



COMPENDIUM OF PROCEDURES FOR TECH WRITERS

MS STYLE GUIDE ADAPTED TO
CASPIO NEEDS

INCLUDING GUIDELINES FOR:

TEXT FORMATTING
HELP ARTICLES
RELEASE NOTES & IMPACTED AREAS
TECH TIPS
TROUBLESHOOTING
FAQ

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SECTION 1

General formatting guidelines. A guide to formatting the Caspio HowTo articles

Document control table

<i>Title</i>	General formatting guidelines. A guide to formatting Caspio HowTo articles
<i>Version number</i>	1.0
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1. Scope

This procedure applies to the Documentation Engineering team. It outlines the main standards for writing and formatting Caspio articles.

It is based on MS Style Guide and should constitute a quick reference to formatting Caspio articles. If ever in doubt, or if this document does not provide an answer to your question, please refer to [MS Style Guide](#).

The document includes the following information:

- Structure and formatting guidelines
- Formatting main text elements – quick help

2. Structure and formatting

2.1. Abbreviations

- e.g.
 - Don't use. Use *for example*, *such as*, or *like*, as appropriate.

For example:

There are some legitimate business reasons for spoofing—for example, an assistant might need to send an email to another person within your organization.

- i.e.
 - Don't use. Use *that is* instead.

2.2. Bold formatting

The list below includes elements that appear most often in Caspio articles and should be bolded. For more information, see [MS Style Guide](#).

Elements that should be bolded:

- Blades
- Buttons, checkboxes, dropdowns, and other options
- File names
- Menus
- User input
- Tabs
- Panes

- Key names/ shortcuts
- Database names
- Command lines

2.3. Capitalization

- Use title-style capitalization for titles.
- Otherwise, use sentence-style capitalization:
 - Capitalize the first word of a sentence, heading, UI label (such as the name of a button or checkbox), or standalone phrase. Capitalize proper nouns. Use lowercase for everything else.
 - Always capitalize the first word of a new sentence. Rewrite sentences that start with a word that's always lowercase.
 - Don't use all uppercase for emphasis. (It's OK to use italic sparingly for emphasis.)
 - Don't use all lowercase as a design choice. Although all uppercase is used occasionally as a design element, don't use it in text.
 - Don't use internal capitalization (such as AutoScale or e-Book) unless it's part of a brand name. Don't capitalize the spelled-out form of an acronym unless it's a proper noun.
 - When words are joined by a slash, capitalize the word after the slash if the word before the slash is capitalized. For example: Country/Region, Turn on the On/Off toggle.

2.4. Code snippets

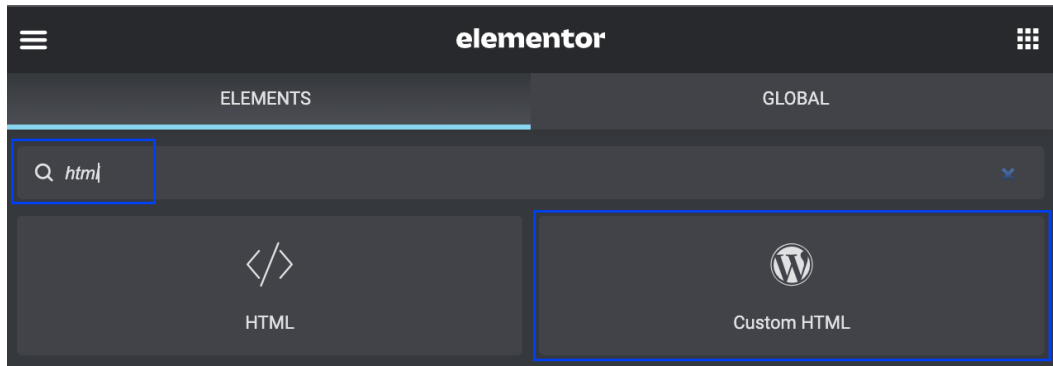
- Use a colon (:) in the line that introduces the code.

For example:

Copy and paste the following code in the Footer section:

```
<script type = "text/javascript" >
  var timer = setInterval(function() {
    //Find if chart exists using rect element every x milliseconds
    if (document.getElementsByTagName('rect') != null) {
      //Update Chart
      UpdateChart();
    }
  }
```

- Follow this procedure to implement the code snippet on a page:
1. Type the word **HTML** on the search field of the Elementor menu. Then, use the **Custom HTML** element.



2. Drag the **Custom HTML** element to the bottom of the page, that is the **Drag widget here** section. Enter the word **code** with a number in the title field. In this case, it should be number one since it's the first snippet.


Convert the HTML code you are going to paste into the [Convertor](#) and paste it into the **Content** field. Make sure to enclose the code with the **<pre class="prettyprint"></pre>** tags.


Select **Apply**.

≡

Edit Custom HTML

⋮

Content

Advanced

Update changes to page

APPLY

Title:

code1

Content:

```
<pre class="prettyprint">
<script>

var field = 'InsertRecordFIELDNAME';

var input = document.querySelector('#' + field);
input.maxLength = 14;
input.onkeyup = telephize
input.onkeydown = telephize

function telephize(v_e) {
// this.value = this.value.replace( /&#92;D+/g, '&quot;&quot;' ).replace( /([0-9]
{1,3})([0-9]{3})([0-9]{4}$)/gi, '&quot;($1) $2-$3&quot;' ); //mask numbers (xxx)
xxx-xxxx

    v_e = v_e || window.event;
```

- Click the **Advanced** tab on the top of the widget. Then, enter the word **code** with a number in the **CSS ID** field. In this case, it should be number one since it's the first snippet. Also, enter the word **code** in the **CSS Classes** field.

Select **Apply**.

