

# ECIS Style Guide

September 2017

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# OVERVIEW

## 1.1 About this guide

This style guide contains suggested formats for all ECIS documentation, communications and web content. Along with the fast-paced changing nature of technology, so too does documentation change, which makes this a living document with frequent updates. Everyone is invited to participate in the contents of the document and determining how we want ECIS to be seen through our communications products.

## 1.2 Purpose of this guide

The purpose of this guide is to offer guidelines for consistency for our documentation, communications, and web content. Our written communications are often the face of OCTO and ECIS and we want to make a good impression by providing professional and consistent content.

## 1.3 How to use this guide

This guide should be used as a reference for creating communications products, documentation, and web content for ECIS. All sections are laid out in the Table of Contents.

## 1.4 Sections in this guide

This guide contains the following sections:

[Design Elements](#)

[Grammar, Mechanics and Formatting](#)

[Voice and Tone](#)

[Accessibility](#)

[Technical Publications](#)

# DESIGN ELEMENTS

UI/UX, or User Interface/User Experience, involves creating an interface on the web or in an application that is designed to enhance an end user’s experience. The same rules apply to documentation. Today’s basic document design is easy to read with large enough fonts and plenty of white space and graphical content to maintain a reader’s interest.

This section contains guidelines on how to make documents more readable and enhance the user reading experience.

## 2.1 Logos

Logos should be used for official communications only, including documentation and web content. Guidelines for using District, OCTO, and ECIS logos are as follows:

- Use these logos on a white or grey background
- These logos should not be displayed on the same color background
- These logos should not be recolored or altered
- When creating public-facing information, use all three logos
- Use logos for official internal and external communications only



Figure 1 OCTO logo



Figure 2 District logo

Placeholder  
ECIS logo

## 2.2 ECIS color palette

The following color palette was created using the blue and green in the OCTO logo and the light blue on the OCTO website. The remaining colors are specific to ECIS’s color palette.

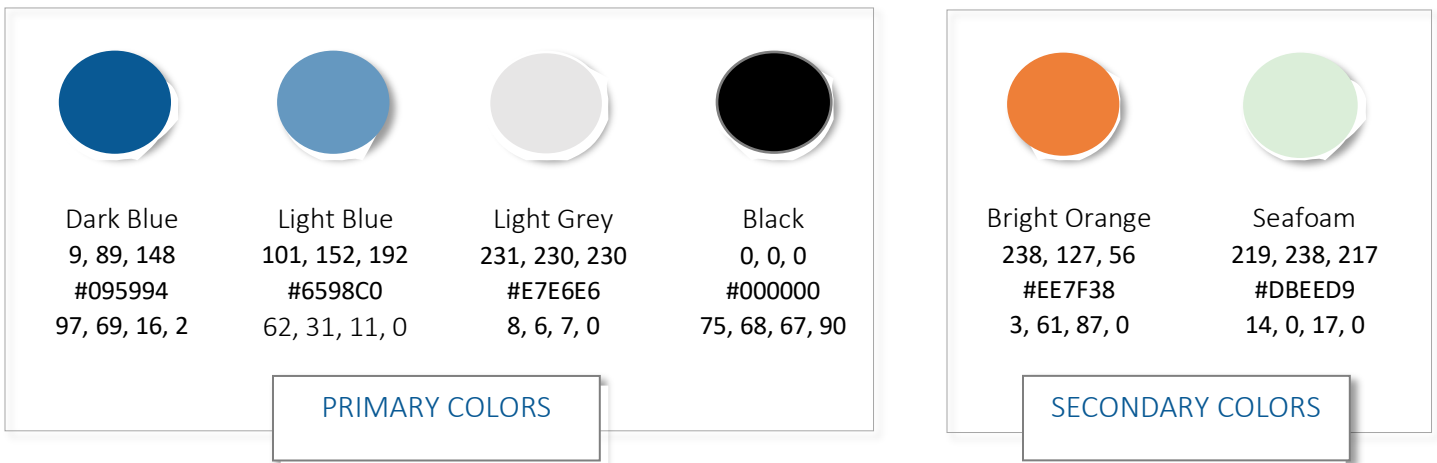
The color palette below represents the official ECIS palette. These colors should be used when generating the following content:

- Documents
- Web content

- Templates
- Logos
- Printed materials

ECIS follows the 60/30/10 rule when it comes to using color. Bright colors, such as orange, should be used sparingly, but effectively.

Primary colors are used most of the time throughout much of a document while secondary colors are used as accent colors.



