use `outputclass` for handling specific conditions? If so, document when and where they are used and the intended effect they have
- If you implement constraints (or deprecate elements), outline what domain or specific elements are restricted and why

Deprecated Members of the Highlight Domain

These shouldn't be used because they contain no semantic information, but exist and will format. (For localization purposes these form a useful basis for understanding the target language's style conventions.)

- *italic*
- **bold**
- `teletype/monospace`



DITA Output Test Document

What Things Should Look Like, and Checking for Edge Cases



A DITA Test Output Document? What's That?

- A DITA test document is a map + topics designed specifically to test output conditions
- As new XSL transforms are added, add content to the test document to see how they work
- Can be used to test fonts, image sizing, widow/orphan control, how errors appear; basically to test the “look and feel” of *everything*

Caution:

Remember to discharge your body's static electricity by touching the power supply case or the metal surface of the computer chassis.

4. Remove any unneeded graphics cards from the computer.

Warning:

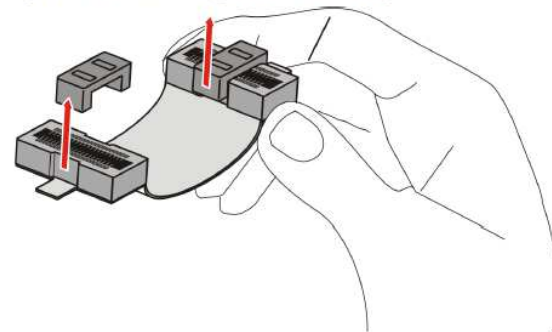
Some graphics cards can get hot while operating. Wait approximately five minutes after turning off the computer before touching the card.

5. Locate the PCIe slots on the motherboard. If necessary, remove the corresponding back panel cover.
6. Align the new graphics card in the secondary PCIe slot next to the existing graphics card and press firmly until the card is fully seated.
7. Remove protection tags from the ends of the AMD CrossFire interconnect and connect the cards.

Caution:

Always handle the AMD CrossFire bridge interconnects by the connector only. Do not push or pull on the flexible cable.

Figure 3-32 AMD CrossFire™ Bridge Interconnect Protection Tag





Examples of `outputclass` Formatting

- Show how any specific `outputclass` are implemented and what to expect

Horizontal with First Column Emphasis

The “Horizontal with First Column Emphasis” table style is the same as the Horizontal table style, but with the first column treated as a heading.

“Horizontal with First Column Emphasis” table style is the default table style; if you do not set the table's `outputclass` attribute, this is what you get.

Alternatively, Horizontal with First Column Emphasis table style is specified by setting the value of the table's `outputclass` attribute to `horizontal` and the value of the table's `rowheader` attribute to `firstcol`.

| Stuff 1 | | Stuff 2 | |
|--------------|--------------|--------------|--|
| Col 1, Row 2 | Col 2, Row 2 | Col 3, Row 2 | Col 4, Row 2 |
| Ghastly | (1,2) | (1,3) | Shoggoth |
| Grim | (2,2) | (2,3) | Special extended supplementary tax form detailed variant |
| Unpleasant | (3,2) | (3,3) | root canal |
| Appalling | (4,2) | (4,3) | venison sorbet, served warm |



Why Have a DITA Test Document?

- General reference for output formatting
- Demonstrates typical look-and-feel of your output (such as PDF) both for your team and those with an interest in corporate branding
- Should contain all branding elements, boilerplate information, etc.
- A comprehensive look at how content can be structured

Note: Note elementMauris vel nunc nec tortor sagittis bibendum. Vivamus pede nulla, aliquet vel, condimentum eu, egestas id, erat. In dignissim dapibus tortor. Vivamus feugiat magna id nisi. Sed varius, pede sed dignissim sollicitudin.

Tip: Note element Mauris vel nunc nec tortor sagittis *bibendum*. Vivamus pede nulla, aliquet vel, condimentum eu, egestas id, erat. In dignissim dapibus tortor. Vivamus feugiat magna id nisi. Sed varius, pede sed dignissim sollicitudin.