Edit Custom HTML

Content

Advanced

Update changes to page

APPLY

Advanced

Margin

PX

EM

%

REM

TOP

RIGHT

BOTTOM

LEFT

Padding

PX

EM

%

REM

TOP

RIGHT

BOTTOM

LEFT

Z-Index

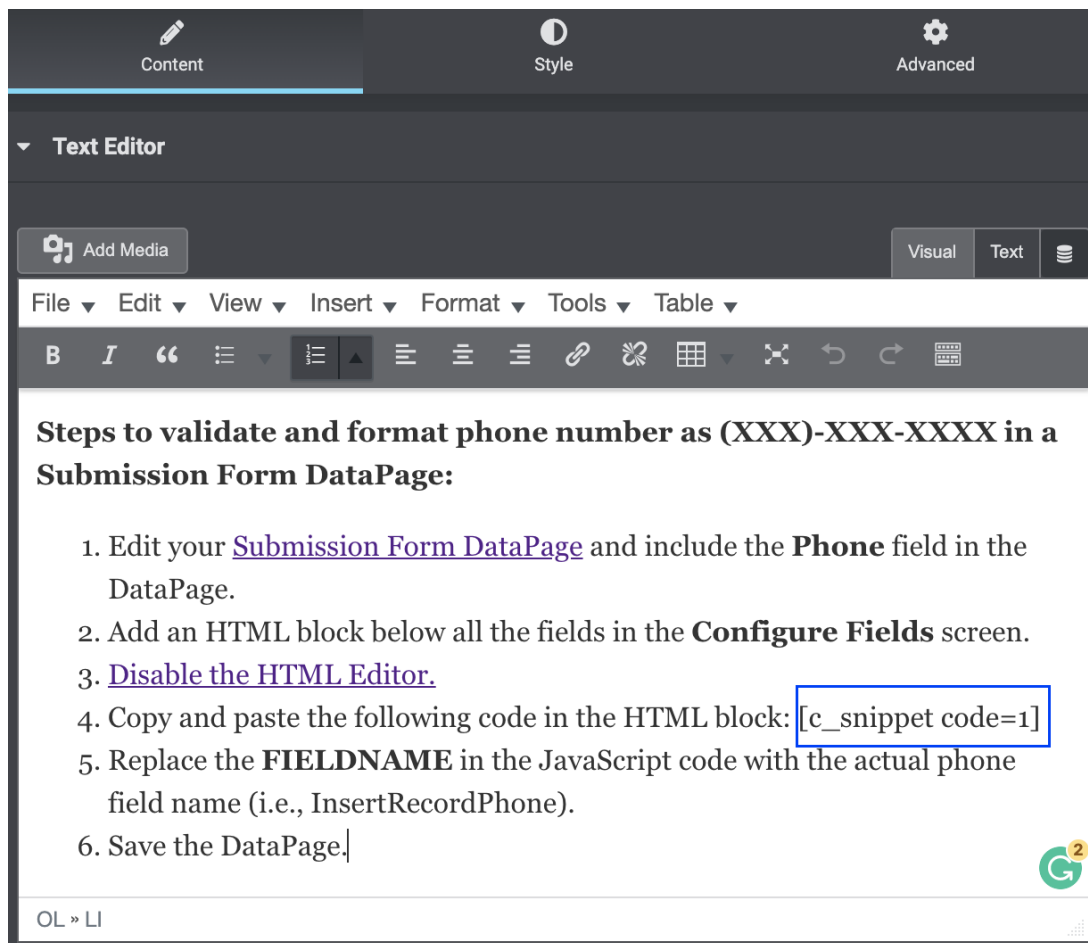
CSS ID

code1

CSS Classes

code

4. In the place of the text where the snippet code should show up, insert the shortcode **[c_snippet]** and add the attribute **code** followed by the number of the snippet. In this case it should be **[c_snippet code=1]**.



5. To insert another snippet, repeat the above steps but use different numbering, that is code2, `[c_snippet code=2]`, etc.

2.5. Hyphens and dashes

- In Caspio articles, you don't have to differentiate between hyphens, en dashes and em dashes. In all cases just use a hyphen.
- Use a space before and after a hyphen in the numbered lists, bullet points, etc. For example: 1. Template – the template to be used for PDF generation.
- Do not use a space before and after a hyphen in a sentence. For example: The information in your spreadsheet-numbers, formulas, and text-is stored in cells.
- Don't use a hyphen/dash:
 - In place of a bullet character in a list.
 - To indicate an empty cell in a table.

- Don't capitalize the first word after a hyphen unless the word is a proper noun.

2.6. Links

- The links should open in new tabs unless they are on the same howto.caspio.com domain.
- Use the links within the text whenever possible. Thanks to that:
 - Your text is much shorter.
 - A reader gets instant access to the description of the steps that may not be clear to him\her.
 - The difficulty of the text is diversified so that it is suitable for more and less advanced readers.

For example:

1. Create a [Chart DataPage](#).
2. Add a [Header and Footer](#) in the Configure Chart Options screen of the DataPage wizard.
3. [Disable the HTML Editor](#) in the Footer section.

2.7. Lists

3.8.1. Numbered lists

- Use a separate numbered entry for each step. It's OK to combine short steps that occur in the same place in the UI.
- Most of the time, include actions that finalize a step, such as 'Select Save'.
- Use complete sentences.
- Use imperative verb forms.
- Capitalize the first word in each step.
- Use a period after each step.
Exception: When instructing customers to type input that doesn't include end punctuation, don't use a period. Try to format the text so that the user input appears on a new line.

- If you need to make sure the user begins in the right place, provide a brief phrase at the beginning of the step. For example: On the **Design** tab, select **Header Row**.
- Use the following HTML tags in the Elementor text mode to number the steps. Otherwise, the formatting may get spoilt.

```
<li>
<ol>Text for step 1</ol>
<ol>Text for step 2</ol>
</li>
```

3.8.2. Bullet points

- **Capitalization:** Begin each item in a list with a capital letter unless there's a reason not to (for example, it's a command that's always lowercase). If necessary, rewrite the list item so that all items begin with capital letters or all items begin with lowercase words.
- **Punctuation:** In bulleted and numbered lists, end each list item with a period if:
 - Any item forms a complete sentence when combined with the list introduction that precedes the colon. Exception: Don't use periods if all items have three or fewer words or if the items are UI labels, headings, subheadings, or strings.
 - Any item by itself is a complete sentence.
 - Don't use semicolons, commas, or conjunctions (like and or) at the end of list items.
 - Use a lead-in line with the colon (:).
 - In case you don't use punctuation in a list, do not use a full stop after the last bullet point.
- **In UI:** Often lists are a series of radio buttons or checkboxes inside dialog boxes or settings pages. Unless they're complete sentences, don't use punctuation for each item in a list. If punctuation is necessary for clarity, make sure punctuation is used consistently in the list and in other lists within the same section or screen.

2.8. Navigation

Abbreviate simple sequences by using right-angle brackets. Include a space before and after each bracket, and don't make the brackets bold.

For example:

Select **Accounts** > **Other accounts** > **Add an account**.

2.9. Notes

- Use the notes when adding additional but vital information.
- Use the following HTML tags in the Elementor/WordPress text mode to get the proper formatting:

```
<blockquote><strong>Note:</strong>Text of a note</blockquote>
```

For example:

Note: *This article uses external HTML, JavaScript, or third-party solutions to add functionality outside of Caspio Bridge's standard feature set. These solutions are provided "as is" without warranty, support, or guarantee. The code within this article is provided as a sample to assist you in the customization of your web applications. You may need a basic understanding of HTML and JavaScript to implement successfully.*

Note: *Data import/export tasks are available in select plans. For more information, see [Caspio Plans and Pricing](#).*

- For a pricing note, use the following text:

Note: [Feature name] is available in select plans. For more information, see [Caspio Plans and Pricing](#).