## 2.3 Typography

ECIS communications, online content and documentation should follow the suggested typography and font families used in this section. The typography for general use is for everyday general communications and short documents. Typography for formal use is for longer documents (more than five pages) that require structure, such as SOPs or user guides.

### 2.3.1 Typography for general use

The heading and body fonts below are for general communications including email, short documents, diagrams, etc.

## Heading Font

Font Family: Calibri

Size: 14 pt.

Styles: Regular

**Bold**

*Italic*

***Bold Italic***

## Body Font

Font Family: Calibri Light

Size: 12 pt.

Styles: Regular

**Bold**

*Italic*

***Bold Italic***

### 2.3.2 Typography for formal use

The fonts and bullets below are for more formal documentation, including user guides, training manuals, Standard Operating Procedures (SOPs), and other end-user materials.

## Title

**Font:** Calibri  
**Font Size:** 28 pt.  
**Font Color:** Black

**Use:** Major headings

## Heading 1

**Font:** Calibri Lt.  
**Font Size:** 16 pt.  
**Font Color:** Blue

**Use:** Headings

## Heading 2

**Font:** Calibri Lt.  
**Font:** 14 pt.  
**Font Color:** Blue

**Use:** Level 2 headings

## Heading 3

**Font:** Calibri Lt.  
**Font:** 12 pt.  
**Font Color:** Lt. Blue

**Use:** Level 3 headings

## CAPTION

**Font:** Calibri Lt.  
**Font Size:** 9 pt.  
**Font Color:** Blue

**Use:** graphics, tables



**Font:** Calibri  
**Font Size:** 12 pt.  
**Font Color:** various

**Use:** lists

## Web

**Font:** Open Sans  
**Font Size:** 16 pt.  
**Font Color:** various

**Use:** web content

## 2.4 General Formatting Guidelines

### 2.4.1 Font and paragraph guidelines:

- General use fonts should be 12 pt.
- Titles and main headers should be at least 14 pt.
- There should be 1-2 lines in between paragraphs.
- There should be at least one blank line after a header and before a footer.
- Use titles and subtitles for long documents, user guides, standard operating procedures, etc.
- Use 1.15 spacing to enhance readability.

### 2.4.2 Charts, screenshots, and images guidelines:

- There should be at least two blank lines before and after images (images include charts, tables, screen shots, vectors, etc.).
- Images should contain captions directly below them.
- Images should be placed in the same position throughout the document. For example, if you decide to place images in line with the left margin of text, all images should appear in the same position throughout your document.
- Images should reflect surrounding content and should not be offensive or irrelevant.
- When using images, always introduce it in the paragraph above.
- If using an image from the web, make sure it is royalty free, it's under Creative Commons Zero (CC0) license, or you have permission to use it; give credit for the image if it isn't CC0.
- Use the ECIS color palette for tables, charts, and diagrams as illustrated in Figure 1.

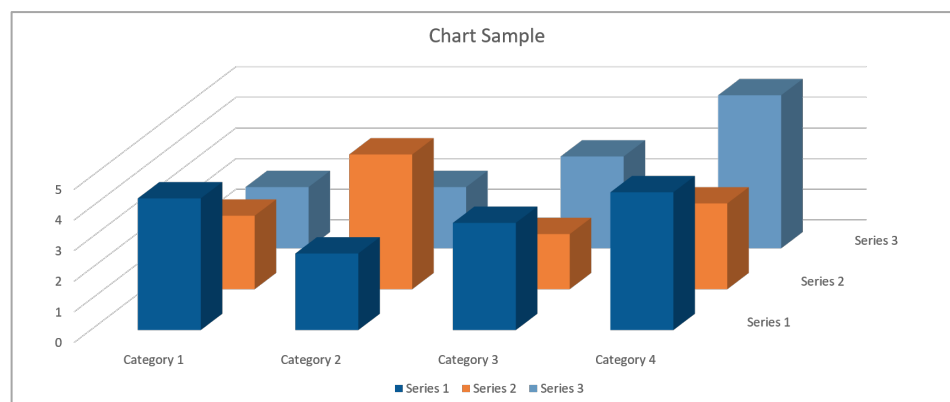


Figure 1. Sample Chart



# GRAMMAR AND MECHANICS

Writing styles vary for specific types of written communications and web content, however, technical documentation is typically straightforward and instructional.

Grammar and mechanics are still very important when writing technical content, particularly for the purposes of accessibility. While these guidelines aren't exhaustive, they are the most widely-accepted usage in most cases.

