



# Style Guidelines

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# Introduction

Style guidelines provide general guidance, editorial standards, and best practices that support Syntellis Performance Solutions quality initiatives. They also provide a comprehensive list of preferred word conventions and usage that supports consistency across our deliverables and products.

Guidelines constantly evolve and change. As you become familiar with this document, please add your comments and suggestions directly in this PDF, or contact Katy Campion.

For easy access, guideline topics appear in “[Syntellis Purple](#).”

## Writing references

This collection of guidelines are based on well-established, industry-standard guidance, and writing and localization best practices from the following references:

- [Chicago Manual of Style](#) (for general usage)
- [AP Stylebook Online](#) (for general usage)
- [Microsoft Style Guide](#) (for UI- and web-specific usage questions that are not covered by the AP Stylebook or the Chicago Manual of Style)
- Syntellis Style Guide (for Syntellis marketing communications)

Our preferred dictionary the [American Heritage Dictionary of the English Language](#).

## Guideline suggestions and updates

The Customer Knowledge Style Guidelines document is a collaborative document. As members of this team, we are all responsible for ensuring the accuracy of the information, providing feedback, researching best practices, and requesting updates.

To suggest changes to existing style guidelines or propose new guidelines, post suggestions in the Microsoft Team Style Guidelines channel for team members to weigh in or share expertise.

## Using this style guide

The following sections and topics are presented in alphabetical order:

- **General writing style** – General guidance for how we write documentation, including capitalization, voice and tense, lists, dates and times, measurements, and jargon.
- **Grammar** – Components of grammar, such as nouns, verbs, plurals, and so on.
- **Punctuation** – Rules and usage, including periods, commas, quotations, hyphenation, and so on.
- **Screen captures and graphics** – General guidance and specifications.
- **User-centered writing strategies** – Recommendations for making our technical documentation deliverables more usable, useful, and easy to understand.

- **User interface** — Descriptions and best practices for documenting user interface (UI) controls.
- **Preferred terminology and phrases** — Recommended words and phrases that support consistency across products, support localization best practices, and reduce ambiguity for non-native English readers.



## General writing style

General writing style ensures consistency across our products and deliverables and establishes a casual yet professional tone. Although we can draw upon several different sources for style guidance, our agreed-upon writing style helps reduce errors and inconsistencies that cause confusion for our readers.

### Abbreviations and acronyms

An abbreviation is a shortened form of a word or name that we use in place of the full word or name. Unless an abbreviation or acronym is extremely well-known and understood in mainstream documentation, define all acronyms and abbreviations.

Follow the rule of first citation when using acronyms. Provide the description and place the acronym in parentheses (for example, *Health Insurance Portability and Accountability Act (HIPAA)*) at the first occurrence in each online help topic.

#### Acronyms on user interface

When referring to a user interface (UI) label with an abbreviation or acronym, present the acronym first and the description in parentheses. For example, if your application contains a field called *NPI*, write *Enter the National Provider Identifier (NPI) number*.

#### Acronyms in titles

You can use an acronym in a title; however, you must spell out the acronym in the body of the topic.

#### Common acronyms

Capitalize the expanded acronym as you would typically write it. Do not capitalize the first letter of each word in the acronym if the word is not a proper noun or not typically capitalized in the context of the sentence.

If the acronym is extremely common, you do not need to expand it.

#### Pluralized acronyms

To make acronyms plural, use an s without the apostrophe (for example, *IDs*). Do not pluralize acronyms that are already plural. For example, *FAQ* stands for *frequently asked questions*, so do not write *FAQs*.

### Academic degrees

The following degrees require periods in their designations:

- B.A.
- B.S.
- M.B.A.
- M.D.

- Ph. D.
- Dr. P.H.

Do not use periods for professional certifications:

- LPN
- RN
- CPA
- CFA
- FHMA

Additional guidelines:

- Do not mention bachelor degrees in company biographies.
- Spell out unusual degrees.
- Italicize *cum laude*, *magna cum laude*, and *summa cum laude*.

## Active versus passive voice

In most cases, we use active voice for technical documentation. Active voice is clear, concise, and identifies the actor and is easier to read and understand.

You might find it necessary to use passive voice when you don't know who or what is performing the action. By placing the subject of a sentence directly in front of descriptive phrases, readers can easily understand to whom or what the phrase refers.

Active voice	Passive voice
The supervisor sends a staffing report to all interested parties every Monday.	A staffing report is sent to all interested parties every Monday morning.
Review the changes to the following sections.	Changes were made to the following sections.
Users encountered errors when they updated the software.	Errors were encountered when users updated the software.

## Anthropomorphism

Anthropomorphism is the attribution of human traits, emotions, or intentions to non-human entities.

Avoid giving human characteristics or emotions to hardware or software. Although applications and commands perform actions, avoid using words that convey the following:

- Emotions (refuses or wants)
- Behavior (forces or tries)

- Intellect (knows or realizes)
- Conversation (says or asks)

Refer to straightforward actions whenever possible.

Preferred usage	Anthropomorphism
The application verifies that you are an authorized user.	The application <i>checks to see</i> whether you are an authorized user.
A wizard provides guidance for printing a report.	The wizard <i>helps you</i> print a report.
An email provides instructions for creating a username and password.	The email <i>tells you</i> how to create a username and password.

## Capitalization

Use standard capitalization rules. Common nouns are typically lowercase, while proper nouns are typically capitalized.

- Never use all uppercase letters for emphasis.
- Follow the capitalization rules or conventions of the software.
- Follow the capitalization on the UI.
- Do not capitalize interface elements that are used generically, such as *page, window, tab, field, and menu*.
- Do not capitalize feature names or functionality unless they are capitalized in the interface.
- Capitalize the first word in bulleted list items.
- Capitalize the second word in compound words if it is a noun or proper adjective or if the words have equal weight (for example, *Cross-Reference* or *Read/Write access*).

### Capitalization of titles and headings

Title case is also referred to as initial caps and refers to capitalizing the principal words in titles and headings, but not articles, conjunctions, or prepositions. Sentence case refers to capitalizing only the first word in a title or heading.

- Use title case only for product names and titles on PDF guides. Capitalize prepositions that are part of a verb phrase.
- Use sentence case for all headings. For UI controls and user entry, use the same capitalization that appears on the UI.



**NOTE:** *The Customer Knowledge Team will go forward with sentence case for headlines, topic and course titles, and headings for all new or updated content. At this time, we will not make global changes for consistency within existing projects.*

## Department names

Capitalize the names of our departments when referring to them specifically, such as *Marketing* or *Sales*. Do not abbreviate department names, except for department names that are expressed in text as initials, such as *IT*.

## Corporate titles

Capitalize the titles of all executives, regardless of whether they precede or follow the person's name:

- Syntellis *CEO* Flint Brenton announced first-quarter earnings results.
- Kris Kildahl, *Syntellis Chief People Officer*, congratulated employees for their dedication during the year.

You do not need to spell out commonly understood roles, such as CEO, CFO, and CIO. These designations do not require periods; however, they must be capitalized.

## Contractions

Contractions—in which an apostrophe is used to "contract" two words into one by joining parts of each word—are considered to be informal and conversational (for example, *don't* versus *do not*). Contractions can create a friendly tone; however, most published style references advise against using contractions in technical documentation, including:

- Chicago Manual of Style
- The Associated Press Stylebook
- Microsoft Style Guide
- Elements of International English Style

In keeping with the goal of writing user-centered content, carefully consider the audience when using contractions. At Syntellis, use contractions in Marketing material to communicate a friendly tone and connection with the customers. In technical documentation and course content, be judicious when using contractions and consider English as a foreign language (EFL) readers when deciding which contractions to use. In most cases, the best practice is to avoid the use of contractions in technical documentation.

## Dates, days, and times

The passage of time is expressed using specific dates and numerical representations of hours and minutes.

### Dates

- Use this format for dates: Month, Day, Year (for example, *December 30, 2004*).
- Spell out the name of the month in dates (for example, *January 14, 2021*).
- Follow the UI when expressing dates.

- Use preformatted formats for dates that appear in templates and forms (for example, *MM/DD/YYYY* or *MMDDYY*).
- Use numbers and slashes for dates on the UI, if supported by code.
- Use *occurs* rather than *falls* when referring to date ranges (for example, The upgrade *occurs* between January 14 and January 21).

### Days of the week

- Capitalize the days of the week. Don't use abbreviations unless space is extremely limited. Don't include a period with the abbreviations.
- When required, use three-letter abbreviations (for example, *Sun, Mon, Tue*, and so on).
- In calendars and date picker UI controls, you can use one- or two-letter abbreviations.
- For the three-letter and two-letter abbreviations, use sentence-style capitalization (*Su*), and not uppercase (*SU*).

### Month

- Capitalize the names of months and their abbreviations.
- Don't use abbreviations unless space is extremely limited.
- Use three-letter abbreviations when necessary.
- Don't include a period with the abbreviations.

### Seasons

When referring to season, write in lowercase unless the season is at the beginning of the sentence or part of a formal name (for example, *fall 2022, Winter Olympics, spring*).

### Time

- Use the capital letters AM and PM, preceded by a space (for example, *10:45 AM*).
- Use numerals with units of time (days, hours, weeks).
- For time ranges, use the word *to* (for example, *10:00 AM to 2:00 PM*).
- Use *noon* and *midnight* rather than *12:00 noon* and *12:00 midnight*.
- Do not use the term *24/7*.

### Time zones

- Capitalize the full name of the time in force within a particular zone, such as Eastern Time, Mountain Time, Central Time, and Pacific Time.
- When using time zone abbreviations, use capital letters with no periods (for example, *ET, CT, MT, and PT*).
- Do not refer to Daylight or Standard time, as these references become obsolete, depending on the season. When referring to *6:00 PM MT*, the time is 6:00, regardless of the time of year.

