

Technical Writing Guidelines and Standards

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Overview

This document explains the writing standards followed by Technical writers while creating articles in ServiceNow. These standards are used for communicating the Solvas|Digitize product knowledge to end-users with a simple and straight forward language.

Following are the goals of an article:

- Crisp and clear content.
- Ready to help by anticipating and understanding the client real-time needs and offer easy to understand information.
- Articles must be like everyday conversations and yet stick to the point of key takeaways from the article.

Solvas|Digitize Article Types and Audience

With the current state of documentation progress, Technical Writing team are in a process of addressing the below types of articles:

- **Articles for Current Features:** Articles created for the ongoing features in the Digiboard development sprints.
- **Articles for Backlog Features:** The features/topics that were already available but do not have articles to refer to in case of support needed.

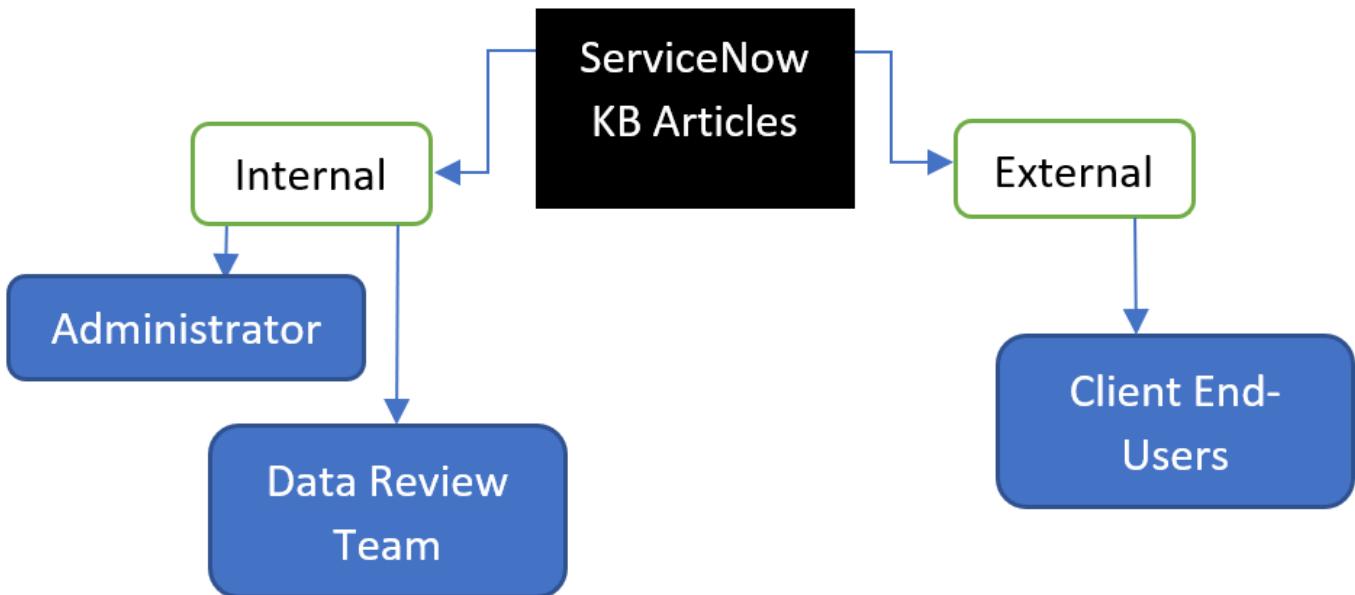
Note: All the ServiceNow articles will be addressed as **KB articles** irrespective of the audience, type, and style.

Below are the areas where articles are needed:

- Internal – Administrator and Data Review team
- External – Clients with end-user access

Following is the audience list that needs to be addressed:

- Client End-Users
- Client/Deloitte Administrators
- Deloitte Data Review team



Solvass|Digitize has two types of articles:

- **Concept:** explains a feature, process, etc.,
- **How-To:** provides instructions for performing a task or troubleshooting an error.

Writing Guidelines and Styles

Technical Writers must adhere to the below guidelines while working on an article. These guidelines will help in maintaining consistency in writing style across the team.

Article Styles

Titles and Headings

Titles and Headings of content should convey as much information as possible about the text that follows next to help readers locate information quickly.