## 3.1 General writing guidelines

The following is a list of general writing guidelines for all ECIS documents, including:

- Avoid using jargon or industry terminology unless required
- Don't use a long word when a short word will do
- Use [active voice](#) whenever possible
- Paragraphs should not contain more than 3-4 sentences
- Use one space after a period at the end of a sentence
- Always use the Spell Check feature to check your spelling
- Always keep your audience in mind when writing everything
- Always proofread your documents

## 3.2 Capitalization

- For titles of documents, capitalize the first word and accompanying “principal” words (nouns, pronouns, verbs, adverbs, adjectives, supporting conjunctions).
- For all other titles, such as headers and subtitles, only capitalize the first letter of the first word and proper nouns.
- Always capitalize the following:
  - companies
  - brand names
  - weekdays and months
  - holidays
  - institutions and organizations
  - territories
  - streets and roads

- Capitalization when writing about government:
  - You would capitalize Congress and U.S. Constitution, but not congressional and constitutional.
  - Do not capitalize federal or state unless it is part of the title of the institution (i.e., Department of State, state of Maryland).

### 3.3 Punctuation

- Always use periods at the end of sentences.
- Use commas judiciously.
- Use semi-colons between independent clauses (two related sentences that could be sentences on their own). Why not just write two sentences? You don't want too many short sentences, so if you have two related sentences that can be separated by a semi-colon instead of a period, go with the semi-colon.
- Use colons to separate a sentence from a list. This would be used for in-sentence lists or bulleted or numbered lists.
- Punctuate bulleted and numbered lists with complete sentences or for uniformity.
- Do not use punctuation for fragmented sentences of a few words.
- Use the same punctuation rules for the entire list.
- s, 's, and s':
  - For plural words only use "s" with no apostrophe: bikes, computers, servers.
  - For possessive words use "'s": the girl's bike, the boy's bike, the agency's computer.
  - For plural possessives use "'s'": the girls' bikes, the agencies' computers.
- When to use i.e. and e.g.:
  - i.e. should be used when you are clarifying a statement (i.e., making something clearer).
  - e.g. should be used to introduce examples, for example: There are some good grocery stores around here (e.g., Wegman's, Harris Teeter, Whole Foods).

### 3.4 Numbers

- Spell out numbers under 10.
- Spell out numbers at the beginning of a sentence.
- Fractions, years, and dates should be written as numbers.
- Use "million" or "billion" instead of using the number (e.g., 2.6 billion, 1 million).

- Use commas to separate thousands (e.g., 2,000, 54,236, 200,000).
- Spell out ordinal numbers (e.g., first, second, third, etc.).

### 3.5 Bullets & Numbering

- Use numbering for ordered lists (i.e., a list of steps in a process).
- Use bullets for unordered lists (i.e., a grocery list).
- If you are listing more than three items, use a formal list.
- Use the same punctuation for the entire list.
- Capitalize the first letter of the first word in a formal or numbered list.
- Introduce your list; use a colon when appropriate.

### 3.6 Dates

Dates should be formatted in the following manner:

- 9/1/2017
- Friday, September 1, 2017
- Days of the week and months should be capitalized

### 3.7 Addresses

Addresses should be written in the following format:

Office of the Chief Technology Officer  
200 I Street, SE  
Washington, DC 20003

Attn: Director  
Office of the Chief Technology Officer  
200 I Street, SE  
Washington, DC 20003

### 3.8 Acronyms

The following are guidelines for using acronyms:

- If you use acronyms, spell them out for the first usage and put the acronym in parenthesis after; any subsequent usage can be just the acronym.
- Acronyms do not have periods between the letters. For example, FDA not F.D.A. and IBM not I.B.M.

# VOICE AND TONE

## 4.1 Voice

Voice is a reflection of your personality in your writing. In technical writing, your voice will generally be professional and straightforward.

An important element of voice is active vs. passive. Always use active voice when possible to keep the reader interested and to convey action. Examples of active vs. passive voice include:

- **Active voice:** You perform the upgrade
- **Passive voice:** The upgrade should be performed

Active voice clearly shows who is performing the action and what action they are performing.

## 4.2 Tone

Tone in writing is the same concept as your tone in speaking. Always consider your audience and how your writing tone in all communications. Some suggestions for use include:

- Stress the reader benefit
- Write at an appropriate level of difficulty
- Be sincere
- Be knowledgeable and confident about the subject matter

The tone for technical writing is general knowledgeable and appropriate to the audience's level of expertise in the subject matter.