Quick help: Formatting main text elements

This table presents the formatting of text elements that are most often used in the Caspio articles. It is based on MS Style Guide. For more elements, check [MS Style Guide](#).

Element	Convention	Example
Blades	<p>Avoid talking about blades. Instead, describe what the customer needs to do.</p> <p>When you must refer to a blade by name, use bold formatting for the name of the blade.</p> <p>Use sentence-style capitalization unless you need to match the UI.</p> <p>Don't include the word blade unless it adds needed clarity.</p>	<p>Select a specific operation to view details about that operation.</p> <p>In the Web app, provide a name for your site.</p> <p>Go to Audit logs to view the events that occurred against the subscription. On the Resource group blade, select Summary.</p>
Buttons, checkboxes, dropdowns, and other options	<p>Use bold formatting for the name.</p> <p>Use sentence-style capitalization unless you need to match the UI.</p> <p>If an option label ends with a colon or an ellipsis, don't include that end punctuation in instructions.</p> <p>Don't include the type of UI elements, such as buttons or checkboxes, unless including it adds needed clarity. If possible, refer to a button/checkbox etc. by its label only.</p> <p>If you need to use the word button/checkbox for clarity, it is lowercase.</p> <p>For example, references to an unnamed button such as Maximize may be clearer if you describe it as <i>the Maximize button</i>.</p>	<p>Select Save as (not Select Save as... or Select the Save as button).</p> <p>Select Allow row to break across pages.</p> <p>Clear the Match case checkbox.</p>
Command-line commands	Bold. All lowercase.	copy

Commands	<p>Use bold formatting for command names.</p> <p>Use sentence-style capitalization unless you need to match the UI.</p> <p>If a command label ends with a colon or an ellipsis, don't include that end punctuation in instructions.</p> <p>Don't include the word command unless it adds needed clarity.</p>	<p>Go to Tools, and select Change language.</p> <p>On the Design menu, select Colors, and then select a color scheme.</p>
Data types	<p>Bold.</p> <p>Capitalization follows that of the API.</p>	<p>DWORD</p> <p>Float</p> <p>HANDLE</p>
Database names	<p>Bold.</p> <p>The capitalization of database names varies.</p>	<p>WingtipToys database</p>
Device and port names	<p>All uppercase.</p>	<p>USB</p>
Dialog boxes	<p>Avoid talking about dialog boxes. Instead, describe what the customer needs to do.</p> <p>When you must refer to a dialog box by name, use bold formatting for the name of the dialog box.</p> <p>Use sentence-style capitalization unless you need to match the UI.</p> <p>If a dialog box label ends with a colon or an ellipsis, don't include that end punctuation in instructions.</p> <p>Don't include the words <i>dialog box</i> unless they add needed clarity.</p>	<p>Select Upload, and then select a file to upload.</p> <p>In Properties, select Details, and then select Remove Properties and Personal Information.</p> <p>In the Protect document dialog box, clear the Shapes checkbox.</p>
Error messages	<p>Sentence-style capitalization.</p> <p>Enclose error messages in quotation marks when referring to them in text.</p>	<p>We can't find a scanner.</p> <p>"Hmm ... looks like that's a broken link."</p>

		If you see the error message, "Check scanner status and try again," use Windows Update to check for the latest drivers for your device.
Examples	Use a comma after 'for example'. You can also use a colon after 'for example' when introducing a long example, the whole sentence, etc. Start the sentence with a capital letter, then.	For example, when managing customers and their orders, it is inefficient to repeat customer data with every order.
Feature names	Use sentence-case. Exception: use title-case in the titles. Use bold formatting.	Document generation Data import/export tasks
File attributes	All lowercase.	To remove the hidden attribute from all files in a folder...
File name extensions	All lowercase.	.mdb .doc
File names (user-defined examples)	Title-style capitalization. It's OK to use internal capital letters in file names for readability. Use bold formatting for file names in procedures if you're directing the customer to select, type, or otherwise interact with the name.	My Taxes for 2016 MyTaxesFor2016 Enter MyTaxesFor2016 .
Headers / headlines / headings / subheadings	Use sentence-case. Don't use end punctuation. Exception: use a colon when introducing numbered list or bullet points. Use imperative or gerund (-ing) form.	Adding Document Generation to your Caspio apps Map template fields
Key names, combinations, and sequences	Capitalize. Use bold formatting for key names and keyboard shortcuts in instructions.	Shift, F7 Ctrl+Alt+Del Alt, F, O Spacebar Select the F1 key. To open the Preview tab, select Alt+3 .

	Don't put a space around the plus sign (+) in keyboard shortcuts.	
Menus	<p>Avoid talking about menus. Instead, describe what the customer needs to do.</p> <p>When you must refer to a menu by name, use bold formatting for the name of the menu.</p> <p>Use sentence-style capitalization unless you need to match the UI.</p> <p>Don't include the word menu unless it adds needed clarity.</p>	<p>Go to Tools, and select Change language.</p> <p>On the Design menu, select Colors, and then select a color scheme.</p>
Panes	<p>Avoid talking about panes. Instead, describe what the customer needs to do.</p> <p>When you must refer to a pane by name, use bold formatting for the name of the pane.</p> <p>Use sentence-style capitalization unless you need to match the UI.</p> <p>Don't include the word pane unless it adds needed clarity.</p>	<p>Select the arrow next to the Styles gallery, select Apply styles, and then select a style to modify.</p> <p>If the Apply Styles pane is in your way, just move it.</p>
Placeholders (in syntax and in user input)	Italic	/v: version Enter <i>password</i> .
Pricing notes	<p>Use the note from the example.</p> <p>Do not bold the feature name.</p>	<p>Note: [Feature name] is available in select plans. For more information, see Caspio Plans and Pricing.</p>
Properties	<p>Usually bold.</p> <p>Capitalization varies.</p>	M_bClipped AbsolutePosition Message ID
Strings	When referring to strings in code, a document, a website, or UI, use sentence-style capitalization unless the text you're referring to is capitalized differently.	<p>Select "Now is the time."</p> <p>Find "font-family:Segoe UI Semibold" in the code.</p>

