Knowledge Base Style Guide

All articles in the ITS Knowledge Base will follow a consistent style and tone. This style guide is intended to provide a set of standards for content and formatting that should be applied to all articles. Please visit Creating Articles for descriptions of the types of articles that will be written in this knowledge base. This style guide pertains to all types of articles.

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1.0 Article Content

The content of the articles should be clear and concise and should be geared towards a lay audience with minimal technological experience.

1.1 – Article Topics

Articles should focus on a single topic that would be of interest to the intended audience of the knowledge base.

How to Articles

For how-to articles, the topic will be task-oriented. Articles that contain more than one task should be broken up into two separate articles.* For example, an article such as "Changing and Resetting your Google Password" should be broken up into two articles titled "Changing your Google Password" and "Resetting your Google Password." This is done because changing a password and resetting a password are two separate tasks with two separate sets of instructions.

*We would rather have more short and descriptive articles than have longer articles that cover multiple topics.

Troubleshooting Articles

Troubleshooting articles should focus on helping the user solve a problem that they are having. Similar to how to articles, troubleshooting articles should focus on a single user issue (i.e. "Cannot connect to UConn Secure" or "Wifi adapter shows there is no internet"). If your article helps the user solve a single issue, but you need to ask multiple questions to either identify the problem or provide the user with a range of possible solutions, then you can include all of that content in a single article. Typically, these types of articles have "troubleshooting" at the end of the title (i.e. "HuskyVision Troubleshooting").

Informational Articles

Informational articles should provide a brief overview of a topic and help orient readers so that they can understand a concept and seek more informed assistance on an issue.

1.2 – Article Titles
How To Article Titles

For how-to articles, we start with a gerund (a verb +ing that is used as a noun, i.e. "Adding a Mass Mail Account in Outlook"). Below are some guidelines for titling how to articles.

- Pick one word for actionable things. Instead of titling an article "Archiving or Saving Emails..." title it "Archiving Email..." or "Saving Email..."

Troubleshooting Articles

For troubleshooting articles, the title should be the problem the user is trying to solve (i.e. "Printer is flashing red and won’t print").

Informational Articles

Titles for informational articles should make it clear what topic is covered in the articles. Typically, these types of articles will have "overview" at the end of the title or the title will ask a question that the article answers (i.e. "G Suite Overview" or "What is G Suite?").

1.3 – Labels

All articles must include labels (or metadata), keywords that are related to the topic of the article. Labels will help support an effective search and group related articles together.

1.4 – Summary Statements

Article summaries are meant to help to user quickly assess the relevance of the article for their problem or question. Article summaries should include two things: (1) Who the article is intended for and (2) what functionality the user can gain from the article.

EXAMPLE 1: “This article is intended for students who are trying to set up their G Suite account for the first time.”
EXAMPLE 2: “This article is intended for student, faculty, and staff who cannot connect to UConn Secure”

Subsequent sentences in the summary should follow a hierarchical structure in that the most important information for the user to assess relevance is put first.

1.5 – Links

Linking to other Confluence articles

Topics come up while writing that may not be familiar to the user. If while writing you find that you mention a topic that may need further clarification and we have an article in our KB that clarifies that topic, please link that article to the page. Link the article so that it is embedded in the text that you are writing (i.e. When you are Changing Your NetID Password, please follow the password guidelines). You may need to change the way the link displays so that it syntactically fits with your writing (i.e. You must have Password Recovery Options set up in order to reset a forgotten password).

To insert these links to your article, click on the link icon (🔗) in the toolbar at the top of the edit window. Click Search and type in the name of the article in Confluence that you want to link. At the bottom of that window, you can change how the link appears in your article by altering the "link text." Then click Insert.

Linking to websites outside of Confluence

If you need to link to a page outside of Confluence, like netid.uconn.edu, please insert the link without the "http://" by altering the link text. Additionally please use the actual link if the link is small, like email.uconn.edu. For longer links, you will probably have to change the link text so that the link takes up less space on the article.

To insert these links to your article, click on the link icon (🔗) in the toolbar at the top of the edit window. Click Web Link and type in or copy and paste the link into the "Address" box. If needed, you can change how the link appears in your article by altering the "link text." Then click Insert.