## 4.3 Industry and Technical Jargon

Use of industry and technical jargon should be kept to a minimum in our communications products to ensure everyone who reads our documentation always understands what we are trying to convey. When writing any kind of communication, remember to:

- Use plain English
- Avoid complex technical language
- Avoid ambiguity
- Promote clarity

# ACCESSIBILITY

## 5.1 What is Section 508?

Section 508 is an amendment to the Rehabilitation Act of 1973 that requires federal agencies to ensure all information technology products that agencies produce and employ are accessible by people with disabilities. This law applies when federal agencies procure, develop, use, or maintain electronics and information technology. This means that under the Section 508 rule, federal government agencies must provide disabled employees and members of the public access to their information that is as usable as what is available to non-disabled persons. This Style Guide includes updated Section 508 changes that are in effect as of January 18, 2018.

## 5.2 Latest changes to Section 508

The following list reflects changes to existing guidelines (January 18, 2018) as they relate to documentation and digital content as per [GSA's Accessibility](#) website:

- Documentation for hardware and software products must include how to use accessibility and compatibility features integrated into these tools.
- Electronic documents must adhere to the same requirements as electronic content.
- Documentation must be made available in a non-electronic format upon request.
- Support services such as help desks, training services, call centers, and automated technical support must include information on access and compatibility features for customers with disabilities.

## 5.3 Formatting documentation to adhere to Section 508 standards

Most documents generally adhere to Section 508 standards, however, it's good to know specific steps you should take to ensure your documents are compliant.

The standards below come from the [Accessible Electronic Document \(AED\) Community of Practice \(COP\)](#).

- Filenames:
  - The filetype is .docx for a Word document
  - The filetype is .xlsx for an Excel document
  - The filename identifies the document's purpose

- Headings:
  - Use styles to create headings
  - The navigation pane matches the visual outline of the document
- Lists:
  - Use built-in list tools for lists, including bullets and numbering
- Tables:
  - The tab order of tables should match the visual layout
  - Text wrapping is set to “none” in table properties
  - Tables should be simple; no merged or split cells
  - Use only one row of headers
  - The first row is set to “Repeat as header row.”
- Language:
  - Identify distinct languages within the document
- Names for links:
  - Link names should be unambiguous. For example, you should not use “click here” for a hotlink; use descriptive text for all hyperlinks.
  - Links should be uniquely identified.
- Headers, footers and watermarks:
  - Any vital information in headers, footers, and watermarks should be duplicated within the document text
- Images and Objects:
  - There should be descriptive text in the alternate text area, caption, or surrounding text with a good description of the image or object.
  - Any descriptive text within the image itself should be verbatim when described outside of the image.
  - “Double-quote, space, double-quote” is entered for decorative objects.
  - Objects (including text boxes) should be in line with text.
  - There should be no flashing objects or graphics.
- Color:
  - The meaning of color is duplicated within the text (for example, persons who are color blind cannot see colors in a stoplight chart).
  - Use the proper color contrast (light text on a dark background or dark text on a light background).
  - Think about representing text or data with symbols instead of shapes.
- Multimedia:
  - Audio-only content has an accurate and complete transcript.
  - Video-only content has an accurate and complete description.
  - Multimedia has accurate and complete synchronized captions.
  - Multimedia has accurate and complete synchronized audio descriptions.

- Forms:
  - Fillable form fields should be excluded from the document.

#### 5.4 Alternative accessible versions of documents

If you have a document that requires specific formatting such as tables with merged cells or animated objects, you should create an alternative accessible version of your document and be sure to keep it up to date whenever you are updating your original version.

# ECIS PUBLICATIONS

## 6.1 Guidelines for technical documents

This section includes guidelines for creating technical documentation. The goal for all documentation and communications coming out of OCTO and ECIS is to document our networks, systems and processes to convey understanding and have an accurate record of our activities.

### 6.1.1 Diagrams

Diagrams are useful to map networks, work flows, server farms, and just about every aspect of the IT infrastructure. ECIS adheres to the following guidelines when creating diagrams:

- Use Visio or PowerPoint to create diagrams; save them as .vsdx, .pptx and .pdf files
- Use the ECIS color scheme when creating diagrams for ECIS.
- Use the ECIS diagrams template when creating diagrams (to be created).
- Explanations of the diagram’s contents should be explained in an accompanying document or on the diagram itself.
- The author’s name and the date should be included on the diagram.

### 6.1.2 User manuals and guides

User manuals and guides are created for end users who utilize software programs either developed or purchased by OCTO. These guides typically help users when learning a new system and serve as a reference guide for specific tasks.

- Use Word to create user guides; save them as .docx and .pdf files.
- Use the ECIS documentation template (to be created).
- The audience for user manuals should generally be directed to novice users unless a more experienced audience is appropriate.
- A quick reference guide should be included with the user manual when appropriate.