Correct	Incorrect
The change <i>occurs</i> after January 1, 2021, at 12:00 AM Eastern Time.	The change occurs after <i>1/1/2021 at 12 midnight eastern time</i> .
The patient's birth date is <i>January 14, 1967</i> .	The patient's birth date is <i>1/14/67</i> .
Verify that the file conversion date <i>occurs</i> before the system update.	Verify that the file conversion date <i>falls</i> before the system update.
Customer Service is available from <i>8:00 AM to 4:00 PM ET</i> .	Customer Service is available from <i>8:00 a.m.– 4:00 p.m. EST</i> .

## e-words

Certain compound words that are prefaced with e or e- refer to an electronic format.

- Use a lowercase e and hyphenate for clarity and necessary.
- Do not hyphenate *email*.
- Avoid forming new words with e- (for *electronic-something*).

Other commonly used e-words are usually (but not always) hyphenated, including:

- e-commerce
- e-money
- e-visit
- e-learn

## False subjects

Sentences that begin with or contain the phrases *there is*, *there are*, and *it is* contain false subjects. In false subject constructions, the word *it* or *there* acts as a filler for the real subject of the sentence, and the verbs are passive. The subject and verb have no real meaning.

Whenever possible, rewrite the sentence to identify the subject and engage readers.

Correct	Incorrect
Resetting your password is easy.	It is easy to reset your password.
Complete the required steps for registration.	There are required steps to complete registration.
Mastering the procedure takes time and effort.	It takes time and effort to master the procedure.
Add providers to a facility using one of the following methods.	There are several methods to add providers to a facility.

## File names and extensions

File names and extensions use specific references within the documentation.

### Case

- Write *file name* as two words.
- Match the case in the file name and its extension.
- When starting the extension on its own in a sentence, preface the extension with a period and use lowercase (for example, the *.docx* file).
- Use uppercase and no period in acronyms when referring to file types (for example, *PDF* or *XML*).

### Articles

Use the correct article based on the pronunciation of the extension (*a* or *an*) (for example, *a .com* file or *an .exe* file).

### Terminology and usage

Avoid using file name extensions in customer-facing documentation. Describe the type of program file, such as an application, a worksheet, or a presentation. If you must include the extension, spell out the file type with the acronym in parentheses.

Usage	Examples
File name extension	Word adds <i>.docx</i> to the file name if you do not specify the format.
Articles	<i>A .pdf</i> file <i>An .exe</i> file <i>An .html</i> file  <i>We do not</i> pronounce the dot when considering which article to use (for example, " <i>a dot h-t-m-l file</i> ").
Acronyms	Scalable vector graphics ( <i>SVGs</i> ) are more efficient for line art than portable network graphics ( <i>PNGs</i> ).  Refer to the attached <i>PDF</i> for more information.

## Gender-neutral language

The singular *they* is a generic third-person singular pronoun in English. The use of the singular *they* is accepted because it is inclusive of all people and helps writers avoid making assumptions about gender.

Although usage of the singular *they* was previously discouraged, many advocacy groups and publishers have accepted and endorsed it, including both the *American Heritage* and *Merriam-Webster's* dictionaries.

When referring to the gender of a single unknown user, admin, or another person, use the singular *they*. Alternatively, you can omit pronouns by using plurals, which eliminates subject/verb disagreement and often results in less wordy sentences.

Correct	Incorrect
The administrator receives <i>their</i> login credentials from IT. <i>Administrators</i> receive their login credentials from IT.	The administrator receives his/her login credentials from IT
Every minor is registered by <i>their</i> parent. <i>Minors</i> are registered by their parents	Every minor is registered by his or her parent.
Every client received a welcome package that was delivered to <i>their</i> office. <i>Clients</i> received Welcome packages that were delivered to their offices.	Every client received a welcome package that was delivered to <i>his</i> office.

## Jargon and technical terms

Jargon refers to technical language and abbreviations and acronyms that are used by specific audiences. Jargon is not appropriate for all audiences. Technical jargon is sometimes acceptable for programmers and other technical audiences when you can assume a specific background or level of expertise.

Always write with your audience in mind but be mindful to avoid unnecessary technical jargon that might be difficult to translate. For general audiences, use technical language only when necessary and always introduce and explain technical terms at the first usage.

Avoid jargon when:

- You can use a more familiar term.
- The term is familiar to only a subset of your audience.
- The term obscures rather than clarifies the meaning of the text.

Additional guidelines for using jargon:

- When in doubt, verify with your subject matter experts (SMEs).
- Identify alternative terms when reviewers question a term.
- Consider that a term acceptable if it is used in mainstream documentation.

Familiar term	Jargon
<i>Use available resources</i>	<i>Leverage available resources</i>
<i>Use existing materials</i>	<i>Utilize accessible materials</i>



Familiar term	Jargon
Additional devices Additional hardware	Peripheral hardware

## Latin abbreviations and phrases

Avoid using Latin abbreviations in technical documentation, as they are often misinterpreted or misused. Whenever possible, use the preferred English phrase.

Latin abbreviation	Preferred English phrase
ad hoc	immediate, on-demand, unscheduled
e.g.	for example
etc.	and so on
i.e.	that is
via	by, by way of, by means of, through
vis-à-vis	in relation to, with regard to, as compared with

You can also rephrase sentences to avoid using Latin abbreviations.

Latin abbreviation	Rephrased to eliminate Latin abbreviations
You can download updates on ad hoc basis.	You can download updates on demand.
The page provides options for customizing your order (e.g., size, color, style, etc.).	The page provides options for customizing your order ( <i>for example</i> , size, color, style, and so on). The page provides options for customizing your order, <i>such as</i> size, color, and style. The page provides options for customizing your order, <i>including</i> size, color, and style.
After completing the course ( <i>i.e.</i> , <i>Axiom Essentials</i> ), you should be able to navigate the Axiom clients and understand users, roles, and security types. I am an individual contributor, <i>i.e.</i> , I do not attend meetings with the Executive Leadership Team.	After completing <i>Axiom Essentials</i> course, you should be able to navigate the Axiom clients and understand users, roles, and security types. As an individual contributor, I do not attend meetings with the Executive Leadership Team.

Latin abbreviation	Rephrased to eliminate Latin abbreviations
You can download the course <i>via</i> Syntellis Academy.	You can download the course <i>from</i> Syntellis Academy.
I booked my flight to Los Angeles <i>via</i> Chicago.	I booked my flight to Los Angeles by way of Chicago.
If the company's products become too expensive <i>vis a vis</i> their competitors' offerings, their products won't sell.	If a company's products become too expensive as <i>compared with</i> their competitors' offerings, their products won't sell.

## Lists (bulleted and numbered)

- Use bulleted (unordered) lists when a specific order is not required or implied (such as a list of equal characteristics or conditions).
- Use numbered (ordered) lists when a specific order or priority is imperative, such as in numbered steps.
- Capitalize the first word in bulleted list items.
- When possible, use a bulleted list instead of a serial list when the list contains three or more elements. Bulleted lists are easier to read and scan and can aid user comprehension.

Use the following best practices when constructing bulleted lists:

- Active voice
- Present tense
- Concise language
- Short sentences
- Positive constructions

### Bulleted lists

Use bullets for unordered information that does not require a specific sequence.

- Bullet
- Bullet
  - Bullet 2
  - Bullet 2

Do not use single or orphaned bullets (bulleted lists with only one item). Rewrite or reformat your list for better readability.

### Numbered lists

Use numbered lists for sequential steps (user instructions) or prioritized items.

## Punctuation in lists

In technical documentation, we use two types of bulleted lists—those in which the bullet points complete a grammatical sentence and those in which they do not.

You can introduce a bulleted list or numbered list with either a clause or a complete sentence. Use a colon at the end of a sentence or a clause that immediately precedes the list.

- If the bulleted item is a complete sentence, use punctuation.
- If a bulleted item is a clause (and not a complete sentence), do not use punctuation.
- If the bulleted list is a mix of complete and incomplete sentences, use punctuation.

All complete sentences	All parallel clauses
<p>The following new features are available in Data Analytics:</p> <ul style="list-style-type: none"><li>• Users can schedule virtual visits for OB/GYN specialties.</li><li>• Users can use their phones to take and upload photos and claims.</li><li>• Providers now display average costs by the user's geographical area.</li></ul>	<p>The following new features are available in Data Analytics:</p> <ul style="list-style-type: none"><li>• Virtual visits for OB/GYN specialties</li><li>• Phone usage to take and upload photos and claims</li><li>• Average costs by the user's geographical area</li></ul>
<p>To earn the Shopping for Care Reward, users must complete the following steps:</p> <ol style="list-style-type: none"><li>1. Create a cost estimate for an eligible procedure.</li><li>2. Activate the reward.</li><li>3. Complete the eligible procedure using the provider in the cost estimate.</li><li>4. File a claim for the procedure.</li></ol>	<p>Most patients consider these factors as the most important when selecting a provider:</p> <ol style="list-style-type: none"><li>1. Cost</li><li>2. Rating</li><li>3. Location</li><li>4. Gender</li></ol>

Whenever possible, write lists in parallel structure, in which every list item contains either all complete sentences or all phrases. If each list item is a full sentence, end each item with a period. If each list item is a phrase, do not use periods.

In rare instances when it's not possible to restructure a list to use either all sentences or all clauses, punctuate all bulleted items.

Do not use semicolons at the end of bulleted elements or the word and when constructing a bulleted list.

## Measurements

Measurements include distance, temperature, volume, inches, fluids, height, weight, and units of time. Computer measurements, such as bits, bytes, megabytes, and gigabytes, are also considered units of measure.