1.6 – Note/Info/Tip/Warning Macros

When inserting these macros, add the name of the macro (Note, Info, Tip, or Warning) under the "optional title" section of the macro edit window. To access the macro edit window, left click on the macro and click Edit.

See below for examples of what each Macro title should look like.

See below for examples of what each Macro title should look like.

adding an info macro and titling it "Note"***

2.0 Article Formatting
The formatting of the articles should enable readers to skim the article easily and assess relevance.

2.1 – Bold Words
When you are instructing the reader to perform an action, such as clicking or entering, you should bold the word that corresponds to the on-screen buttons /clickable elements.
EXAMPLE 1: Click Save My Information to continue to the next screen.
EXAMPLE 2: Enter a personal email address (not your @uconn.edu) in the “Secondary Email Address” field, and click Save Changes.

2.2 – Quotation Marks
When instructing a reader to look for text on their screen, use quotation marks around the words they should be looking for.
EXAMPLE 1: Quotation marks should not be used when looking for text within a button/clickable element (see “Bold Words” above).
EXAMPLE 2: Un-check the box next to “Show Labels for Each Page.”

2.3 – Headings
All headings should specifically describe exactly what is in that section of the article. Usually in how to articles, headings are a re-iteration of the article title. (i.e., if the article title is “Accessing Email in Windows.” then the heading should be the same thing instead of something like “Accessing Email” or “Email in Windows.”) When applied consistently, headings help readers skim content and understand the article’s organization quickly. It also enables macros within our KB to work correctly.

• All article titles should be formatted as Heading 1.
• All second level headings within the article, which mark the different sections within an article (e.g., Article Content), should be formatted as Heading 2.
• Any subheadings underneath a level 2 heading should be formatted as Heading 3, then heading 4, and so on.

Create headings by highlighting the text. Then, in the toolbar, click the dropdown menu that by default says “Paragraph.” You can choose to add headings as you see fit, just ensure that the heading style is appropriate for level of your heading.

Note
All headings, regardless of which type of heading they are (Heading 1, Heading 2, Heading 3, etc.) should follow standard capitalization practices for titles such that the major words in the title are capitalized. For example a heading should read “Helpful Functionalities of the Confluence Editing Window” instead of “Helpful functionalities of the confluence editing window.”

2.4 – Numbers and Bullets
Numbers and bullets are effective way to highlight key steps or information and break up blocks of text into meaningful units.

• Use number for the steps of a process. Most How-To and Troubleshooting articles will have numbered steps. Use bullets when you are listing items that do not need to be performed in order or when simply providing information.
• For consistent and easy formatting, use the toolbar to set these styles.

2.5 – Spacing
Use spacing to show what information belongs together and what is separate.

• Insert one line’s worth of space between steps and paragraphs.
• For screenshots, leave no space between the image and text it illustrates, but do leave a space after the screenshot to distinguish it from the next step.

Info
If you are trying to get lines of text to not have any spacing between them, use ”shift+enter” when on the preceding line of text.

3.0 Writing and Editing

3.1 – Language
The majority of the articles in the public-facing knowledge base will be intended for a lay audience and should be written in plain language. Focus on the task they are trying to accomplish from their perspective and less on the technical language used to describe it.
EXAMPLE:

• Use task-oriented, plain language: Login on the Single Sign On screen with your NetID and NetID password.
• Avoid an overly technical description: Authenticate into CAS with your NetID credentials.
3.2 – Images

Images can impart a lot of information quickly. However, they can also become outdated quickly and add a lot of length to an article. Choose to use an image when it clarifies a more complicated action or conveys a lot of information quickly. When considering how and when to use an image, follow these guidelines:

1. When to use Images
   a. Use images when the instructional steps are complex or several actions are incorporated into a step or into many steps.
   b. Ask yourself: Is the image really necessary? Can I just use plain text to get the same message across?