	Enclose in quotation marks.	
Tables	<p>Make entries in a table parallel. For example, make all the items within a column a noun or a phrase that starts with a verb.</p> <p>Use sentence-style capitalization for the table title and each column heading. Use sentence-style capitalization for the text in cells unless there's a reason not to (for example, keywords that must be lowercase).</p> <p>If there's a text that introduces the table, it should be a complete sentence and end with a period, not a colon.</p> <p>For the text in cells, use periods or other end punctuation only if the cells contain complete sentences or a mixture of fragments and sentences.</p>	N/A
Tabs	<p>Avoid talking about tabs. Instead, describe what the customer needs to do.</p> <p>When you must refer to a tab by name, use bold formatting for the name of the tab.</p> <p>Use sentence-style capitalization unless you need to match the UI.</p> <p>Don't include the word tab unless it adds needed clarity.</p>	<p>Select the table, and then select Design > Header row.</p> <p>On the Design tab, select Header row.</p> <p>Go to the Deploy tab. In the Configuration list, ...</p>
Titles	<p>Use title-case.</p> <p>Don't use end punctuation.</p> <p>Use imperative form.</p>	Upload Files and Images
URLs	<p>All lowercase for complete URLs.</p> <p>If necessary, line-break long URLs before a slash.</p> <p>Don't hyphenate.</p>	www.microsoft.com msdn.microsoft.com/downloads

User input	<p>Usually lowercase, unless case sensitive.</p> <p>Bold or italic, depending on the element.</p> <p>If the user input string contains placeholder text, use italic for that text.</p>	<p>Enter hello world</p> <p>Enter -p password</p>
Variables	<p>Treatment may vary. (According to MS Style Guide)</p> <p>Please bold in Caspio articles.</p>	<p>bEmpty, m_nParams, <i>file_name</i></p>

Table 1. Formatting text elements based on MS Style Guide.

SECTION 2

Help articles. A guide to writing standard online help articles on the Caspio HowTo site

Document control table

<i>Title</i>	Help articles. A guide to writing standard online help articles on the Caspio HowTo site
<i>Version number</i>	1.0
<i>Department</i>	Documentation Engineering
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<i>Version number</i>	<i>Revised on</i>	<i>Revised by</i>	<i>Changes made</i>

1. Scope

This procedure applies to the Documentation Engineering team. It includes the following information:

- Description of help articles
- Structure and formatting guidelines

2. About Help articles

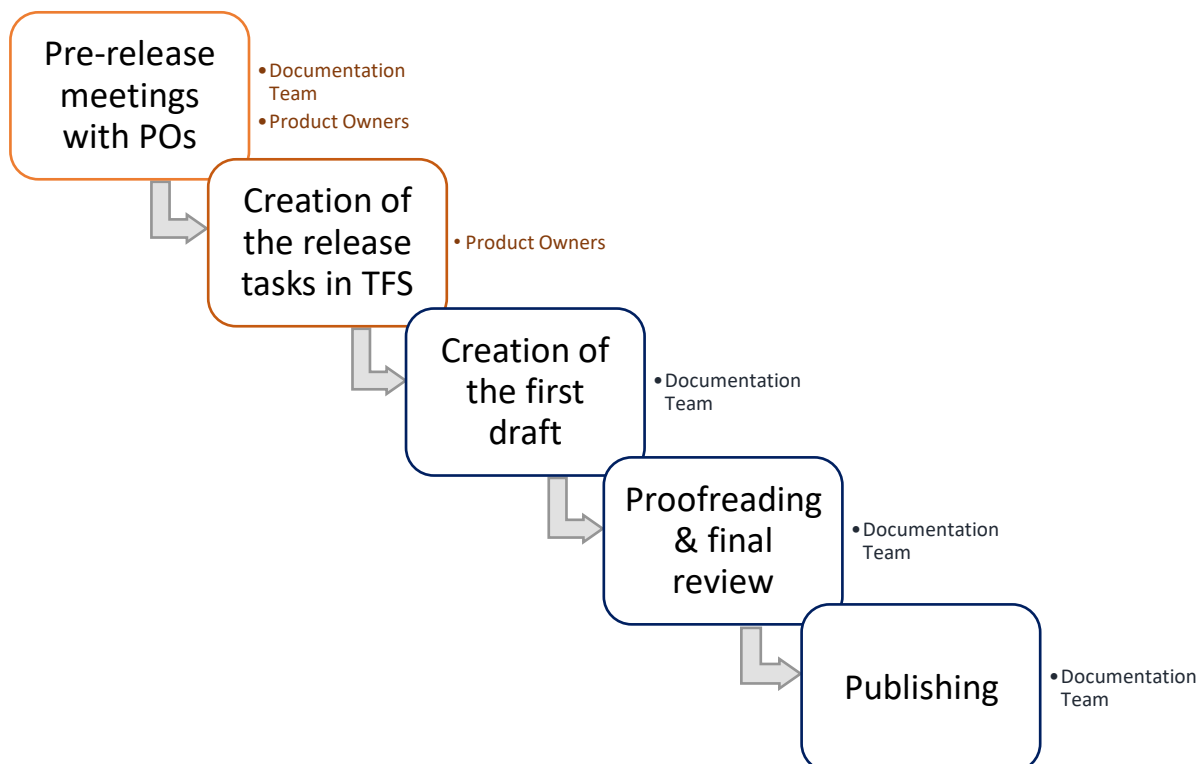
Help articles provide Caspio users with the knowledge of a given solution/feature. Most often they describe the latest Caspio solutions, so they constitute the first insight into the Caspio innovations.

Help articles provide the users with a description of UI, procedures, or a combination of both.

They are less specific than other HowTo articles, such as TechTips, FAQ, etc.

2.1. End-to-end writing process

Help articles are most often published on the day of a release. They are created in close collaboration with Product Owners as they have the best knowledge of the released features and solutions. The writing process looks as follows:



3. Help article structure and formatting

This section describes the structure and formatting of a standard Help article. It guides how to:

- Write [Base articles](#) – general/overview article with the links to the sub-articles
- [Describe UI](#)
- [Describe actions](#) – create step-by-step procedures

Writing a Help article may be a challenge. This stems from the fact that each feature requires a different approach – some of them need to be descriptions of UI, some need step-by-step procedures, whereas others are a combination of both. If you are going to write a Help article, assess its complexity and plan the document architecture beforehand. Product owners are the experts that will help you to do that.

If your article is long and complex, divide it into relevant sub-articles, for example: Parameters, System Parameters, Passing Parameters through Caspio, Displaying Parameters, etc.

3.1. Base article

This is the article that introduces the feature, provides main information about it and links to the other sub-articles. You can use it when dealing with complex articles with many sub-articles inside.

Structure and formatting

1. Title (for more information, see [Quick help](#))
2. Introduction:
 - Description of a solution – overview of a feature/solution, division into types, etc.
 - Standard formatting for WordPress/Elementor text
3. Links to the related sub-articles with an introductory sentence.

For example:

Read the articles below to learn more about <Feature name>:

[Link to sub-article 1](#)

[Link to sub-article 2](#)

3.2. Describing UI

Sometimes you need to focus more on the UI itself than the actions that a user can carry out. If you need to describe the UI, stick to the following guideline.