- Use numerals for all measurements, even if the number is less than 10. This guideline is true regardless of whether the measurement unit is spelled out or abbreviated.
  - 5 inches
  - 24 hours
  - 1 day
  - 1 gigabyte
  - 7 fluid ounces
  - 100 pounds
- When referring to two or more quantities, repeat the unit of measure (for example, Define the time as *12 hours* or *24 hours*).
- Use numbers and a lowercase “x” when referring to screen resolutions (for example, 1024 x 768).
- Always keep values and units of measure together on the same line.
- When a measurement is used as an adjective, use a hyphen to connect the number to the measurement. Otherwise, do not use a hyphen:
  - *12-point* type
  - *8.5-by-11-inch* paper
  - *A 40-hour* work week

## Numbers and percentages

The general rule is to spell out numbers one through nine and use numerals for the number 10 and higher.

### Numbers:

- Spell out zero through nine if the number does not precede a unit of measure or is not used in input.
- Use numerals for 10 and above.
- Use figures when expressing millions or billions; however, in presentation material where space is limited, abbreviate millions or billions as *M* or *B*, respectively (for example, *\$345M* or *994B*).
- For round numbers of 1 million or more, use a numeral plus the word, even if the prefix number is less than 10.

- Use numerals for all measurements, even if the number is less than 10. This rule applies whether the measurement is spelled out, abbreviated, or replaced by a symbol.
- Use numerals in dimensions, such as screen resolutions.
- Maintain consistency among categories of information. If one number in a category requires a numeral, use numerals for all numbers in that category.
- Use a hyphen when indicating a negative number (for example, -79).
- Avoid starting a sentence with a numeral. If necessary, add a modifier before a number. If you cannot avoid starting a sentence with a number, spell out the number.
- Hyphenate compound numbers when they are spelled out.
- Use commas in numbers with four or more digits; however, follow the UI.
- When designating years, use commas only when a number has five or more digits.
- When using numbers in comparative statements, use numerals.
- Use *from* and *through* to describe inclusive ranges of numbers.

### Percent and percentages

- Use the percent symbol after numerals rather than spelling out the word percent (for example, order intake is at 83% of the goal).
- Spell out the word percent when describing a series or group (for example, ADCs are in use at 85 percent of acute-care facilities).

### Cardinal and ordinal numbers

A cardinal number indicates how many of something there is, while an ordinal number indicates the position of something in a list.

- Spell out ordinal numbers in text.
- Do not use ordinal numbers for dates or to indicate fiscal quarters.
- Do not use ordinal numbers in technical documentation; use ordinal numbers only in casual documentation.
- Do not add *-ly* as in *firstly* or *secondly*.

Cardinal numbers	Ordinal numbers
one, two, three...	first, second, third...
61, 32, 5	sixty-first, thirty-second, fifth
161	One-hundred sixty-first

## Phone numbers

Include the complete information necessary to call the number from anywhere in the world, including the country code and the city code. Separate phone numbers with periods (US) or spaces for readability.

Examples:

+1 02.345.6789

12 34 567 890

## Parallelism

Parallelism, which is also known as *parallel structure* or *parallel construction*, is a balance within one or more sentences of similar phrases or clauses with the same grammatical structure. Parallelism provides both clarity and rhythm in writing, improves readability, and helps users process, comprehend, and recall information.

To write in parallel structure, balance parts of a sentence with their correlating parts (for example, nouns with nouns and prepositional phrases with prepositional phrases). Occasionally, you might need to repeat any of the following:

- A preposition
- An article, such as a, an, or the
- The *to* in an infinitive
- The introductory word in a clause or phrase

In procedures and numbered steps, begin sentences with imperative verbs whenever possible.

In lists, maintain parallelism by using all complete sentences or all incomplete clauses or short phrases, but not a mix of both.

## Special characters

For special characters, use the word for the symbol, followed by the symbol in parentheses.

- Use an asterisk (\*) for wildcard searches.
- To identify digital content on a specific topic, your Twitter hashtag must contain the hashtag symbol (#) followed by a word or phrase.

## States and cities

Spell out states and municipalities. In casual references, the following American cities don't require a state abbreviation (although this guideline is used mostly in marketing materials):

- Atlanta
- Baltimore
- Boston
- Chicago
- Cleveland
- Dallas
- Denver
- Detroit
- Honolulu
- Houston
- Indianapolis
- Las Vegas
- Los Angeles
- Miami
- Milwaukee
- Minneapolis
- New Orleans
- New York
- New Orleans
- New York
- Oklahoma City
- Philadelphia
- Phoenix
- Pittsburgh
- St. Louis
- Salt Lake City
- San Antonio
- San Diego
- San Francisco
- Seattle
- Washington

## You versus the user

A common error in writing is to use *you* and *the user* interchangeably; however, using the correct term ensures that your content is consistent.

### Person performing the action

Whenever the content speaks directly to the person performing the action, write in the second person imperative (*you*). In steps, begin with the imperative verb form when possible (for example, "*Run the report*").

### Person taking action for other users.

When the content speaks to someone who acts on the behalf of others (for example, a system administrator who configures security permissions), refer to *users*. Whenever possible, refer to the plural form *users* to avoid awkward constructions or subject-verb disagreements.

### Mixed audience

If your content is intended for a mixed audience (for example, an overview topic that provides a summary of a new feature and its required configuration), use the applicable term when referring to specific types of users.

you	the user
After installing a common database, you must also update the client database to grant users access.	After installing a common database, system administrators must also update the client database to grant users access.
You have now enabled XYZ access for providers.	Providers are now granted XYZ access.
Select users for whom to grant access to XYZ.	Users must be granted permissions to access XYZ.

## Grammar

Grammar refers to the rules that govern spoken and written language. Grammar is the code that makes language work. It is through proper grammar that we can communicate effectively and translate information accurately.

### Adverbs

Adverbs are words or phrases that modify or qualify adjectives, verbs, or other adverbs and express a relation of place, time, or circumstance. Adverbs of manner, place, and time usually occur at the end of the clause (for example, "He played *brilliantly*").

If the verb has an object, the adverb comes after the object (for example, "We [the subject] *made* [the verb] a *decision* [the object] *quickly* [the adverb], and then *left*").

Do not hyphenate adverbs that end in *-ly* and the verb or adjective it modifies.

### Dangling gerunds

A dangling gerund is a word or phrase that modifies the wrong subject in a sentence. This mismatch occurs because the implied subject is missing.

A gerund is a word that ends in *-ing*.

Correct	Incorrect
By using documented protocols, <i>researchers</i> can easily control the process.	By <i>using</i> documented protocols, the process can be easily controlled.

### Dangling participles

A participle is a verb that acts as an adjective in the sentence. Participles can be present participles (ending in *-ing*) or past participles (ending in *-ed* or *-en*). A participle that does not modify a noun or pronoun in a sentence is considered a *dangling participle*.

To correct a dangling participle, add a subject near the phrase or change the phrase to a clause with a subject.

Correct	Incorrect
Even though <i>the developer</i> added more data, the report was still incomplete.	Even after adding more data, the report was still incomplete.



## Nouns

Nouns are words that identify people, places, or things.

### Nominalizations

The process of turning verbs and adjectives into nouns is known as nominalization.

Do not turn verbs into nouns, create verbs from nouns, or create noun strings. In addition, avoid using the same word as both a verb and a noun (for example, *record*, *display*, and *report*). Use concrete nouns and active verbs to express the meaning of a sentence.

Correct	Incorrect
They <i>considered</i> (v) all the facts.	They took all facts into <i>consideration</i> (n).
The new company <i>negotiated</i> (v) salaries and benefits.	The new company undertook a <i>negotiation</i> (n) for salary and benefits.
<i>Search</i> (v) for and <i>replace</i> (v) incorrect terminology in the document.	Perform a terminology <i>search-and-replace</i> (n) in the document.
<i>Scan</i> (v) the product barcode.	<i>Barcode-scan</i> (n) the product.
<i>Record</i> (v) the test results in the employee's file.	<i>Record</i> (v) the test results in the employee's <i>record</i> (n).
View settings for refresh rate, color, and <i>display resolution</i> (n).	<i>Display</i> (v) settings for refresh rate, color, and <i>display</i> (n) resolution.

### Noun strings

Noun strings are phrases composed of consecutive nouns, where the final noun is modified by the nouns that precede it.

Avoid noun strings whenever possible, as they can cause readers to work harder to understand the content. To rewrite a noun string, work backward and change nouns to verbs, verb forms, and prepositional phrases.

Correct	Incorrect
You must sign a form authorizing the disclosure of your medical information.	You must sign the <i>medical information disclosure authorization</i> form.
This release features a new search filter for virtual care.	This release features a new <i>virtual care search filter</i> .
Cathy had to complete a course for managing conflict in the workplace.	Cathy had to complete a <i>workplace conflict management course</i> .

## Positive versus negative constructions

Negative construction is a method of constructing a sentence by expressing what *is not*, as opposed to what *is*.

Avoid negative construction and state information positively whenever possible. Tell readers what to do and the reason, rather than what not to do. Using *not* or other negatives can make sentences harder to read and comprehend.

Positive construction	Negative construction
Save your work, and then turn off your computer.	<i>Do not</i> turn off your computer without first saving your work.
You must first log on to access the database.	You <i>cannot</i> access the database without first logging on.
Scan your badge to unlock the drawer.	All drawers <i>are locked</i> unless in use.

## Plural constructions

Plural constructions denote more than one of something:

- Do not use *and/or* when referring to conditional plurals.
- Do not use *(s)* for terms to indicate a possible plural; instead, use the plural form. For example, write *features* instead of *feature(s)*.
- Form the plural of an acronym by adding *s* with no apostrophe

Correct	Incorrect
one or more customers	customer and/or customers
rewards	reward(s)
APIs, CPUs, PDFs	API's, CPU's, PDF's
Syntellis' Axiom 365 Syntellis' employees	Syntellis Axiom Solutions' Axiom 365 Syntellis's employees

## Prepositions

A preposition is a word or set of words that indicate the relationship between a noun or a pronoun and another word in a sentence.