2. Consistency of Image Capture Method
   a. All KB contributors should be using a standard image capturing method. This will allow for consistency among the KB articles.
      i. For PC use the snipping tool. Make sure you take your snip at a high enough zoom so that the resolution is maintained once you place your image into the article. Add call outs as necessary in power point (see section 4.2 of this style guide).
      ii. For Mac use the print screen function and crop the image. Make sure that the section you want to crop is not too small and that it will retain a high resolution when you input the image to your article. Add call outs as necessary in power point (see section 4.2 of this style guide).

3. Image Size
   a. Screenshots should be big enough to get the point across without having to click on or enlarge the image. Users should be able to clearly view the image contents without having to click on it.
   b. Ensure that you size the image in Confluence so that it does not extend past the text around it, and so that it is not too small either. Judgement is key here.

4. Image Borders
   a. Images with a white background will get lost on a white page, so consider adding a 1x black border around the image.

5. Image Position
   a. Images should always be below the explanatory text that references the image.

6. Alt Text
   a. For Images where there is explanatory text above the images
      i. In this case the explanation is already above the image, so to avoid redundancy we will use a NULL alt tag. To put in a NULL alt tag, just put double quotes "" into the alt text dialogue box.
      ii. If your image requires the user to pay attention to multiple parts of an image, please use image call outs (see section 4.2 of this style guide).
   b. For images that do not have explanatory text above the image
      i. In this case, use a descriptive alt tag when you place an image into your article and have not adequately described above the image what the user is supposed to gain from the image.

3.3 – Definitions

If you have to include a technical word to make sense of the topic, find a way to define it for the reader. Some strategies include:

- Use context to imply the meaning.
  
  EXAMPLE: With two-factor authentication, you will login to a service with your NetID and password and then verify your identify on a second device.

- Explain the term in a clause following its mention.
  
  EXAMPLE: You can create an email alias (the portion of your email address to the left of @uconn.edu) that is different from the name originally assigned by the University.

3.4 – Acronyms

On the first mention of an acronym, spell out the phrase and then follow it with the acronym in parentheses. Example: Many services are behind the Central Authentication Service (CAS).

3.5 – Contractions

Avoid using contractions. We use a more formal tone and contractions are more informal.

3.6 – Capitalization

You should capitalize names and proper nouns (names used for an individual person, place, or organization). Words like ‘faculty’ and ‘staff’ should not be capitalized. When you are writing instructions and are referring to a word that is capitalized on the screen or device, you can capitalize the word to be consistent with the user’s experience. Example: Go to the My Settings & Devices section to add a backup device.

3.7 – Punctuation

In general, use commas, periods, semi-colons, and hyphens appropriately. Avoid exclamation marks, which do not fit the tone of a knowledge base article. One common punctuation mistake is to separate two complete sentences with a comma. Make sure to use a period or join with a comma and conjunction.

Mistake: Enter your full name, then click OK.
Correct: Enter your full name. Then click OK. OR Enter your full name, and then click OK.
For lists and numbered steps, use a period if it is a complete sentence or completes a sentence started by the lead-in phrase.

**EXAMPLE 1: Use a period.**
You can verify your identify on the Duo Mobile App by
- getting a Push Notification and selecting Approve.
- entering the passcode on the app.
- having the service call you.

**EXAMPLE 2. No period**
Stop by the front desk of the ITS Help Center for onboarding assistance.
- Software access and installation
- Virus detection and removal
- Email set up
- Wireless connectivity
- Static IP assignment

### 3.8 – Standardized Terms and Phrases

The following words or phrases should be written or used in the following standard ways when referring to them in your articles. For example, refer to the help center as the “ITS Help Center” or “Help Center,” but do not refer to it as the “help desk” or “husky tech.”