In Solvass|Digitize articles:

- Use Title-Cased Capitalization.
- Make sure the Titles and Headings describe the summary of a concept or an action.

Some examples of **Titles** are:

- About Data Views
- Understanding Mapping Field Value Rules

Some examples of **Headings** are:

- Create a New User

- Types of Reconciliation Statuses

Font Styles:

- Titles font must be Arial and size must be 24pt
- Headings font must be Verdana and size must be 13.3333px and in Bold style. This is the tag to be used in the source code: `<p>Sample</p>`

Sample

Note: The CSS will apply the default font styles for headings. You must edit the Heading font size to 20px manually in the source code.

Sub-headings

Use sub-headings when you want to divide your topic into more than one sub-topics. Make the sub-topic a logical part of the whole topic.

In Solvas|Digitize articles, use title case for sub-headings.

Some examples of **Sub-headings** are:

- Understanding Reconciliation (Heading)
 - Reconciliation Statuses (Sub-heading)

Font Styles:

- Font: Verdana, Font size: 16px.
- This is the tag to be used in the source code: `<p>Sample</p>`

Sample

Body Text

The body text includes a brief description of the topic. It explains what the feature is about, why the user must use the feature and what all actions that the user can perform using the feature.

Example: Solvas | Digitize uses Okta, an integrated identity, and mobility management service, to securely connect you with the Solvas applications from any device, anywhere, at any time. The Multi-Factor Authentication (MFA) in Okta ensures that you have a better experience, tracking, and increased security. If you are logging in to Okta for the first time, you must activate your Okta account, and then set up the MFA.

Sample code: `<p>Sample text</p>`

Tables

Use tables to represent information instead of long paragraphs or sentences. This makes it easier for the audience to scan for information quickly.

Dos for tables:

- Use a border of 1 unit.
- Bold the table headings.
- Keep the table alignment as None. This keeps the table left-aligned.

Don'ts for tables:

- Do not use Border color and Background color for the table.
- Do not use any specific alignment for rows.

Tip: Use the View Article feature and check the table after you insert it. Tables look different in the editing window and the view article window.

Images

Use **Images** in the articles to provide the visual representation of multiple areas of an application explained in a concept or instructions. Make sure the images complement the ideas expressed in your text.

Ensure an image included in an article meets the below standards:

1. Capture the image via SnagIT. Make sure you capture the entire application screen. In special cases, capture the required window only.
2. Mark appropriate highlights, callouts. See the **Image Highlights** section.
3. If you find client sensitive data, use **Blur** to mask the data.
4. Use PNG or JPEG format to save the final image.
5. Insert the image in an article using the **Insert/edit image** option.
6. Set the width, height and border thickness. See the **Image Dimensions** section.

Image Highlights

- Use Red box (shape color RGB#FC4242) with thickness **4 units** to highlight the UI elements such as tabs, pop-up screens, menu bars, etc. Clear the **Shadow** checkbox.
- Use text to mention callout numbers or additional information. Make sure the font is Arial Black, Italic style, size 24 and font color #86BC25.
- Use Red arrow shapes to point a specific item in the image.

Image Dimensions

Location	Dimensions
Description	W: 800; H: 550; BT: 2
Steps or random list	W: 500; H: 250; BT: 2
Notes or Info	W: 350; H: 200; BT: 2

Note: The height of an image can have a tolerance of 50 units. For example, 250~300 units depending upon the clarity and fitment.

Example Image:

The screenshot shows the Solvas|Digitize application interface. At the top, there is a navigation bar with links for Home, Incoming, Data Views, Reports, Help, and Data Views. The main title is "Solvias | Digitize". Below the title, there are dropdown menus for Client01_a, Loan Notice, and (All), and user information for Aucharla Venkatesh and QATest. A red box highlights the "Loan Notice Documents" tab in the navigation bar. The main content area displays a mapping grid titled "Mapping - Target" and "Mapping - Source". The "Mapping - Target" section has a header row with columns: (None), Administra..., Agency Na..., Agent Cont..., All In Rate, Asset Code, Base Rate, Client, Currency, Record Ext..., Dataset ID, Entity Code, Entity ID, Facility, Filename, Global. Below this is a data grid with multiple rows, each containing a checkbox, a target name like "LoanIQ", and various source details. One row's "Target" column is highlighted with a red box. A red arrow points from the text "Sample Text" to the "Target" column of the first data row. The "Mapping - Source" section has a similar header and data grid. At the bottom of the grid, there are buttons for Page, Reset Filters, and a message indicating "Displaying items 1 - 18 of 18". The status bar at the bottom left shows "Ready" and the version "Solvias|Digitize 1.14.0".