Common prepositions include:

- with
- at

- from
- into
- during
- for

Avoid prepositions whenever possible and use a preposition only to prevent an exceptionally long or awkward sentence.

Correct	Incorrect
Enter the criteria on which to search.	Enter the criteria you want to search on.
Select the provider with whom the patient is associated.	Select the provide that you want to associate the patient with.

## Undefined pronouns (this and it)

Undefined pronouns occur when a pronoun does not relate to the antecedent or is part of vague sentence construction.

Two of the most common undefined pronouns are *this* and *it*. To correct an undefined pronoun in a sentence, provide a noun so that users are clear about the thing to which you are referring.

Correct	Incorrect
This <i>error</i> occurs when...	<i>This</i> occurs when...
This <i>code change</i> affects all customers on the current release.	<i>This</i> affects all customers on the current release.
Verify that the <i>Customer Code</i> contains the correct value.	Verify that <i>it</i> contains the correct value.

## Verbs

Verbs describe an action, state, or occurrence, and form the main part of the predicate of a sentence.

### Verb tenses

Verb tenses indicate to readers *when* actions take place. This information can help users understand workflows and the sequence of events or actions within an application.

Choosing the correct verb tense makes text easier to read and translate. In release notes, describing the issue in past tense and the resolution in present tense helps readers quickly identify the current state of the software.

Tense	Definition	Examples
Future	Use future tense only when actions occur in the future.  You can also use future tense with conditional statements.	Coming soon, Syntellis <i>will</i> add exciting new features to Rolling Forecasting.  If the code you entered does not exist, a message indicates that it will be added to the library upon saving.
Present	In most instances, simple present tense indicates actions that take place as users read.	New training modules <i>are</i> available for Syntellis Healthcare customers.  The confirmation message now correctly <i>confirms</i> that plan files are available.
Past	Simple past tense helps readers quickly identify a past issue or condition.	When users created new plan files using the Process Plan Files option, the confirmation message incorrectly <i>stated</i> that no plan files were created.

### Imperative verbs

Use imperative verbs to create sentences that give orders or commands. The subject of an imperative sentence is usually implied, not stated, as it is giving a direct order. This type of sentence is most often used to communicate instructions.

In most cases, use active voice and imperative verbs, which is more forceful and direct than passive voice. Avoid weak, vague verbs such as *be*, *has*, *make*, and *do*. Weak verbs are frequently used with passive voice.

Correct	Incorrect
<i>Back up</i> your files.	<i>Do a backup of</i> your files.
<i>Update</i> the information.	<i>You can</i> update the information.
Users often <i>have difficulty</i> understanding the complex calculations.	The complex calculations <i>can be</i> difficult for users to understand.

### Other verb forms (perfect tense, progressive tense)

In technical writing, avoid forms of perfect tense and progressive tense because these verb forms are wordier than simple present, past, or future tense.

Simple present tense (preferred)	Present progressive tense (avoid)
If you <i>upgrade</i> to the current release, you must back up all previous files.	If you <i>are upgrading</i> to the current release, <i>backing up</i> previous files is required.
Customers who <i>experience</i> errors should contact Customer Support immediately.	Customers who <i>are experiencing</i> errors should contact Customer Support immediately.
Simple past tense (preferred)	Past perfect tense (avoid)
In this release, several enhancements <i>were</i> made to support automated updates.	In this release, several enhancements <i>have been</i> made to support automated updates.
In this release, Syntellis <i>made</i> several enhancements to support automated updates.	In this release, Syntellis <i>has made</i> several enhancements to support automated updates.
After users modify their information, an icon indicates that the data <i>was</i> updated.	After users modify their information, an icon indicates that the data <i>has been</i> updated.

### Transitive and intransitive verbs

A transitive verb takes a direct object, which is the receiver of the action of the verb. An intransitive verb does not have a direct object.

- Do not use transitive verbs as intransitive verbs.
- Do not use the following transitive verbs (or plural forms of these verbs) without objects in active constructions:
  - complete
  - configure
  - display
  - install
  - open
  - print
  - process

Transitive verbs (correct)	Intransitive verbs (incorrect)
The page <i>displays</i> information. Information <i>is displayed</i> in the window.	The page <i>displays</i> . The window <i>displays</i> .
Restarting the application <i>completes</i> the setup process.	After you restart the application, the setup process <i>completes</i> .
Run the report first before <i>printing</i> it.	After running the report, it <i>prints</i> .
Clicking <b>Save</b> and <b>OK</b> in succession <i>opens</i> the window.	Click <b>Save</b> and <b>OK</b> in succession, and the window <i>opens</i> .

## What versus which

*What* and *which* are often confused in usage.

Use *what* when referring to an unknown number and *which* when the number of choices is limited or finite

Correct	Incorrect
<i>Which</i> finger was broken? (finite number of fingers)	<i>What</i> finger was broken?
<i>What</i> are your favorite types of movies? (unknown number of types)	<i>Which</i> are your favorite types of movies?

## Which versus that

*Which* and *that* are often confused in usage.

*That* introduces a restrictive clause, which is essential for the sentence to make sense. A restrictive clause often defines the noun or phrase preceding it and is not separated from it by a comma. In general, include the word *that* in restrictive clauses to improve flow, readability, and comprehension and to prevent ambiguity.

*Which* introduces a nonrestrictive clause, which is a clause that could be omitted without affecting the meaning of the sentence. It is always preceded by a comma. Nonrestrictive clauses often contain auxiliary or parenthetical information.

Use *which* instead of *that* as a conjunction that introduces a nonrestrictive clause (one that is not necessary to the full meaning of the statement).

Correct	Incorrect
You must submit to a drug screening, <i>which</i> might eliminate you from employment consideration.	You must submit to a drug screening, <i>that</i> might eliminate you from employment consideration.
The report lists all errors <i>that</i> occurred in the past 24 hours.	The report lists all errors <i>which</i> occurred in the past 24 hours.

## Who versus that

*Who* and *that* are often confused in usage.

As a general rule, use *who* when discussing a person and *that* when discussing an object

Correct	Incorrect
Custom Setup options are for experienced users <i>who</i> want to alter the standard Windows configuration.	Custom Setup options are for experienced users <i>that</i> want to alter the standard Windows configuration.

# Punctuation

Correct English punctuation helps us communicate ideas clearly and accurately. Punctuation provides a logical structure that makes technical information easier to read, understand, and translate

## Apostrophes

Use apostrophes to indicate possession (possessive noun case) and to indicate a missing letter in a contraction. Plurals are formed by adding *s*, *es*, *i*, or *ae* to the end of terms and acronyms.

Do not use apostrophes to form plurals or when referring to dates (for example, the *1990's*).

Examples:

- The Product *Manager's* report is due tomorrow. (singular possessive)
- The Product *Managers'* meeting was a success. (plural possessive)
- The *packages* were shipped on time. (plural)
- Use one of these three *URLs* to access account information. (plural)
- The audience liked music from the *1990s*. (plural)

## Commas

Commas indicate a pause between parts of a sentence. Additionally, commas separate items in a list and separate every three digits in a large numeral.

Use commas before conjunctions such as *as*, *and*, *but*, *or*, *nor*, *for*, *so*, and *yet* that join two complete sentences or independent clauses (for example, "*Robert spoke, and then he sang*"). In a series consisting of at least three elements, use serial commas to separate the elements.

### Commas in introductory clauses

Use a comma following an introductory clause.

Correct	Incorrect
After several attempts, the customer updated the software.	After several attempts the customer updated the software.
In your profile, enter your address, email, and phone number, and upload your photo.	In your profile, enter your address, email and phone number and upload your photo.

### Serial commas

Use commas to separate list items if the list is simple, such as a list of words. Use semicolons only if the list is complex, such as a list that contain clauses or items that already contain commas or conjunctions.

When a conjunction joins the last two elements in a series, use a serial comma (Oxford comma) before the conjunction.

Correct	Incorrect
Chapter 10 is an alphabetical reference for commands, procedures, and related topics.	Chapter 10 is an alphabetical reference to commands, procedures and related processes.
Access Server Manager and click <b>Roles Summary</b> .	Access Server Manager, and click <b>Roles Summary</b> .

## Dashes

When it is necessary to use dashes to set off text for emphasis or another reason, use a space before and after the dash.

### Em Dash

Use the em dash (–) with spaces to set off a phrase in a sentence, much as you would parentheses.

Examples:

- Email format is invalid – This error occurs when the email format is invalid.
- One or more engineers investigates the issue, fixes it – *or ensures that someone fixes it* – and restarts the system

### En Dash

Use the en dash (–) with spaces before and after the dash between a range of dates.

Examples:

- 1959 – 60
- January 1 – March 31

Correct	Incorrect
Your password can be from 8 – 16 characters and include lowercase, uppercase, numbers, and special symbols.	Your password can be from 8-16 characters and include lowercase, uppercase, numbers, and special symbols.
The Customer Support Desk is available <i>Monday – Friday</i> from 8 AM – 4 PM CT.	The Customer Support Desk is available <i>Monday–Friday</i> from 8 AM-4 PM CT.

## Exclamation point

Use exclamation points sparingly and only in rare instances to express emphatic expressions. Use a simple period for mildly exclamatory sentences or a descriptive, concrete noun or active verb in place of an exclamation point.



- Do not use ellipsis in documentation, except in code syntax to indicate omitted code in technical material.
- Do not use ellipsis in column headings.