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“It was Working Before”

- It’s also a good way to test that everything is working as it should.
- Example: shortly after a software upgrade, images no longer rendered properly for a new document; blame was put on software
- Separate test installation showed that new software was working fine
- A recent change in how images were inserted into DITA code was the real culprit; in the end a single line of XSL code had to be tweaked
- Discovering the root cause without having a test document *took 8 hours...*





Proulx's DITA Test Document Dictum

- Create a separate test document designed to test all aspects of your DITA output conditions
- It can serve as a companion to your style guide, showing expected output under all circumstances
- Every time something is changed (new DITA feature, software, rendering engine, etc.), check output using test document and compare to previous version
- Should *not* be an existing document, as it can always be changed (as the last example shows)



Martin Proulx
Senior IT Specialist &
Integration, IXIASOFT



Other Tools that Can Help

- Acrolinx analyses content as it is being written by your writers
- Schematron rules can be used with DITA content to help enforce house style
- QA Plugin for DITA-OT checks for passive voice, word count, “junk word” usage, etc.

```
<pattern is-a="restrictWords" id="restrictDescription">  
  <param name="parentElement" value="shortdesc"/>  
  <param name="minWords" value="3"/>  
  <param name="maxWords" value="50"/>  
</pattern>
```

Language and Asset Counts

% Passive Topics

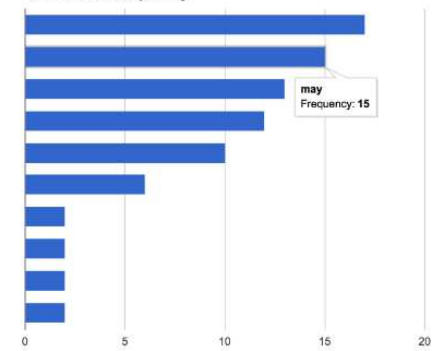


3202 Total Words

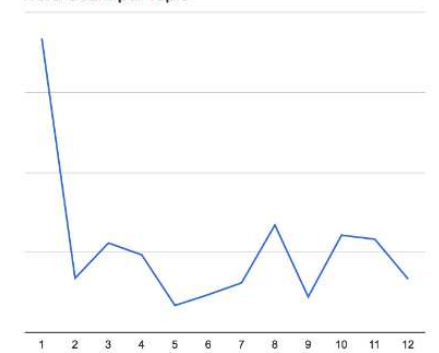
3 Images

0 Links

Junk Word Frequency



Word Count per Topic





These are Living Documents!

- Typically an editor is entrusted with adding to and updating these documents on a regular basis
- Should embody what they cover (“self documenting”)
- Whenever there is a style-related dispute within your team, the decided outcome should be documented
- Don’t create these all at once, instead build them over time



JOHN WHITE



Summing Up

Creating an internal documentation set covering your house style provides the following:

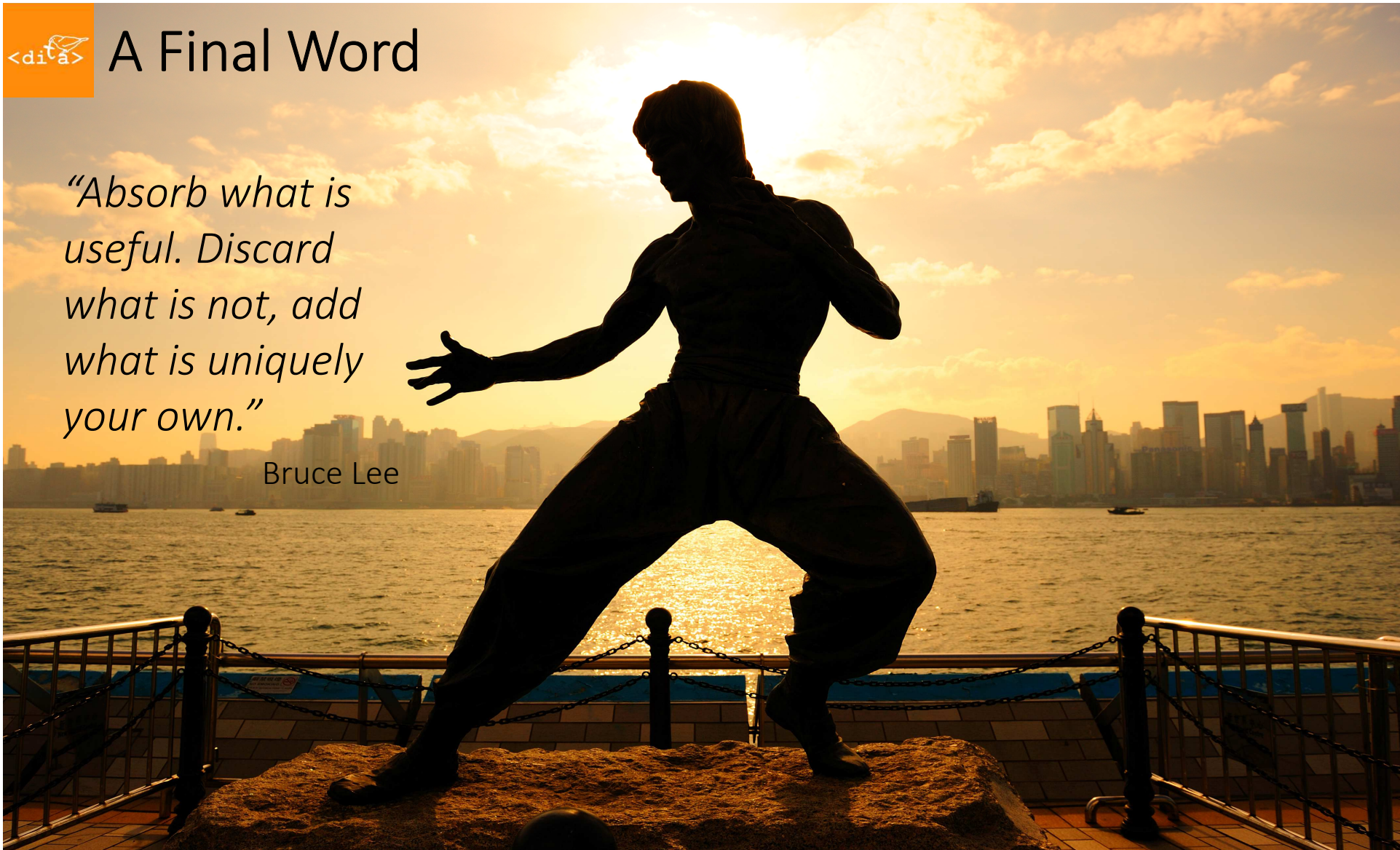
- A basis for creating a consistent message and voice to your users
- Educates new members of your team
- Exists as a reference for existing team members
- Outline processes to follow
- Describes best practices to follow
- Tests edge cases in formatting
- Can settle disputes!



A Final Word

“Absorb what is useful. Discard what is not, add what is uniquely your own.”

Bruce Lee





Further Reading

- The DITA Style Guide, by Tony Self:
<https://ditastyle.com/>
- QA Plugin for DITAOT:
<https://sourceforge.net/projects/qa-plugin-dot/>
- Schematron for Information Architects, oXygen
<https://www.oxygenxml.com/events/2015/Schematron4ia.dita.pdf>



QA



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- Blog on www.ixiasoft.com
- Twitter: @IXIASOFT and @KeithIXIASOFT
- Email: robertsk@ixiasoft.com
- IXIASOFT DITA CMS Users LinkedIn group
- OASIS DITA Adoption Committee articles
- Member of OASIS DITA Technical Committee