<table>
<thead>
<tr>
<th>Category</th>
<th>Correct Term or Phrase</th>
<th>Do not use</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>UConn Terms</td>
<td>UConn</td>
<td>UCONN, Uconn, uconn</td>
<td></td>
</tr>
<tr>
<td></td>
<td>NetID</td>
<td>netid, Netid, netID</td>
<td>use “NetID” for all instances, including within emails: NetID####@uconn.edu</td>
</tr>
<tr>
<td></td>
<td>ITS Help Help Center, Help Center</td>
<td>Husky Tech, Help Desk, Service Desk</td>
<td></td>
</tr>
<tr>
<td></td>
<td>ITS</td>
<td>UITS</td>
<td></td>
</tr>
<tr>
<td>Outlook</td>
<td>Office 365 Web Access</td>
<td>Office 365 Online</td>
<td>When referring to outlook an its services – “Office 365 Web Access” and the “Outlook Desktop Client” are two different ways to access the same service called “Outlook.”</td>
</tr>
<tr>
<td></td>
<td>Outlook Desktop Client</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Giving Examples</td>
<td>(i.e., ________), or (e.g., ________)</td>
<td>(example, ____ )</td>
<td></td>
</tr>
<tr>
<td></td>
<td>In article titles when referring to things that happen in outlook or windows</td>
<td>“on Windows”</td>
<td>“In Windows/Mac”</td>
</tr>
<tr>
<td></td>
<td></td>
<td>“on Mac”</td>
<td>“for Windows/Mac”</td>
</tr>
</tbody>
</table>

### 3.9 – Article Length

Articles should be kept short and require minimal scrolling. If there are multiple sub-sections in the article and the article is long (scrolling required), consider adding anchors to the subheadings to facilitate quick access to relevant information.

Keep paragraphs short - no more than four to five sentences. Use formatting elements such as bullets, numbers, and note sections to highlight relevant information and break text up into units that are easy to follow. (See Numbers and Bullets in the formatting section). Organize and separate sections with subheadings. This will help readers skim the content and find the desired section (See headings in the formatting section.)

### 3.10 – Macros

Macros are visuals that dynamically organize your content and allow you to draw attention to aspects of your content that you want to have stand out to your readers. They are especially useful when you have a piece of information that is important for your readers but that does not fit into the rest of your article. Additionally, macros provide additional functionality to your articles, enabling you to do things like link pages, condense your content into accordion folders, insert page anchors, create and insert project timelines, and much more. See Macros: Understanding and Inserting Dynamic Content

### 3.11 – Spacing

Confluence headings have built in spacing, but make sure you take out as much space between sections as possible. This helps the reader flow through the information more easily.

### 3.12 – Keyboard Shortcuts
There are a number of helpful keyboard shortcuts that will make your article writing process faster if you would like to use them. Reference the shortcuts here.

4.0 Accessibility

Because we are a public facing and all-inclusive service, we need to ensure that the content of our knowledge base is accessible for all users. Many of our users require assistive technology, such as screen readers. In order to ensure that our knowledge base is accessible for people using assistive technology, we need to follow the guidelines below.

4.1 – Alt Text

What is alt text?

Alt text is applicable when inserting pictures into an article. It is text that describes what knowledge or functionality the reader is supposed to gain from the inserted image. However, alt text is only helpful when it is not redundant.

Note

All inserted pictures in the knowledge base are required to have alt text.

For Images with explanatory text above them

For images that have the purpose of the image adequately described above the image, we use a NULL alt tag that the assistive technology will skip over. We do not add a descriptive alt tag in this case because that would be redundant.

EXAMPLE:

1. Make the text font Arial and the font size 12.
2. Make sure bold is selected and make sure that your highlight color is yellow

Alt text = “”

For images without explanatory text above them

In this case, use a descriptive alt tag when you place an image into your article and have not adequately described above the image what the user is supposed to gain from the image. A descriptive alt tag should describe the purpose of the image or what knowledge the user is supposed to gain from the image.

Inserting Alt Text

Once your picture has been inserted into your article, left click on the picture. Then select "properties." Type in your alt text. Then click save. Click Update or publish in the bottom right corner of the screen (depending on which phase of article editing you are in) and then click edit to re-enter into the editing window. Make sure that your alt text is present.

4.2 – Call Outs in Screenshots

A call out in a screenshot is any shape used to delineate a specific section of the screenshot that you want a user to focus on. Call outs should be mentioned in the explanatory text above when appropriate. When using multiple call outs in a single image, it is imperative that the call outs be differentiated based on shape, not color (for those users that are color vision impaired).

EXAMPLE:

You can search for macros (rectangle) or you can browse through the macros using the left-side list of macros (curly brace).