## Hyphens and hyphenation

Hyphens are punctuation marks that join multiple adjectives to indicate a combined meaning or linkage, the division of a word at the end of a line, or a missing or implied element.

Examples:

- Syntellis offers toll-free numbers for customers to contact us with questions.
- Many users prefer to make long-distance calls from their mobile devices.

If you are in doubt about whether to hyphenate a modifier, the trend is toward *less hyphenation*. If the term is not confusing or ambiguous, do not hyphenate it. However, if omitting the hyphen makes the term more difficult to understand, include the hyphen.

Guidelines:

- Hyphenate two or more words that precede and modify a noun as a unit if confusion might result.

Examples:

- lower-left corner
- read-only memory
- floating-point decimal

- Hyphenate two words that precede and modify a noun as a unit if one of the words is a past or present participle.

Examples:

- HIPAA-protected information
- age-related illness

- Hyphenate compound numerals and fractions.

Examples:

- sixty-fifth birthday
- one-third of affected customers

- When necessary for clarity, hyphenate words with double letters only if users might be confused or the meaning is unclear.

Examples:

- re-edit
- re-engineered

- Do not hyphenate adverbs ending in *-ly* and the verb or adjective it modifies.

Examples:

- structurally sound
- smartly dressed
- closely related

Check the [American Heritage Dictionary of the English Language](#) for the currently accepted spelling. For example, at one time, the word *email* required hyphenation, but it is no longer hyphenated.

## Parentheses

Parentheses are punctuation marks that set off a word, clause, or sentence and are inserted as an explanation or afterthought into a passage that is grammatically complete without it.

Generally, parentheses should be in the font style of the context of the sentence. For example, the text within parentheses might be italicized, but the parentheses themselves should be Roman if the surrounding text is Roman.

- When part of a sentence falls inside parentheses and part falls outside, place the period outside.
- When a whole sentence falls inside parentheses, place the period inside.

Correct	Incorrect
Students completed several psychology courses (such as social, personality, and clinical).	Students completed several psychology courses (such as social, personality, and clinical.)
(Several other courses were offered, but they were not as popular.)	(Several other courses were offered, but they were not as popular).

## Periods

Periods are punctuation marks that indicate a full stop or the end of a sentence.

- Use only one space after a period in both printed and online documentation.
- Set periods in the character formatting (Roman, bold, or italic) of the preceding word. If the preceding word is a command, option, keyword, placeholder, part of a code sample, or user input that requires other formatting, use Roman for the punctuation to avoid confusion.
- When referring to a type of file name extension, precede it with a period, as in *.prd* extension or *an .exe file*.

## Quotation marks

Quotation marks are used in pairs to set off direct speech, a quotation, or a phrase. The pair consists of an opening quotation mark and a closing quotation mark.

Place commas, periods, and question marks inside quotation marks, and place semi-colons and colons outside of the quotation marks. We do not typically use single quotation marks in technical documentation. However, for instances in which single quotation marks are required, place commas and periods inside the closing quotation mark.

The following table identifies where to place specific types of punctuation in relation to the closing quotation mark.

Punctuation	Location	Example
Period	Inside	Customers who participated in the survey described themselves as “experienced” and “technical.”
Comma	Inside	Some feedback comments were characterized as “informative,” “detailed,” and “helpful.”
Parentheses	Outside	One customer expressed that “although the training was informative, I would not recommend the course to experienced developers” (p. 4).
Semi-colon	Outside	At the beginning of the study, participants described their proficiency score as “low to moderate”; at the end, they described it as “moderate to high.”

## Semicolons

Semicolons indicate a pause between two main clauses that is more pronounced than the pause indicated by a comma.

Use semicolons sparingly, especially for technical documentation, as they can make a sentence overly complex and difficult to comprehend. Sometimes, a conjunctive adverb (however, otherwise, therefore) can improve readability.

Examples:

- Members are advised against sharing their passwords; however, family members or caretakers might need access to their health information.
- Reports of user errors increased dramatically after the new release; therefore, more support staff were needed.

Unless the independent clauses are very closely related, use two sentences instead of a semi-colon.

## Slash mark

The slash is a slanting line most often used to represent division, fractions, date separations, and implied combinations. The slash rendered in reverse is known as the *backslash*, and is typically used in computing.

Use *slash* (or *backslash*):

- Between the numerator and denominator of fractions in equations that occur in text
- In constructions that imply a combination (for example, *on/off* switch)
- To separate parts of an internet address such as the protocol name (for example, *http://mslibrary.com/catalog/collect.doc*)
- When referring to server, folder, and file names (for example, *\\mslibrary\catalog\collect.doc*)

Do not use *slash* (or *backslash*):

- In sentence constructions to indicate a choice, such as *either/or* and *and/or*
- To separate two verbs (for example, Open the File menu and *open/close* the file)

## Screen captures and graphics

Use screen captures judiciously and only when an image enhances comprehension or illustrates a complex concept or page. Avoid using screen captures after every step in a procedure (as confirmation of a user action) or repeating the same screen capture in different tasks within a chapter.

### Screen captures

Consider the following when determining whether to use screen captures:

- Any small change in the application that affects the interface, such as minor rebranding or color changes, requires new screen captures, which is extremely time-consuming.
- Accurate demo data and setup can be cumbersome and time-consuming for SMEs.
- Screen captures increase the file size of PDF files and printed deliverables. Eliminating unnecessary images can reduce the page count of PDF files.
- Screen captures can increase production time.

However, screen captures are effective (and often necessary) when the interface is complex and can enhance or clarify the topic.

Guidelines:

- Make screen captures large enough for the audience to read all relevant details.
- If the screen capture calls attention to a specific control or menu, capture only the immediate area surrounding that control rather than the entire page.
- Avoid capturing empty areas of a page.
- Capture and crop images carefully.
- Use a standard Windows color theme for screen captures.
- Capture screens without the title bar to prevent rework if the product name changes.
- Do not use figure numbering or captions for images and graphics.
- Do not capture the cursor unless it is useful for readers.
- Do not use inline images within text or embed icons within sentences.
- Maintain confidentiality and compliance with all HIPAA compliance requirements by blurring all private patient information.
- Hide your personal bookmarks, favorites bar, and task bar when capturing screens.

## Thumbnails

Use thumbnail images to condense screen captures so that they take up less space. Users expand the thumbnails to full-size screen captures by clicking them.

## Specifications

### Alignment

Left-justify Images to align with the paragraph.

Indent images to align with the first character of a numbered step or bullet.

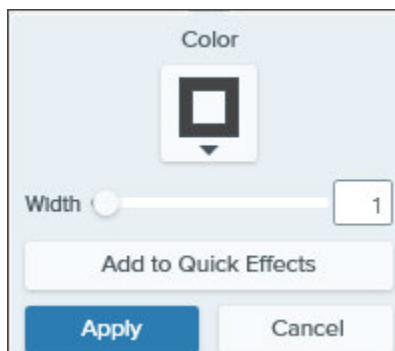
### Borders

Guidelines:

- Color: R:68 G:68 B:68; Hex #444444



- Thickness: 1 px (Flare) or 1 pt (SnagIt)



- Do not apply borders for diagrams and other illustrations that are not screen captures.

## **Callouts and annotations**

Guidelines and best practices:

- Use approved corporate brand color themes.
- Save the editable source file in addition to the .png file so that you can easily modify the annotations if needed. For example, save the image as a .snag file in SnagIt.

## **Figure numbering and captions**

We do not use figure numbering or captions in customer-facing documentation.

## **File types**

Save most images as a .png file type.

## **Quality and size**

To maintain consistency across screen captures, keep the application window the same size each time you capture.

## User-centered writing strategies

User-centered writing focuses on making documentation usable, useful, and easy to understand. As technical writers, a user-centered approach requires that we thoroughly understand and empathize with our target audience, including their constraints and preferences.

### User-centered writing

User-centered writing focuses on how users really consume technical content.

Research suggests that online users:

- Search for specific bits of information.
- Jump from topic to topic.
- Read quickly.
- Skip what they know.
- Scan content in an unpredictable pattern.

Many users are too busy to read through dense documentation. Other users never consult documentation or use it only as a last resort.

We should anticipate that users might be stressed or frustrated when they turn to documentation. The user-centered approach eliminates bulky blocks of text in favor of scannable content that is designed to answer users' questions.

### What's different about user-centered writing?

User-centered writing provides *only the content that users really need and adapts to the audience* as much as possible.

User-centered writing:

- Presents information in an action-oriented approach
- Focuses on accomplishing tasks
- Supports reading to learn and do
- Supports error recognition and recovery
- Uses simple language
- Presents information in short sentences, paragraphs, and lists

### Guiding principles

When writing documentation, use an action-oriented approach that helps users avoid errors and quickly access information.



Present information in an action-oriented approach:

- Explain concepts.
- Emphasize tasks.
- Follow a straightforward workflow.

Present information according to the user's perspective:

- Describe task objectives or goals, not the UI.
- Help users avoid errors.
- Promote established best practices.

Help users access the information they need:

- Organize content that supports workflows
- Use intuitive headings
- Provide informative conceptual information and tasks

## User-centered document design

User-centered document design leads to improved usability, comprehension, and accessibility.

User-centered documentation is:

- Task-oriented, accurate, and complete (usable)
- Clear and concise (easy to read and comprehend)
- Predictable, scannable, and visually effective (accessible)

We apply the following concepts to all levels of our writing to support how users read documentation:

- TOC (Table of Contents) level
- Topic level
- Sentence level

### TOC-level design

TOC-level design presents information in a logical flow or common path that helps users quickly locate solutions and answers to questions. This design strategy:

- Presents a logical hierarchy of information
- Never assumes that users read sequentially
- Orients users to locations and situations
- Presents the most common path
- Layers information as primary and secondary
  - Primary information is immediately useful and essential
  - Secondary information provides background and is needed by fewer users

- Uses consistent navigation, location, and terminology
- Uses high-level organizers or a recognizable scheme for lists and tables.