Structure and formatting

1. Title (for more information, see [Quick help](#))
2. Introduction:
 - Description of the solution – the most important information about the feature
 - Standard formatting for WordPress/Elementor text
3. (optionally/if applicable) Screenshot of a feature
4. Overview of a feature
 - in the form of bullet points – if there are elements that require a short description

For example:

The **App access** logs contain the following information:

- Log ID – unique ID of a log
- Date (UTC) – date and time in UTC format

- in the form of a header + text – if the elements require a longer description

For example:

Notification emails

Notification emails are sent to fixed email addresses, normally within your organization, to notify one or more people that a new submission is made. You may assign a Table-driven value to the Reply-to field from the dropdown list or choose to use the same email address as the one in the From field.

3.3. Describing actions

Stick to the guideline below when describing actions that a user needs to carry out in UI.

Structure and formatting

1. Title (for more information, see [Quick help](#))
2. Introduction
 - Description of a solution – the most important information about the feature/solution
 - Standard formatting for WordPress/Elementor text
3. (optionally/if applicable) Screenshot of a solution
4. Header introducing the procedure
 - Use sentence case.
 - Do not use end punctuation.
 - Use gerund (-ing) form. Do not use the 'Steps to...' structure.
 - e.g., Adding Document Generation to Your Caspio Apps
5. Steps of the procedure
 - Use numbered list for the steps of a procedure.
 - Use bullet points to introduce the options available.

For example:

1. Enter the Site URL of your Caspio account in the following fields:
 - **Authorized JavaScript origins** – use the **https://** format. For example, use **https://b1.caspio.com** if your account belongs to Site1.
 - **Authorized redirect URIs** – use the **https:///dp.asp** format. For example, use **https://b1.caspio.com/dp.asp** if your account belongs to Site1.

- When the step requires a longer description
 - Bold the step itself + add the text/description below.

For example:

1. Use the WordPress deployment method.

In your Caspio account, go to the DataPages Overview page of your application. Select the DataPage that you would like to deploy and click **Deploy**. Change the status of the deployment to **Enabled**. Select the **WordPress** deployment method. You have three deployment options here: Embed, iFrame, and SEO. Select the desired option, then copy and paste the code into the source of your WordPress post or page. To learn how to create SEO DataPages see [SEO Deployment Guidelines](#).

- Use screenshots to illustrate the steps. Do not overuse the screenshots – add them only when relevant and add value to a text.

3.3.1. Describing complex actions

Sometimes the procedure needs to be divided into many parts (for instance, when a process includes many steps that include many sub-steps inside). In such a case, stick to the following guidelines.

- Use the main header to name what the procedure is about (title of the procedure).
 - Use sentence case.
 - Do not use end punctuation.
 - Use gerund (-ing) form. Do not use the 'Steps to...' structure.
 - e.g., Adding Document Generation to Your Caspio Apps
- Use separate sub-headers to name particular parts of a procedure (title of the specific parts of the procedure) and introduce the numbered list of steps.
 - Use sentence case.
 - Do not use end punctuation.
 - Use imperative form. Do not use the 'Steps to...' structure.
 - e.g., Map the template fields

For example:

Adding Document Generation to your Caspio apps *[main header]*

Create a template *[sub-header 1]*

1. Select **Templates** from the sidebar navigation menu.
2. Click...

Map template fields *[sub-header 2]*

Next, map the template with an existing table in your account.

1. Select a table that will be used in the **Data source for mapping** field or select the **Click to map** link for any field on the right panel.
2. Select...

For more information about formatting, see the [General formatting guidelines](#). If in doubt, refer to [MS Style Guide](#).

SECTION 3

Release notes and Impacted areas. A guide to writing the Release notes and Impacted areas articles on the Caspio HowTo site

Document control table

<i>Title</i>	Release notes and Impacted areas. A guide to writing the Release notes and Impacted areas articles on the Caspio HowTo site
<i>Version number</i>	1.0
<i>Department</i>	Documentation Engineering
<i>Publication date</i>	
<i>Written by</i>	Karolina Dziewierz
<i>Approved by</i>	
<i>Revised by</i>	
<i>Revised on</i>	

Revision history

<i>Version number</i>	<i>Revised on</i>	<i>Revised by</i>	<i>Changes made</i>

1. Scope

This procedure applies to the Documentation Engineering team. It includes the following information:

- Description of the Release notes and Impacted areas articles
- Structure and formatting of the Release notes and Impacted areas articles

2. About:

2.1. Release notes

Release notes announce the latest features informing users about product development efforts.

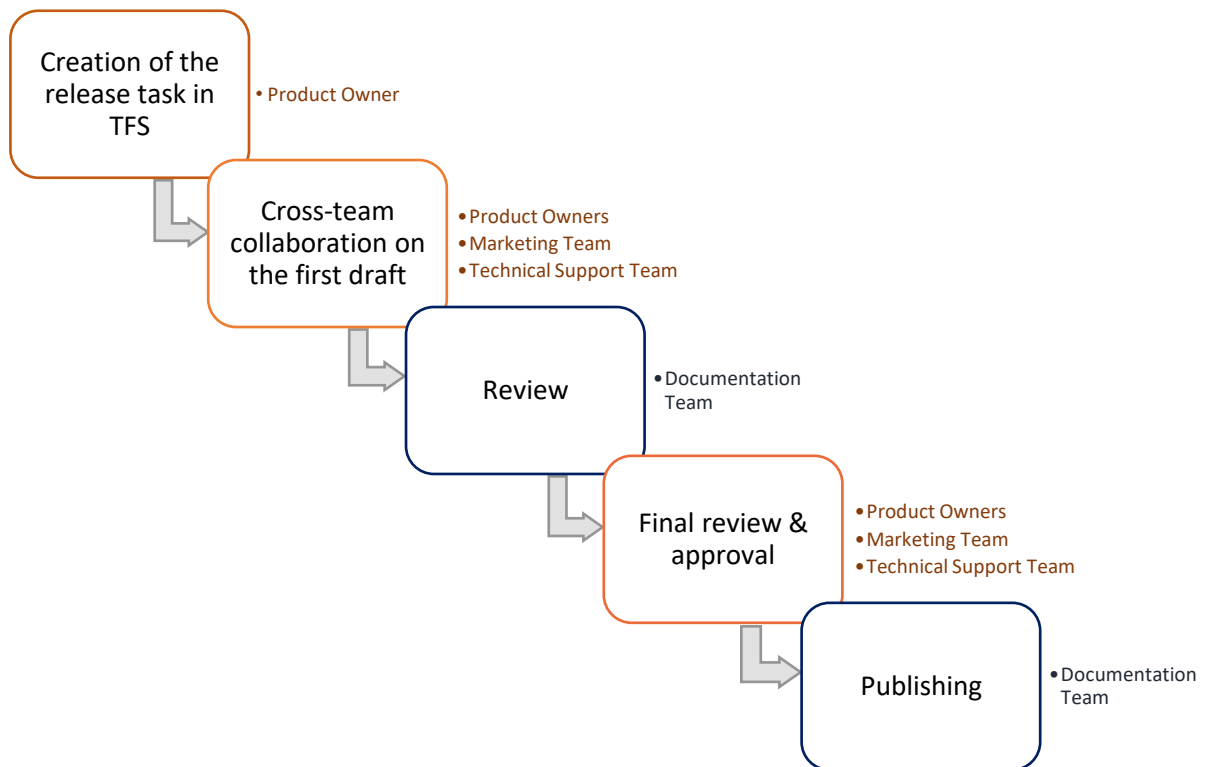
They are produced and published alongside the launch of a new software feature or a product update (for instance, recent changes, feature enhancements, bug fixes). They briefly describe a new product or changes included in a product update.