### 6.1.3 Technical specifications documents

Technical specifications documents detail specific technical attributes of a network, hardware configuration or a software application. Hardware and network specifications typically include diagrams as part of the larger infrastructure and software specifications typically include workflows.



- Use Word and Visio to create technical specifications documents; save them as .docx, .vsdx and .pdf files.
- Use the ECIS documentation template (to be created).
- The audience for technical specifications documents are engineers, managers, PMs, and purchasers.

#### 6.1.4 Runbooks

Runbooks are used to document operations and responsibilities within the engineering, networking, and administrator (both hardware and software) areas of an IT department.

- Use Word and Visio to create runbooks; save them as .docx, .vsdx and .pdf files.
- Use the ECIS documentation template (to be created).
- The audience for runbooks are engineers, DBAs, and architects.
- Runbooks should include:
  - Common operations
  - System build information
  - Administrative procedures
  - Startup/shutdown procedures
  - Maintenance procedures
  - Recovery procedures
  - Troubleshooting procedures (common scenarios only)

#### 6.1.5 APIs

Application Program Interfaces (APIs) are a set of commands, functions, and protocols used by programmers to allow applications to work together without having to exchange code. For example, when you look up a local restaurant on Yelp.com and the Google Map appears with a marker for the restaurant, that's an API at work allowing Yelp to access the Google Map.

- APIs should always be documented online and be accessible to developers who need to use and share them.
- Use the ECIS documentation template (to be created).
- The audience for APIs are developers.

#### 6.1.6 Standard Operating Procedures

Standard Operating Procedures (SOPs) are procedural documents outlining standards for software applications, hardware management, best practices, and any other repeatable process that occurs in OCTO/ECIS.

- Use Word to create SOPs; save them as .docx and .pdf files.
- Use the ECIS documentation template (to be created).

- The audience for SOPs varies, however, they should be written in plain language.

### 6.1.7 Training Materials

Training materials are typically detailed user guides or videos used for training for specific software and hardware.

- Training materials can be created using the following applications:
  - Word to create training manuals
  - PowerPoint to create training presentations
  - Adobe Captivate to create training videos
  - Microsoft Visio to create diagrams for reference
- Use the ECIS training materials templates (to be created).
- The audience for training materials varies depending on the software application or hardware device, however, they should be written in plain language.

## 6.2 Document Contents

Most general documentation will contain regular text and possibly a header for anything longer than one page. Generally, guidelines for this type of content requires only page numbers and sub headings if appropriate.

Longer and more formal documents, such as user guides, SOPs, training materials, etc. need to have additional structure as they will be longer and need to be organized.

### 6.2.1 Title Page

Formal documents should have a title page. The title page should include the name of the document and the month and year the document was created. Use of appropriate graphics that create interest are encouraged.

### 6.2.2 Table of Contents

Formal documents should have a table of contents. Use Automatic Table 1 in Word to automatically format your table of contents.

### 6.2.3 Document History

All technical documents should have a separate page at the beginning of the document that summarizes any changes made. The Document History page should be in table format as illustrated in Table 1 and include:

- Revision number
- Revision date
- Summary of changes
- Author
- Approval name
- Approval date

Revision Number	Revision Date	Summary of Changes	Author	Approval Name	Approval Date
0.1	9/7/2017	Made minor updates to steps in overall document	ECIS VM Team		

Table 1. Document History

#### 6.2.4 Glossary

A glossary should be included in any training materials or documentation that uses technical language to ensure the reader has a quick reference to look-up unfamiliar terms and words.

When creating a glossary for a document, it should be located in the Appendix.

#### 6.2.5 Index

An index should be included in any long documents or documents that require fast retrieval of information.

The index should be located at the end of a document.

### 6.3 Headers and footers

Headers and footers should be used on formal documents such as training manuals, user guides, etc.

Headers can contain a section title, logo, or the name of the document.

Footers contain a logo, page numbering, version number, and/or document number. Page numbers should be located in the lower left-hand corner of the footer.

### 6.4 Page numbering

Anything over two pages should contain page numbers at the bottom of the page within the footer section. The following are suggestions for how to format and use page numbering:

- Cover pages should not contain page numbering.
- Tables of contents and front matter should have separate numbering from the rest of the document and should be formatted as small roman numerals (i, ii, iii).
- The body of a document should contain regular numbering and start with page 1 at the first page of the first section or chapter.

### 6.5 Section numbering

Formal documents should have sections numbered using headings in Word. Heading styles can be found in [Section 2.3.2, Typography for formal use](#). The following numbering schema should be used for headings and sub-headings:

- Headings 1
- Level 2 sub-heading 1.1
- Level 3 sub-heading 1.1.1