### **Topic-level design**

Topic-level design uses intuitive titles and informative short descriptions to help users decide whether to keep reading.

User-centered topics and sections:

- Are modular and independent.
- Focus on the primary user.
- Have titles that reveal the objective or goal.
- Present summary or business purpose information first (general to specific).
- Identify prerequisites and preconditions.
- Present just enough information to learn concepts or complete tasks.
- Provide real-world examples and scenarios.
- Avoid obvious result statements.
- Avoid unnecessary information or circular descriptions.
- Use images judiciously.

### **Sentence-level design**

Sentence-level design streamlines content using simple, straightforward language, providing only essential information, and applying consistent terminology.

User-centered sentences, tables, and lists:

- Use active voice and present tense.
- Address users directly.
- Use imperative verbs for steps and instructions.
- Use straightforward sentences and simple language.
- Spell out acronyms.
- Avoid false subjects (*it is, there is, there are*) at the beginning of sentences.
- Avoid using noun forms as verbs.
- Avoid unnecessary infinitive sentences.

## BLUF and SVO

Use *Bottom Line Up Front* (BLUF) and *Subject-Verb-Object* (SVO) constructions whenever possible.

- BLUF presents conclusions and recommendations at the beginning to facilitate rapid decision-making.
- SVO places the subject towards the beginning of the sentence and reduces complexity.

SVO/BLUF constructions	Vague constructions
The care team (s) decides (v) whether the initial diagnosis (o) is accurate after evaluating the patient.	After evaluation of the patient, whether a diagnosis is accurate is determined by the care team.
The care team (s) approves (v) the proper medications (o).	The focus of the care team is to approve the proper medication.
Complete the prerequisites for this course.	There are several prerequisites that must be completed for this task.
Lab techs collect specimens.	The function of the lab tech is to collect specimens.

## Scannable content

Users usually *scan* (rather than thoroughly read) topics for specific information. We can improve the user's ability to quickly read and scan information by using the following strategies:

- Reformat serial lists with three or more elements as bulleted lists.
- Write clear, concise sentences and break apart long sentences and paragraphs.
- Include useful information directly in steps.
- Write short, consistent topic titles and headings.
  - Use plural constructions to avoid unnecessary articles (a, an, the).
  - Use consistent capitalization and verb forms.
- Delete redundant or unnecessary results statements that are self-evident and expected.
  - Changes in navigation that match the previous action or option
  - Results for clicking labeled UI controls (OK, Next, Continue, Save, Discard)
- Delete common Windows functionality:
  - Entering search criteria
  - Selecting from drop-down lists
  - Expanding and collapsing lists
  - Sorting information in columns
  - Resizing and closing windows

## Streamlined content and simple language

To write streamlined content, provide only the necessary information and use simple, straightforward language. Eliminate intuitive or self-evident information such as circular field descriptions, explanations of standard Windows functionality, or expected results statements. Ensure that your content focuses on essential information and how to perform tasks.

Characteristics of streamlined content:

- Focuses on critical information
- Helps users avoid errors and resolve issues when errors occur
- Uses fewer words in an action-oriented context
- Reduces obvious results and unnecessary descriptions
- Eliminates ROT (redundant, outdated, trivial) content

### Tips for writing streamlined content

- Improve scannability by using bulleted lists instead of serial lists.
- Provide only the information that is critical for users.
- Create intuitive headings, captions, and callouts that reveal the task or goal.
- Keep paragraphs and sentences short.
- Use tables to define ambiguous icons or controls.
- Use imperative verbs to begin steps.
- Include nonintuitive information in steps rather than in separate notes.
- Paraphrase longer system messages and include the preferred user response.
- Avoid including UI control names such as buttons, lists, windows, and fields (for example, *Click Continue* instead of *Click the Continue button*).
- Avoid duplicating information in multiple topics.
- Avoid providing specific locations and descriptions of fields and UI controls.
- Avoid circular definitions and instructions (for example, *Enter the address in the Address field*).

### Unnecessary words and phrases (throw-away words)

To create concise documents, eliminate excessive and unnecessary words. Content that reflects straightforward language, simple sentence construction, and consistent terminology improves comprehension and memorability.

Help readers understand technical content by using simple, direct language:

- Simple present tense
- Second-person, active voice (you or users)
- Plural constructions (to avoid subject/verb disagreement and he/she constructions)

- Consistent terminology
- Parallelism in lists and steps
- Short paragraphs with one central theme

Use Find and Replace (Ctrl + F) functionality to quickly search for unnecessary words and throw-away phrases.

Direct language	Throw-away phrases
after	subsequent to following on
about	in reference to with regard to concerning the matter of where...is concerned
although	despite the fact that regardless of the fact that
as	at the same time as simultaneously with as well as
because	the reason for for the reason that due to the fact that in light of the fact that considering the fact that on the grounds that this is why
before	prior to in anticipation of
can	is able to has the opportunity to has the ability to enables the user to choose to

Direct language	Throw-away phrases
could	the possibility exists that it could occur that
the page displays	a message is displayed that says
even even though	regardless of the fact that notwithstanding
if	in the event that if it happens that under circumstances in which
may	it is possible that there is a chance that
might	it is possible that there is a chance that
must	it is crucial that it is necessary to there is a need to it is important that
note	note that it is important to note than remember that keep in mind
should	there is a need to it is important that it is incumbent upon you to
sometimes	there may be instances in which you might find that
to	in order to if you need to if you want to

Direct language	Throw-away phrases
users can	the user can choose to you can choose to the feature enables the user to the option enables you to
when	on the occasion of in a situation in which under circumstances in which

## User interface

As we document the user interface (UI), we can make learning easier for users by not forcing them to learn different terms for each product, feature, or task. Reducing the burden on our users ensures consistent presentation and terminology.

In general, follow the [Microsoft Style Guide](#) for UI terminology.

### UI text writing style

This section contains guidelines for writing and editing user interface (UI) text, such as dialogs and messages, tooltips, and labels for headlines, column headings, and buttons.

The general writing style for UI text should be nontechnical and easy to understand.

Guideline	Description
Active voice	<p>Use active voice so that users understand who or what performs an action.</p> <p>Examples:</p> <ul style="list-style-type: none"><li>• Update the registration information and click <b>OK</b>.</li><li>• Back up your files before upgrading the software.</li></ul> <p>See <a href="#">Active versus passive voice</a>.</p>
Capitalization	<p>Use sentence case for the following elements:</p> <ul style="list-style-type: none"><li>• Topic titles, Pendo titles and headings</li><li>• Hyperlinks</li><li>• Menu items</li><li>• Column headers</li><li>• Call-to-action controls (buttons)</li><li>• Checkbox text</li><li>• Radio button text</li></ul> <p>Use title case for the following elements:</p> <ul style="list-style-type: none"><li>• Company name</li><li>• Product names, modules and suites (for example, Rolling Forecasting, Financial Institutions Suite)</li><li>• Other proper nouns</li><li>• Third-party products (Microsoft, JavaScript, and so)</li><li>• Acronyms (ALL CAPS)</li></ul>



Guideline	Description
Contractions	<p>Avoid contractions in UI messages.</p> <p>For Pendo content, consult Marketing for their use of contractions.</p>
Ellipsis	<p>Use the ellipsis symbol instead of three periods (...).</p> <p>Avoid using the word <i>More</i>.</p>
Imperative verbs	<p>In most messages and dialogs, use imperative verbs with active voice to create commands or communicate instructions.</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• Delete all unnecessary files.</li> <li>• Contact Customer Support if you experience errors.</li> </ul> <p>Verify that the information in the report is correct.</p>
Pronouns	<p>Avoid pronouns that refer to Syntellis.</p> <p>Correct:</p> <ul style="list-style-type: none"> <li>• <i>Syntellis is</i> pleased to announce...</li> <li>• <i>Syntellis recently</i> upgraded your experience...</li> <li>• <i>Syntellis will</i> contact you as soon as possible.</li> </ul> <p>Incorrect:</p> <ul style="list-style-type: none"> <li>• <i>We're</i> pleased to announce...</li> <li>• <i>We've</i> upgraded your experience...</li> </ul> <p><i>We will</i> contact you as soon as possible.</p>
Simple tense	<p>Use simple present, past, or future tense in messages and dialogs. Avoid progressive or perfect tense.</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• New training modules are available for Syntellis Healthcare customers.</li> <li>• Users were previously notified about system errors.</li> <li>• If the code you enter does not exist, it will be added to your library.</li> </ul> <p>See <a href="#">Verb tenses</a>.</p>
Tone	<p>Use a neutral and polite tone.</p> <p>Avoid adjectives in messages that convey judgment or emotions, such as <i>success</i>, <i>fail</i>, <i>sorry</i>, and <i>failure</i>.</p> <p>Avoid <i>please</i> in commands and instructions.</p>

## UI text terminology

Although the Microsoft Style Guide recommends using *select* instead of *click* when instructions are not specific to using a mouse, Syntellis documentation uses *click* consistently. Currently, Syntellis applications are designed to be used on desktop computers rather than phones or tablets.