2.2. Impacted areas

The article specifying the impact of a particular release on the account users. It lists the product areas and functions that are affected by the release. It also suggests the recommended actions that will minimize the impact on the users' applications.

2.1. End-to-end writing process

The Release notes and Impacted areas articles are published on the day of a release. They are the result of a cooperation between the Product Owners, Marketing, Support and Documentation Teams. The writing process looks as follows:



3. Structure and formatting

3.1. Release notes

No	Structure element	Hints
1	Title	1.1. Form: <ul style="list-style-type: none"> • Caspio + release number
		1.2. Exact uses / examples: <ul style="list-style-type: none"> • Caspio 19.0, Caspio 27.0
		1.3. Formatting <ul style="list-style-type: none"> • Standard formatting for WordPress/Elementor titles
2	Date	2.1. Form <ul style="list-style-type: none"> • Month Day, Year
		2.2. Exact uses / examples: <ul style="list-style-type: none"> • April 20, 2021
		2.3. Formatting <ul style="list-style-type: none"> • Standard formatting for Wordpress/Elementor text

			<ul style="list-style-type: none"> • Left-align
3.	Header	3.1.	Form <ul style="list-style-type: none"> • 'Release Notes'
		3.2.	Formatting <ul style="list-style-type: none"> • Use this text in the Elementor/Wordpress text mode: <code><h2>Release Notes</h2></code>
4	Features description	4.1.	Form and formatting <ul style="list-style-type: none"> • Header + text • Header: <ul style="list-style-type: none"> ○ Recap of a change ○ Use title-case ○ Do not use end punctuation ○ Use this formatting in the Elementor/Wordpress text mode: <code><h4>Header<h4></code> • Text: <ul style="list-style-type: none"> ○ A few sentences about the feature/enhancement, etc. ○ Standard formatting for WordPress/Elementor text
3	(optionally/ if applicable) A screenshot of a solution	3.1.	Form and formatting <ul style="list-style-type: none"> • Please stick to the screenshot guidelines
4	Bug fixes	4.1.	Form <ul style="list-style-type: none"> • Table divided into three columns: ID, Area, Description
		4.2.	Formatting <ul style="list-style-type: none"> • Use the text below in the Elementor/Wordpress text mode: <pre><h3>Bug Fixes</h3> <div class="table-responsive"> <table class="table-responsive"> <thead> <tr class="info"> <th>ID</th> <th>Area</th> <th>Description</th> </tr> </thead> <tbody></pre>

			<pre> <tr> <td>Bug ID</td> <td>Area</td> <td>Description</td> </tr> </pre>
5	Feature request note	5.1.	<p>Formatting</p> <ul style="list-style-type: none"> Use the text below in the Elementor/Wordpress text mode: <pre> <h3>Have a Feature Request?</h3> Submit your ideas and feedback regarding product features in the <u>Caspio Ideabox</u>. </pre>

Table 2. Structure and formatting for the Release notes.

3.2. Impacted areas

No	Structure element	Hints
1	Title	<p>1.1. Form:</p> <ul style="list-style-type: none"> Impacted Areas + release number <p>1.2. Exact uses / examples:</p> <ul style="list-style-type: none"> Impacted Areas 11.0 <p>1.3. Formatting</p> <ul style="list-style-type: none"> Standard formatting for WordPress/Elementor titles
2	Note about a date of an update	<p>2.1. Form</p> <ul style="list-style-type: none"> Last update on + Month Day, Year <p>2.2. Exact uses/examples:</p> <ul style="list-style-type: none"> Last updated on February 8, 2018 <p>2.3. Formatting</p> <ul style="list-style-type: none"> Standard formatting for WordPress/Elementor text Sentence case Left-align
3	Introductory sentence	<p>3.1. Form and formatting</p> <p>Depending on the content, it may be:</p> <ul style="list-style-type: none"> A recap of what will be affected

		<ul style="list-style-type: none"> • An introductory sentence to the actions that a user should carry out to minimize the release impact, etc. • Standard formatting for WordPress/Elementor text
4.	The list of impacted areas *May also appear in tabular form	4.1. Form and formatting <ul style="list-style-type: none"> • Header + text <ul style="list-style-type: none"> • Header: <ul style="list-style-type: none"> ○ Recap of an impacted area ○ Use title-case ○ Do not use end punctuation ○ Use this formatting in the Elementor/Wordpress text mode: <code><h3>Header</h3></code> • Text: <ul style="list-style-type: none"> ○ A few sentences about the feature/enhancement, etc. ○ Standard formatting for WordPress/Elementor text

Table 3. Structure and formatting for Impacted areas.

For more information about formatting, see the [General formatting guidelines](#). If in doubt, refer to [MS Style Guide](#).

SECTION 4

Tech Tips. A guide to writing the Tech Tip articles on the Caspio HowTo site

Document control table

<i>Title</i>	Tech Tips. A guide to writing the Tech Tip articles on the Caspio HowTo site
<i>Version number</i>	1.0
<i>Department</i>	Documentation Engineering
<i>Publication date</i>	
<i>Written by</i>	Karolina Dziewierz
<i>Approved by</i>	
<i>Revised by</i>	
<i>Revised on</i>	