Notes and Info

Include Notes, Tips and Additional Information in the Solvas|Digitize articles at appropriate instances.

- Use **Note** if you wish to alert users with special information related to a concept or an action item that would not fit in the main text. Make sure a **Note** does NOT provide any additional actions and used for informational purposes only.
- Use **Info** if you wish to provide additional information related to a concept or an action item. It can be used to provide alternate options to achieve a task, tips or caution the users.

In Solvas|Digitize articles:

- Use a single table cell (1x1) to include a **Note** or **Info**.
- In **Table Properties**, make sure you set the table cell border to 1 unit.

Examples:

Note Example

Note: If the application redirects you to the next page, your uploaded data in the wizard was saved successfully.

Info Example

Info: You can also use this procedure to copy a different format file and save it in the same location.

Cross-references

Use cross-references to direct users to related information that will help them understand a concept/procedure in detail.

There are two types of cross-references:

- Cross-reference to an external article
- Cross-reference to a topic with in the same topic

In Solvas|Digitize articles:

- You must include the cross-references to the **published** articles only.
- You must copy the **permalink** of an article to which you want to refer to and insert its link in your article at an applicable location.

Note: The **Permalink** of an article is available at the bottom of the article in the **CSM** portal.

Tip: Make sure you double-check the cross-reference to confirm the right article is referred and the hyperlink is working as expected. Of all the things, an invalid cross-reference can be frustrating for users.

Example:

Good	Bad
For information about Reconciliation Statuses, see Reconciliation Statuses .	For information about Reconciliation Statuses, see Reconciliation Status column in the view.

You can also include the cross-reference to a topic with in the same article.

An article can have a main topic and more than one sub-topic. If you want to refer to a sub-topic anywhere else in the article, you can use a hyperlink. However, this is not available as a formatting option in ServiceNow. You must make changes in the source code to create this internal cross-reference.

For example, your article has the following structure:

Providing Access to SharePoint (heading)

- Checking User's Access to SharePoint (sub-heading)
- Raising an Access Request (sub-heading)
- Resetting User's Password (sub-heading)

You want to refer to Raising an Access-Request sub-topic in the Checking User's Access to SharePoint sub-topic. For this, you must:

1. Create a `<a>` tag in the Heading tag.

2. Insert the created cross-reference.

Creating a `<a>` tag in the Heading tag

1. Go to the source code and locate the heading (H tag) that you want to refer to.

2. Insert a `<a>` tag before the text starts in the tag. It looks like the following tag.

```
<h2 style="box-sizing: border-box; font-family: SourceSansPro, 'Helvetica Neue', Arial; font-weight: 500; line-height: 1.1; color: #2e2e2e; margin-top: 18px; margin-bottom: 9px; font-size: 27px;"><strong style="box-sizing: border-box;"><a name="Raising an Access Request"></a>Raising an Access Request</strong></h2>.
```

1. Check the editing window. If you see an anchor image before the heading, the `<a>` tag is successfully inserted. See the following image for reference.

 Raising an Access Request

Inserting the Created Cross-reference

1. In the source code, locate where you want to insert the cross-reference to the topic.

2. Insert the `<a>` tag that you created along with the `href` attribute. The tag looks like this:

`<p>See Raising an Access Request </p>`. The result in the editing window looks like the following image:

See [Raising an Access Request](#).

3. Save the article and click View Article to check the cross-reference.

4. Verify if the cross-reference works as expected.

Note: The `href` should start with a `#` followed by exactly how it is in the `<a>` tag of the heading.

General Topics

Introduction Content

The introduction should lead the user into an article. It should make the users understand the purpose of the article and the tasks they will achieve using the information in the article.