Term	Usage
Click	Select an item with the mouse and click the left mouse once. Don't use <i>click on</i> . Use <i>click</i> (or, in certain cases double-click or right-click) when interacting with the following: <ul style="list-style-type: none"><li>• Arrows</li><li>• Navigation</li><li>• Command buttons (labeled buttons)</li><li>• Icons</li><li>• Hyperlinks</li><li>• Tabs</li></ul>
Click in	Click inside the general area within a page, window, field, or other UI location to enter text or make selections.
Double-click	Double-click an item by clicking the mouse twice in rapid succession. Hyphenate.
Drag	Hold down a button while moving the mouse, and then release the button. Don't use <i>click and drag</i> or <i>drag and drop</i> .
Enter	Press the Enter key after making selections or typing values or text.
Hover (over)	Move the mouse pointer over an area of the UI without selecting it.
Navigation	Use cascading menus for navigation steps (for example, write <i>File &gt; Open</i> instead of <i>On the File menu, click Open</i> ).
Press	Use when referring to specific keys or key combinations ( <i>press Ctrl+Z</i> ).
Right-click	Click an item by using the secondary mouse button (typically, the right mouse button).
Rotate	Refers to the third or middle button on the mouse. Users <i>rotate the wheel</i> or <i>click the wheel</i> button.

Term	Usage
Select	<p>Hold down the left button and mark text, objects, cells, or other items on which users take action, such as copying or moving rows.</p> <p>Use <i>select</i> when referencing the following:</p> <ul style="list-style-type: none"> <li>• Checkboxes and radio buttons</li> <li>• Items from a list</li> <li>• Nested menu selections (select <b>File</b> &gt; <b>Open</b>)</li> </ul>

### UI controls

UI controls are the building blocks for the look and feel of an application. Examples of UI controls include menus, fields, windows, and lists. With a few exceptions, do not include the type of UI control in the text (for example, *click the **Save** button*) unless the meaning is unclear without it.

Use the Microsoft Style Guide for general guidance on UI actions and formatting.

UI element	Guidelines
Buttons	<p>Use sentence case for all UI controls</p> <p>Avoid articles (<i>a</i>, <i>an</i>, and <i>the</i>).</p> <p>Use the following preferred verbs for button labels:</p> <ul style="list-style-type: none"> <li>• OK</li> <li>• Save</li> <li>• Cancel</li> <li>• Clear</li> <li>• Configure</li> <li>• Next</li> <li>• Reset</li> </ul>
Checkboxes	<p>Use descriptive phrases with as few words as possible to clearly convey the meaning. Avoid the following in labels and descriptions:</p> <ul style="list-style-type: none"> <li>• Select (redundant)</li> <li>• Question marks or punctuation</li> <li>• Negative phrases (for example, "Don't show this on the page")</li> </ul> <p>Use sentence case for accompanying text.</p> <p>Present the default option first.</p> <p>Do not use punctuation, such as periods or question marks.</p>

UI element	Guidelines
Hyperlinks	<p>Link text should describe the destination or contents of the page.</p> <p>Avoid using <i>Click here</i> or inserting the actual URL.</p>
Lists	<p>Use a list when the number of options is seven or more or when layout space is limited.</p> <p>Use sentence case for option text.</p>
Menus	<p>For menu options, always use a paired verb and noun as menu text.</p> <ul style="list-style-type: none"> <li>• <i>Add calculation</i></li> <li>• <i>Configure report</i></li> </ul>
Pages Tabs Reports Tables Features	<p>Use title case for the proper names of pages, reports, and features. Do not capitalize the descriptive term (page, tab, report, table, or feature).</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• <i>Axiom Designer</i> tab</li> <li>• <i>Process Directory</i> page</li> <li>• <i>Data Compliance Audit</i> report</li> <li>• <i>Axiom Calculations</i> table</li> <li>• <i>Intelligence Center</i></li> <li>• <i>Visual Insights</i></li> </ul> <p>Use <i>in</i> when referring to pages, tables, and fields.</p> <p>Use <i>on</i> when referring to tabs and pages.</p>
Radio buttons	<p>Use descriptive phrases with as few words as possible to clearly convey the meaning. Avoid the following in labels and descriptions:</p> <ul style="list-style-type: none"> <li>• Select (redundant)</li> <li>• Question marks or punctuation</li> <li>• Negative phrases (for example, "Don't show this on the page")</li> </ul> <p>Use sentence case.</p> <p>Present the default or most probable option first.</p> <p>Do not use punctuation such as periods or question marks.</p>
Section names Column headers	<p>Use sentence case, in which only the first word is capitalized except for proper nouns.</p>
Selection lists	<p>Use as few words as possible.</p> <p>Use sentence case unless referring to proper names.</p> <p>Alphabetize the list.</p>

## Preferred terminology and phrases

This chapter includes common words and phrases that are often used incorrectly in writing and can become confusing for non-native English readers. Using consistent terminology helps us avoid ambiguity and create a successful user experience.

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

### A

Term	Guideline	Examples
about (versus on)	Use <i>about</i> rather than <i>on</i> when referring to information.	Preferred: See the Installation instructions for more information <i>about</i> configuration options.  Avoid: See the Installation instructions for more information <i>on</i> configuration options.
above (below)	Avoid <i>above</i> and <i>below</i> when referring to content in the same topic or deliverable. In PDFs, text or images might not occur together on the same page.  Instead, use <i>preceding</i> and <i>following</i> .	Preferred: <ul style="list-style-type: none"> <li>• The following diagram explains the registration process.</li> <li>• The previous information does not apply to part-time employees.</li> </ul> Avoid: <ul style="list-style-type: none"> <li>• The diagram <i>below</i> explains the registration process.</li> <li>• The <i>above</i> information does not apply to part-time employees.</li> </ul>
ad hoc	<i>Ad hoc</i> is a Latin term that appears in context with unplanned actions, such as generating on-demand reports or documents for a specific purpose.  Do not use; instead, use <i>on-demand</i> or <i>unscheduled</i> .	Users can create <i>on-demand</i> reports.  See <a href="#">Latin abbreviations and phrases</a> .
affect (effect)	<i>Affect</i> is a verb that means <i>to influence</i> .  <i>Effect</i> can be a verb or a noun. As a noun, it means result. As a verb, it means <i>to bring about</i> .	The situation <i>affected</i> me deeply.  The <i>side effects</i> of the vaccine are significant ( <i>noun</i> ).  She <i>affected</i> her teammate's behavior ( <i>verb</i> ).

Term	Guideline	Examples
after (versus <i>once</i> )	<p>Use <i>after</i> to express a relative point in time.</p> <p>Use <i>once</i> when indicating a single instance or occurrence. Do not use <i>once</i> instead of <i>after</i> or <i>when</i>.</p>	<p>Preferred:</p> <ul style="list-style-type: none"> <li>• Complete the registration process <i>after</i> installing the software.</li> <li>• You are not required to log on more than <i>once</i>.</li> </ul> <p>Avoid:</p> <ul style="list-style-type: none"> <li>• Complete the registration process <i>once</i> the software installation is complete.</li> <li>• You can register for benefits <i>once</i> you complete onboarding.</li> </ul>
allows (enables)	<p>Avoid relying on <i>allows</i> and <i>enables</i> when discussing functionality unless you are documenting security or access permissions.</p> <p>In most cases, you can avoid using either <i>allows</i> or <i>enables</i> by rewriting the sentence. Begin the sentence with an imperative phrase or place the subject at the beginning of the sentence.</p>	<p>Preferred:</p> <ul style="list-style-type: none"> <li>• Use the guidelines to create consistent documentation.</li> <li>• Guidelines help writers create consistent documentation.</li> <li>• Writers use guidelines to create consistent documentation.</li> <li>• Cost estimates aid users in selecting affordable healthcare.</li> <li>• Users can select affordable healthcare using cost estimates.</li> <li>• With cost estimates, users can select affordable healthcare.</li> </ul> <p>Avoid:</p> <ul style="list-style-type: none"> <li>• The guidelines allow writers to create consistent documentation.</li> <li>• Cost estimates enable users to select affordable healthcare.</li> </ul>
AM (PM)	Write as shown, in uppercase and without punctuation.	<p>9 AM; 12:30 PM</p> <p>See <a href="#">Dates, days, and times</a>.</p>
an	Use <i>an</i> before vowel sounds, including words beginning with a silent <i>h</i> or before acronyms or initialisms whose first letter is pronounced with a vowel sound at the beginning of the word (for example, the letter <i>N</i> is pronounced “ <i>en</i> ”).	<p><i>an</i> hour</p> <p><i>an</i> engineer</p> <p><i>an</i> NCAA athlete</p> <p><i>an</i> x-ray</p>

Term	Guideline	Examples
and/or	Avoid <i>and/or</i> , even in situations when both words are applicable.	<p>Preferred:</p> <p>The messages <i>and</i> any attachments are confidential.</p> <p>Avoid:</p> <p>The messages <i>and/or</i> attachments are confidential.</p>
antivirus	Write as one word; do not hyphenate.	<p>Correct:</p> <p>Verify that the <i>antivirus</i> software is installed and up to date.</p> <p>Incorrect:</p> <ul style="list-style-type: none"> <li>• Verify that the <i>anti-virus</i> software is installed and up to date.</li> <li>• Verify that the <i>anti virus</i> software is installed and up to date.</li> </ul>
application (versus app)	Use <i>application</i> , not <i>app</i> , to describe Syntellis desktop programs (software). Use <i>app</i> to describe mobile applications	<p>Install and configure the <i>application</i>.</p> <p>To register for a Microsoft Authenticator account, download the <i>app</i>.</p>
appears (displays)	<p>Use <i>appears</i> or <i>is displayed</i> when the sentence contains no direct object.</p> <p>Use <i>displays</i> when referencing a direct object.</p>	<p>Preferred:</p> <ul style="list-style-type: none"> <li>• A message <i>appears</i> on the page.</li> <li>• The report <i>displays</i> the most current income statement and balance sheet.</li> <li>• When an error occurs, an message <i>is displayed</i>.</li> </ul> <p>Avoid:</p> <ul style="list-style-type: none"> <li>• A message <i>displays</i> on the page.</li> <li>• The most current income statement <i>displays</i>.</li> </ul> <p>See <a href="#">Transitive and intransitive verbs</a>.</p>