Revision history

<i>Version number</i>	<i>Revised on</i>	<i>Revised by</i>	<i>Changes made</i>

1. Scope

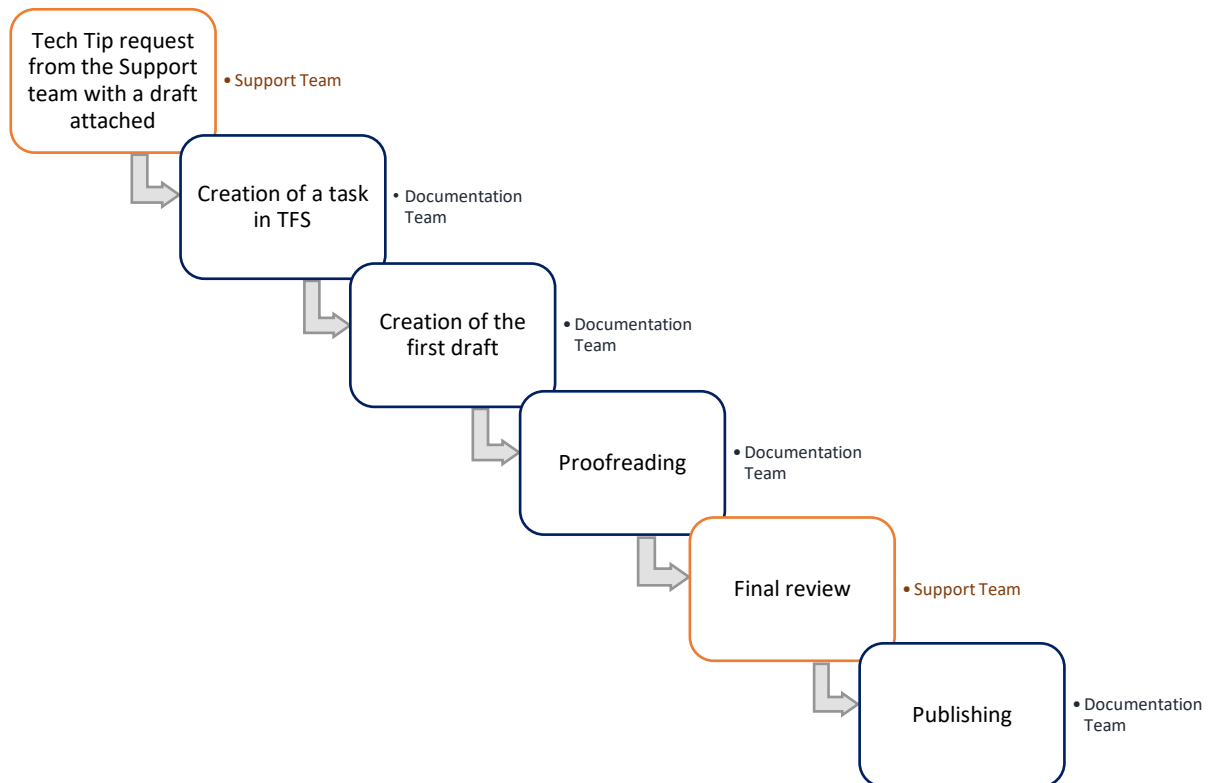
This procedure applies to the Documentation Engineering team. It includes the following information:

- Tech Tips overview
- Structure and formatting

2. About Tech Tips

Tech Tips provide Caspio users with step-by-step procedures on how to implement specific solutions and make the most out of their custom apps. Tech Tips are more specific than standard Help articles and require at least the basic knowledge of the Caspio platform from the user's side.

2.1. End-to-end writing process



2.2. Place of publication

Tech Tips are published on [Caspio HowTo site](#) > **Tech Tips**. They are divided into the following sections:

- Common customizations
- Advanced customizations
- How to use parameters?

- Social media

3. Tech Tip structure and formatting

This section describes the structure and formatting for a standard Tech Tip article.

No	Structure element	Hints
1	Title	<p>1.1. Form:</p> <ul style="list-style-type: none"> • Use verb in the imperative form • Do not use gerund -ing • Use Title Case (All Words are Capitalized Except for Minor Words) • Do not use a full stop at the end of a title <p>1.2. Exact uses/examples:</p> <ul style="list-style-type: none"> • e.g., Add PDF Download in Chart DataPages <p>1.3. Formatting</p> <ul style="list-style-type: none"> • Standard formatting for WordPress/Elementor titles
2	Introductory sentence	<p>2.1. Form</p> <ul style="list-style-type: none"> • Stick to one sentence whenever possible • If not possible – try to be as concise as you can • Please use the example from 2.2. <p>2.2. Exact uses/examples:</p> <ul style="list-style-type: none"> • In this article, we will guide you on how to add/create/apply... <p>2.3. Formatting</p> <ul style="list-style-type: none"> • Standard formatting for WordPress/Elementor text
3	(optionally/ if applicable) A screenshot of a ready solution	<p>3.1. Form and formatting</p> <ul style="list-style-type: none"> • Please stick to the screenshot guidelines
4	Introductory sentence to a step-by-step procedure	<p>4.1. Form</p> <ul style="list-style-type: none"> • Please use the example from 4.2. • Don't forget to use a colon (:) at the end <p>4.2. Exact uses/examples:</p> <ul style="list-style-type: none"> • Steps to add/create/apply... : <p>4.3. Formatting</p> <ul style="list-style-type: none"> • Use <h4>Steps to create/add/apply...</h4> header formatting in Elementor visual mode

5	Steps of a procedure	<p>5.1. Form</p> <ul style="list-style-type: none"> • Use numbering. See Numbered list to learn more. • Use imperative mood. • If there are sub-steps, use bullet points. Use a colon (:) in the lead-in line. See Bullet points to learn more. • Use full stop after each step. • Be as concise as you can. • Use screenshot(s) after a point only when it adds value to a text. • Use links within the text. <p>5.2. Exact uses/examples:</p> <ul style="list-style-type: none"> • e.g., Create an Authentication object with the user table above as the data source. • e.g., Save the DataPage. <p>5.3. Formatting</p> <ul style="list-style-type: none"> • Use the following html tags in the Elementor/WordPress visual mode to number the steps. Otherwise, the formatting may get spoilt. See Numbered list to learn more.
6	(optionally/if applicable) A note about using third-party solutions.	<p>6.1. Form and formatting</p> <p>Note: <i>This article uses external HTML, JavaScript, or third-party solutions to add functionality outside of Caspio Bridge's standard feature set. These solutions are provided "as is" without warranty, support, or guarantee. The code within this article is provided as a sample to assist you in the customization of your web applications. You may need a basic understanding of HTML and JavaScript to implement successfully.</i></p> <ul style="list-style-type: none"> • Use the following HTML tags in the Elementor/WordPress visual mode to get the proper formatting <pre><blockquote>Note:Text of a note</blockquote></pre> <ul style="list-style-type: none"> • See Code snippets to learn more.

Table 4. Structure and formatting for Tech Tips.

For more information about formatting, see the [General formatting guidelines](#). If in doubt, refer to [MS Style Guide](#).

