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| IT Training Quick Reference  Quick Reference (QREF) Template |  |
|  |  |

1. Heading 1
   1. Heading 2
      1. Heading 3
2. Level 1
   1. Level 2
      1. Level 3

Body Text

**NOTE:**

* **TIP:**
* Bullet 1
  + Bullet 2

Table of Contents

[Heading 1 1](#_Toc468953435)

[Heading 2 1](#_Toc468953436)

|  |  |  |
| --- | --- | --- |
| Icon | Name | Description |
|  | **Text** | Text |
|  | **Text** | Text |
|  | **Text** | Text |

Graphic Center Style

Center Picture Caption

Graphic Indent Style

Indent Picture Caption

1. Document Standards Overview

Include an overview statement that describes the content of the quick reference guide. For example:

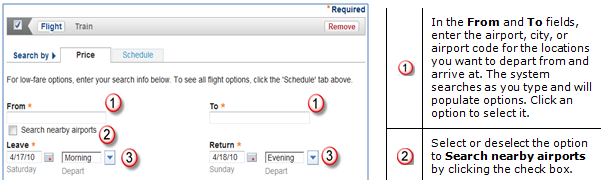
This document serves as a template to create Quick Reference (QREF) guides for technical application instructions at the firm. Save this template as a new document to create your QREF.

Below is a list of built-in styles, and also provided are documentation standards that all QREFs should follow for consistency. Also, a table of contents should be included for any QREF that exceeds four pages. It is important to have consistent formatting of text and elements throughout a document.

1. Heading 1
   1. Heading 2
      1. Heading 3

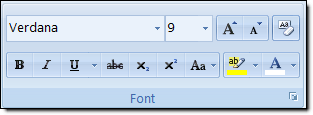
**NOTE**: If the heading level 3 text begins with the word “To” you should include a colon at the end of the text, e.g. **To save a document:**. However if the heading level 3 is just standalone subheading, no colon is needed, e.g. **Saving New Documents**.

1. Documentation Standards
   1. General Guidelines
2. Keep each QREF simple, relevant to the topic, and consistent in writing style and formatting.
3. For the QREF title, try not to include the application name (for example, use **Encrypting CD-ROM Discs**, instead of **Using Pointsec Protector**; however, **PowerPoint Best Practices** is okay for firm-standard applications).
4. Provide an introduction or overview for the QREF.
5. Use a labeled screen capture with accompanying table to describe the elements of a window.

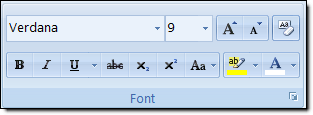


* 1. Numbered Steps

1. Start all instructions with an action (example: Click, Type, Close).
2. Use actions for numbered steps; do not use action results (example: *The XYZ dialog box displays*) as a step by itself.
3. Italicize action results (example: *The XYZ dialog box displays*).
4. Include an orientation for the action (example: Click **Labels** in the **RG Label** group on the **Home** tab of the ribbon).
   1. Formatting
5. Use a vertical pipe to separate commands, which should be bold and capitalized (example: Click **Office Button | Open**.)
6. Format tab/group/button names using initial-caps and bold (*Example*: Click **Paste** in the **Clipboard** group on the **Home** tab of the ribbon.)
7. If referring to the File tab in a stand-alone step, use “Click the **File** tab.” If referring to the File tab and combining steps, use “Click **File | Print**.”
8. For an action on a button, don’t use the word “button” and consider a screen shot. *Example*: Click **New**. (not “Click the **New** button”)
9. Use a table to describe a group of buttons (see table structure in left column).
10. For keystroke combinations, use a plus sign with no spaces; also bold and initial-cap the keys (example: Press **Ctrl+Z** to undo the last action).
11. Bold text that students will type in an exercise (*Example*: Type **benefits** into the Password field).
    1. Graphics
12. Add a graphic one of two ways below, as appropriate for the QREF, and consistently throughout the document:
    1. Use the **IT Graphic Center** style to center-align and apply spacing above and below:



* 1. Use the **IT Graphic Indent** to left-align and create space (6 pt. if needed):



1. If a figure number is required, place it directly underneath the graphic (**Shift+Enter**).
2. Refer to the **SnagIt Settings** section of this guide for how to format graphics.
   1. SnagIt Settings

Configure SnagIt to have these default screen capture effects:

|  |  |  |
| --- | --- | --- |
| Effect | Settings | Use |
| **Shadow** | Shadow depth: 15 pixels  Shadow color: black  Position: lower right | Apply to all screen captures, except when using Torn Edge or Beveled Edge effect |
| **Border** | Outline width: 1 pixel  Outline color: black |  |
| **Torn Edge** | Effect size: 1  Border width: 0  Shadow color: black  Shadow position: same as torn edge  Shadow depth: 15 pixels | Apply to screen captures where a portion of the graphic has been excluded (example: a portion of a dialog box or screen has been captured). |
| **Beveled Edge** | Use the default Beveled Edge effect in the Image Style drop-down gallery: 5th row, last column.    Bevel size: 4  Borders: Bottom, Right  Outline:0 px (R:1, G:127, B:127)  Shadow: 15 | Apply to screen captures where only a button has been captured. |
| **Shapes** | Shape: rectangle  Color: red  Border: 3  Drop shadow: on or off; personal preference | Use to call attention to a particular section or button in the screen capture. |

* 1. Word Usage

1. Minimize the use of “you.”
2. Use “button” (not “command”; example: The **Bold** button is located in the **Font** group).
3. Use “click” (not “click on”).
4. Use “dialog box” (not “window”; example: *The Save As dialog box displays*).
5. Use “displays” (not “appears” or “opens”; example: *The following message displays*).
6. Use “drag” (not “drag and drop”).
7. Use “page” or “screen” (examples: *The time entry page displays; the time entry screen displays*).
8. Use “type” (not “enter”; example: Type your password).
   1. Spelling and Grammar
9. Hyphenate these words: double-click, drop-down, e-learning, e-mail, mini-toolbar, right-click.
10. Spell these as one word: checkbox, toolbar.
11. Spell out numbers one through nine, except when specific to an exercise.
12. Spell Quick Access Toolbar using initial-caps.
13. Do not capitalize ribbon (example: Click the **Home** tab of the ribbon).

Microsoft Teams | Start a Chat Conversation

1. Overview

This Quick Reference explains how to start a one-on-one or group chat conversation in Microsoft Teams.

* 1. Start a Chat

1. Click the **Chat** tab on the left navigation bar.

The Chat screen displays.

1. Click **New Chat** at the top of the Chat pane.

The New Chat window displays.

* TIP: Press Shift+Enter to add a new line without sending.

[Insert Screenshot Here]

* 1. Start a Group Chat

1. Click **New Chat**.
2. Type multiple names into the To field, separated by commas.
3. Click the **Down Arrow** next to the group name field to name the group chat (optional).
4. Type your message and press Enter to send.

NOTE: Group chats allow file sharing, scheduling meetings, and calling all participants.