Example:

Mapping Field Value rules in Solvas|Digitize assign values to fields using the source-target principle. The rules populate the target fields with a defined value if the source fields match with the value in the rules. Mapping Field Value rules assign the target value to all the transactions with the same source value. You can create Mapping Fields Value rules using the Mapping - Target and Mapping - Source buttons in any View on Data Views.

Procedures Content

Follow these guidelines while writing tasks. Most KB articles typically involve a task except for concept-based articles.

Formatting:

Tip: Formatting numbered lists in tasks involves editing the html source code. Some knowledge of html tags will help.

- Use the numbered list option for writing steps in a procedure.



- To nest another ordered or unordered list in the main ordered list, modify the source code as shown in the following image. That is, nest the `` or `` tag in the `` tag that must contain the sub-list.

```

<li><span style="font-family: verdana; font-size: 10pt;">Select the following options:</span>
<ul style="list-style-position: inside;">
<li><span style="font-family: verdana; font-size: 10pt;"><strong>Select the client</strong>: Select the relevant client </span></li>
<li><span style="font-family: verdana; font-size: 10pt;"><strong>Select the request type</strong>: Add New Contact(s)</span></li>
<li><span style="font-family: verdana; font-size: 10pt;"><strong>Provide the contact information</strong>: Yes</span></li>
</ul>
</li>

```

2. Select the following options:

- **Select the client:** Select the relevant client
- **Select the request type:** Add New Contact(s)
- **Provide the contact information:** Yes

- To insert an image corresponding to the step, place the image tag before closing the `` tag. Apply the same principle for step consequences too.

```

<li style="list-style-position: inside;">
<li><span style="font-family: verdana; font-size: 10pt;"><span style="color: #343d47; font-family: Calibri, sans-serif; font-size: 14.6667px;">In a web browser, enter the URL of the Okta application as&nbsp;<a href="https://deloitteadvisory.okta.com/app/UserHome" rel="nofollow">https://deloitteadvisory.okta.com/app/UserHome</a> and click <strong>Enter</strong>.&nbsp;</span></span>
<p><span style="font-family: verdana; font-size: 10pt;"><span style="color: #343d47; font-family: Calibri, sans-serif; font-size: 14.6667px;">The <strong>Sign In</strong> screen appears.&nbsp;</span></span></p>
<p></p>
</li>

```

1. In a web browser, enter the URL of the Okta application as <https://deloitteadvisory.okta.com/app/UserHome> and click Enter.
The Sign In screen appears.

Language

- Use simple sentences instead of complex and compound sentences.
- Write only one action in a step. If there is more than one action in a step, make it two steps.
- Use a leading statement before you start the steps.

Example: To create a mapping field value rule:

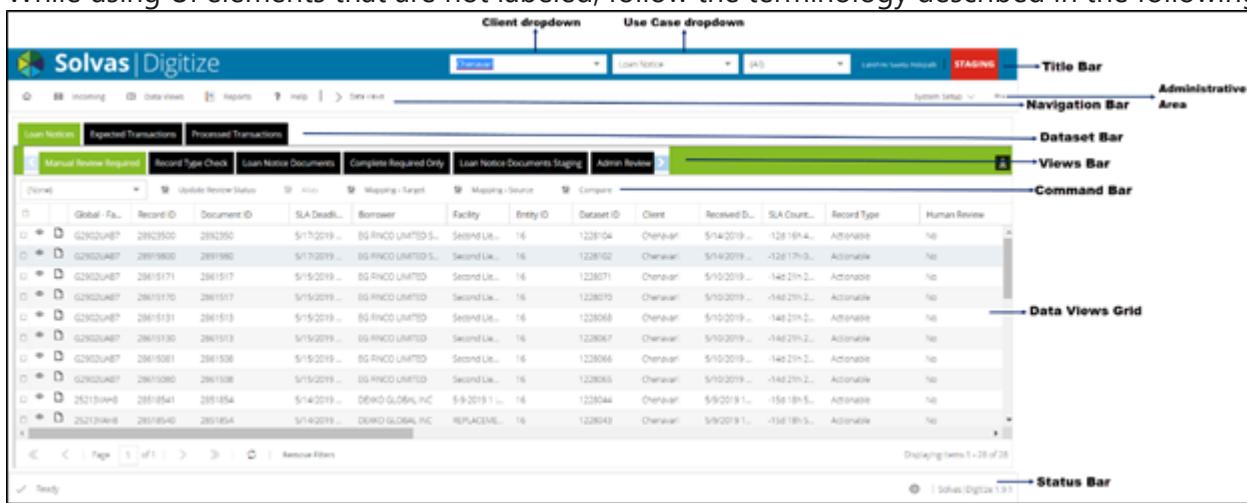
1. Select the use case from the Use Case drop-down.