SECTION 5

Troubleshooting. A guide to writing the Troubleshooting articles on the Caspio HowTo site

Document control table

<i>Title</i>	Troubleshooting. A guide to writing the Troubleshooting articles on the Caspio HowTo site
<i>Version number</i>	1.0
<i>Department</i>	Documentation Engineering
<i>Publication date</i>	
<i>Written by</i>	Karolina Dziewierz
<i>Approved by</i>	
<i>Revised by</i>	
<i>Revised on</i>	

Revision history

<i>Version number</i>	<i>Revised on</i>	<i>Revised by</i>	<i>Changes made</i>

1. Scope

This procedure applies to the Documentation Engineering team. It includes the following information:

- Troubleshooting article overview
- Structure and formatting

2. About Troubleshooting articles

Troubleshooting articles provide solutions to the common problems faced by the Caspio users.

2.2. Place of publication

Troubleshooting articles are published on [Caspio HowTo site](#) > **Troubleshooting**.

3. Troubleshooting article structure and formatting

Exemplary entry:

Problem

My SEO deployed DataPage is not working right. What could be the reason?

Solution

Provided that you have followed the [SEO deployment](#) guidelines, one or more of the following could help you resolve the problem.

Check if your page extension is correct.

For your server to process server-side scripts, page names must have correct extensions. Make sure the pages where you have deployed your SEO code end in .php, .asp or .aspx depending on your chosen deployment code. Also, for most servers the extension must be in lower case. (...)

3.1. Structure and formatting:

No	Structure element	Hints
1	Title (a problem in a nutshell)	<div>1.1. Form:<ul style="list-style-type: none">• Use title case• Bold formatting• No end punctuation</div> <div>1.2. Exact uses/examples:<ul style="list-style-type: none">• e.g., SEO Deployed DataPage Does Not Work</div> <div>1.3. Formatting<ul style="list-style-type: none">• Standard formatting for WordPress/Elementor titles</div>
2	Problem	<div>2.1. Form<ul style="list-style-type: none">• Header + text• Header<ul style="list-style-type: none">○ 'Problem'○ Bold the header○ No end punctuation○ Use this formatting in the Elementor/Wordpress text mode: <h3>Problem<h3>• Text<ul style="list-style-type: none">○ Be as concise as you can○ Stick to the General formatting guidelines○ Standard formatting for WordPress/Elementor text</div>
3	Solution	<div>3.1. Form<ul style="list-style-type: none">• Header + text• Header<ul style="list-style-type: none">○ 'Solution'○ Bold the header○ No end punctuation○ Use this formatting in the Elementor/Wordpress text mode: <h3>Solution<h3>• Text<ul style="list-style-type: none">○ Be as concise as you can○ Stick to the General formatting guidelines</div>

- Standard formatting for WordPress/Elementor text
- If you want to list actions that do not require a specific order, use bullet points

3.1.1. If you want to list the actions that require a specific order, use a step-by-step procedure:

- Use numbering. See [Numbered list](#) to learn more.
- Use imperative mood.
- If there are sub-steps, use bullet points. Use a colon (:) in the lead-in line. See [Bullet points](#) to learn more.
- Use full stop after each step.
- Be as concise as you can.
- Use screenshot(s) after a point only when it adds value to a text.
- [Use links within the text](#)
- Use the following HTML tags in the Elementor visual mode to number the steps. Otherwise, the formatting may get spoilt. See [Numbered list](#) to learn more.

```
<li>
<ol>Text for step 1</ol>
<ol>Text for step 2</ol>
</li>
```

3.1.2. If you need to describe a few longer points, use Header + text:

- Header:
 - Recap of a solution
 - Use sentence-case
 - Use end punctuation
 - Use this formatting in the Elementor/Wordpress text mode: <h4>Header<h4>
- Text:
 - Description of a solution
 - Standard formatting for WordPress/Elementor text

Table 5. Structure and formatting for troubleshooting articles.

For more information about formatting, see the [General formatting guidelines](#). If in doubt, refer to [MS Style Guide](#).

SECTION 6

FAQ. A guide to writing Frequently Asked Questions articles on the Caspio HowTo site

Document control table

<i>Title</i>	FAQ. A guide to writing Frequently Asked Questions articles on the Caspio HowTo site
<i>Version number</i>	1.0
<i>Department</i>	Documentation Engineering
<i>Publication date</i>	
<i>Written by</i>	Karolina Dziewierz
<i>Approved by</i>	
<i>Revised by</i>	
<i>Revised on</i>	

Revision history

<i>Version number</i>	<i>Revised on</i>	<i>Revised by</i>	<i>Changes made</i>

1. Scope

This procedure applies to the Documentation Engineering team. It includes the following information:

- FAQ overview
- Structure and formatting

2. About FAQ

Frequently asked questions answer the questions that are most asked by the customers. The well-written FAQ section brings many benefits to a company, such as:

- Improved clients' satisfaction
- Increased traffic to a website
- Improved site visit time

While writing FAQs, be concise, insightful and link back to the Caspio features. Try to avoid wordy answers whenever possible.

2.2. Place of publication

FAQ articles are published on [Caspio HowTo site](#) > **FAQs**. They are divided into the following sections:

- Data transfer
- Report DataPages
- Deployment
- SEO deployment
- Web forms
- Import and export
- Data import/export tasks
- Authentication
- Parameters
- Account management

If there's a need, please add a new section to embed your FAQ entry.

3. FAQ structure and formatting

Exemplary FAQ entry:

What is my Caspio site number?

Caspio operates on several server farms to power its customers' applications. Caspio site number defines which site your account is on. It may be helpful, for example, when viewing <http://status.caspio.com>, as you need to know which report applies to your account.

You can view the site number of your account on the **Account Settings** screen. Login to your Caspio Bridge account and select **account** > **Account Settings** from the upper menu bar.

3.1. Structure and formatting:

No	Structure element	Hints
1	FAQ question	<ul style="list-style-type: none">1.1. Form:<ul style="list-style-type: none">• Use sentence case• Use question mark at the end• Use bold formatting1.2. Exact uses/examples:<ul style="list-style-type: none">• e.g., Why is the sorting of my numbers wrong on the results page?1.3. Formatting<ul style="list-style-type: none">• Standard formatting for WordPress/Elementor titles (sentence case)
2	Answer	<ul style="list-style-type: none">2.1. Form<ul style="list-style-type: none">• Be as concise as you can• Stick to the General formatting guidelines2.2. Exact uses/examples:<ul style="list-style-type: none">• This typically stems from the fact that Text 255 has been chosen as the data type of your number field. Perhaps, you imported the data through a CSV file, and all CSV fields are treated as text. To fix this issue, open your Table Design, change the field's data type to Number, and then save the table design.2.3. Formatting<ul style="list-style-type: none">• Standard formatting for WordPress/Elementor text

Table 6. Structure and formatting for FAQ.

For more information about formatting, see the [General formatting guidelines](#). If in doubt, refer to [MS Style Guide](#).