2. Click Data Views.

- If you must indicate where the user should perform the action in the step, mention that before the action.
- Example: On the Data Views screen, click Manual Review Required.
- Mention the step consequence after each step and an image if necessary. Do not use images for obvious consequences.
- If there is more than one way to achieve a task, include the simplest and easiest way in the task.
- Include the result at the end of the task.

UI Elements

- Bold the UI elements and follow the same casing as it appears in the UI.
- For general words that have a distinctive meaning in Solvas|Digitize, use title case.
- Example: **View**
Administrators can configure various Views and define the Applicability Criteria for them.
- While using UI elements that are not labeled, follow the terminology described in the following image.

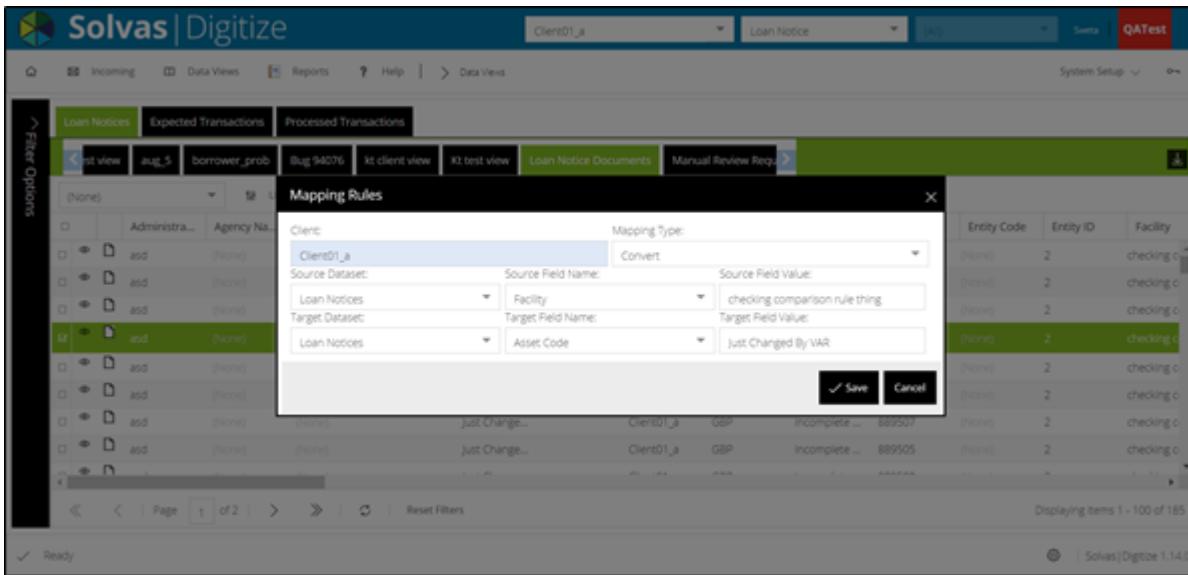


- When you click a button/icon, refer to the resultant page as a 'screen'.

Example: Click the eye icon, the **Data Review** screen is displayed.

- When a pop-up screen is displayed over a screen, call it a 'window'.

Example: Click **Mapping - Target**. The **Mapping Rules** window is displayed.



- Refer to parts of a screen as panes.

Example: On the **Configuration** pane, click **SLA Rules**.

Grammar

Articulate the KB articles keeping the following Grammar rules:

- Active Voice:** Always use active voice sentences in the articles. Avoid using passive voice sentences as they can be confusing and unclear.

Example

Select a user and click **Delete**.

- Person:** Use the second person, that is, 'You' for any kind of end-user of the document.

Example:

You can raise an SSTS ticket.

- **Tense:** Keep the sentences simple and always in the Present tense. write the steps as if you are performing while writing the document. Avoid using past or future tense as much as possible.

Example

You can create a new folder.