Term	Guideline	Examples
appropriate	Avoid <i>appropriate</i> , as it can have a negative connotation; instead, use <i>applicable, recommended, or as needed</i> .	Preferred: <ul style="list-style-type: none"> <li>• Employees select the <i>recommended</i> courses for their role.</li> <li>• Users select the applicable option.</li> </ul> Avoid: Employees select the <i>appropriate</i> courses for their role.
associated (with)	As a transitive verb, (one that takes an object), <i>associate with</i> means to establish a link between two things (for example, a manager is associated with their employees).  <i>Associated to</i> is non-standard English; do not use.	The following managers <i>are associated with</i> these roles.  See <a href="#">Transitive and intransitive verbs</a> .
assure (ensure, insure)	To <i>assure</i> is to remove doubt or anxiety. <i>Ensure</i> guarantees an event or condition. <i>Insure</i> is reserved for financial liability, as in insuring a car.	The provider <i>assures</i> me that the claim is covered.  To <i>ensure</i> a successful result, read the documentation.  Drivers must <i>insure</i> their automobiles.
Axiom™	At the first occurrence in one-off marketing materials or Word documents, use a trademark symbol after Axiom, followed by the product name.  In technical documentation and online help, the copyright page includes all relevant copyright and trademark declarations.	Axiom™ Rolling Forecasting

## B

Term	Guideline	Examples
back up, backup	Use <i>back up</i> as a verb phrase. Use <i>backup</i> as a noun or an adjective.	<i>Back up</i> (v) all files before starting the installation process.  John does a <i>backup</i> (n) of his work files every Friday afternoon.  The team needs a <i>backup</i> (a) plan in case someone becomes sick.



Term	Guideline	Examples
barcode	Write as one word; do not hyphenate.	Security scanned the employee's <i>barcode</i> .
because (versus since)	Use <i>because</i> for phrases that include an explanation. Do not use <i>since</i> in place of <i>because</i> .  Use <i>since</i> only when indicating the passage of time.	Preferred: <ul style="list-style-type: none"> <li>• <i>Because</i> the installation replaces the existing version, you must reset your preferences.</li> <li>• <i>Since</i> the last update, several guidelines changed.</li> </ul> Avoid: <p><i>Since</i> the installation replaces the existing version, you must reset your preferences.</p>
below (above)	Avoid <i>above</i> and <i>below</i> when referring to content in the same topic or deliverable. In PDF files, text or images might not occur on the same page.  Instead, use <i>preceding</i> and <i>following</i> .	Preferred: <ul style="list-style-type: none"> <li>• The following diagram explains the registration process.</li> <li>• The previous information does not apply to part-time employees.</li> </ul> Avoid: <ul style="list-style-type: none"> <li>• The diagram <i>below</i> explains the registration process.</li> <li>• The <i>above</i> information does not apply to part-time employees.</li> </ul>
beside (versus next to)	Although both <i>beside</i> and <i>next to</i> are prepositions, their meanings differ slightly.  <i>Next to</i> refers to the location and means <i>immediately following</i> , whereas <i>beside</i> refers to <i>relative proximity</i> and can also mean <i>as well as</i> or <i>as compared with</i> .  Use <i>next to</i> when indicating the location of UI controls or options.	Preferred: <ul style="list-style-type: none"> <li>• Click the ellipsis <i>next to</i> the description.</li> <li>• Select the checkbox <i>next to</i> the option.</li> </ul> Avoid: <ul style="list-style-type: none"> <li>• Click the ellipsis <i>beside</i> the field.</li> <li>• Select the checkbox <i>beside</i> the required action.</li> </ul>
Bluetooth	Capitalize; <i>Bluetooth</i> is trademarked technology and considered a proper noun.	The headphones <i>use</i> Bluetooth technology

Term	Guideline	Examples
box (field)	Do not use <i>box</i> to describe an input element into which users enter data. Instead, use <i>field</i> .  (Not in alignment with the <a href="#">Microsoft Style Guide</a> .)	Complete the shipping and billing <i>fields</i> .
breadcrumbs	Do not use <i>breadcrumbs</i> to describe the path or navigation to the current location in the application or on the website.  Use <i>navigation</i> or <i>navigation path</i> .	Click <b>Reports</b> in the navigation.

## C

Term	Guideline	Examples
canceled, canceling, cancellation	Both <i>single l</i> and <i>double l</i> spellings are acceptable, but the <i>single l</i> spellings are most commonly used in the United States.	Preferred (in North America): <ul style="list-style-type: none"> <li>The manager <i>canceled</i> the meeting.</li> <li>Several members considered <i>canceling</i> their subscriptions.</li> <li>To opt-out, send an email indicating your <i>cancellation</i>.</li> </ul>
checkbox	Use <i>checkbox</i> , not <i>box</i> or <i>check box</i> , to refer to a checkbox on the UI.  If necessary, you can generically refer to multiple checkboxes as <i>options</i> .	Clear the <i>checkbox</i> to remove a condition.  Select the applicable <i>checkbox</i> options to customize your report.  Select the applicable <i>options</i> to customize your report.
choose (versus select)	Use <i>choose</i> when users must decide upon actions or options with different outcomes.  Use <i>select</i> to refer to a list of two or more options, such as menu options or preferences.	If you <i>choose</i> to decline the survey, you will not be contacted.  To receive special offers and promotions, <i>select</i> the applicable checkboxes.

Term	Guideline	Examples
check mark	Write as two words; do not hyphenate.	<p>Correct:</p> <ul style="list-style-type: none"> <li>• Clear all checkboxes containing a <i>check mark</i>.</li> <li>• A green <i>check mark</i> indicates that the process is approved</li> </ul> <p>Incorrect:</p> <ul style="list-style-type: none"> <li>• Enter a <i>check-mark</i> in the column.</li> <li>• A <i>checkmark</i> indicates your acceptance of the policy.</li> </ul>
clear (versus uncheck or deselect)	Use <i>clear</i> instead of <i>deselect</i> or <i>uncheck</i> to describe removing a check mark from a check box.	<p>Correct:</p> <ul style="list-style-type: none"> <li>• <i>Clear</i> all checkboxes for automatic updates.</li> </ul> <p>Incorrect:</p> <ul style="list-style-type: none"> <li>• <i>Uncheck</i> the options for automatic updates.</li> <li>• <i>Deselect</i> the check marks that do not pertain to your organization.</li> </ul>
click (versus click on)	When referring to the mouse action, use <i>click</i> , not <i>click on</i> .	<p>Correct:</p> <ul style="list-style-type: none"> <li>• <i>Click</i> the tab to access settings and preferences.</li> <li>• <i>Click</i> in the field to edit it.</li> </ul> <p>Incorrect:</p> <ul style="list-style-type: none"> <li>• <i>Click on</i> the tab to access settings and preferences.</li> <li>• <i>Click on</i> the field to edit it.</li> </ul>
comma-separated values (CSV)	Spell out at first occurrence and hyphenate.	You can export the report results to a comma-separated values (CSV) file.

Term	Guideline	Examples
composed of, comprised of, consists of	<p>To <i>compose</i> is to make up or form the substance of something (parts of a whole).</p> <p>To <i>comprise</i> is to consist of or to include (the whole comprises the parts). <i>Comprise</i> in its simplest form means to contain. <i>Is comprised of</i> is considered nonstandard and can be easily misunderstood</p> <p>For clarity and translatability, consider using <i>consists of</i>, <i>is composed of</i>, or <i>is made up of</i>.</p>	<p>Correct usage:</p> <ul style="list-style-type: none"> <li>The class <i>comprises</i> 16 boys and 12 girls.</li> <li>A total of 16 boys and 12 girls <i>compose</i> the class.</li> </ul> <p>Preferred:</p> <ul style="list-style-type: none"> <li>The guide <i>contains</i> 10 chapters.</li> <li>The installation process <i>consists of</i> several complex steps.</li> </ul>
crash	Jargon; do not use, even in release notes. Instead, use an alternative phrase.	<p>Restart the application <i>if it closes unexpectedly</i>.</p> <p>Restart the application <i>if it stops responding</i>.</p>

## D

Term	Guideline	Examples
data	Use <i>data</i> for both singular and plural cases. The singular form of <i>data</i> is now listed in most dictionaries and is considered common usage.	<p>Correct:</p> <p>The <i>data</i> appears to be incorrect.</p> <p>Incorrect:</p> <p>The <i>datum</i> appears to be incorrect.</p>
decision-making	Hyphenate in all contexts.	<p>Axiom helps with <i>decision-making</i>.</p> <p>It's important for stakeholders participate in the <i>decision-making</i> process.</p>
default	Use <i>default</i> as a noun or an adjective but avoid using it as a verb.	<p>Preferred:</p> <ul style="list-style-type: none"> <li>The <i>default</i> setting is <b>True</b>.</li> <li><b>True</b> is selected by <i>default</i>.</li> </ul> <p>Avoid:</p> <p>The options <i>default</i> to <b>True</b>.</p>

Term	Guideline	Examples
desire, desired	Do not use; use <i>preferred</i> or <i>want to</i> if necessary.	<p>Preferred:</p> <ul style="list-style-type: none"> <li>• If multiple options are available, users can select their <i>preferred</i> provider.</li> <li>• If users <i>want</i> a second opinion, they can request another appointment.</li> </ul> <p>Avoid:</p> <ul style="list-style-type: none"> <li>• If multiple options are available, users can select their <i>desired</i> provider.</li> <li>• If <i>desired</i>, users can get a second opinion.</li> </ul>
disable, disabled (versus unavailable)	<p>Use <i>unavailable</i> instead of <i>disabled</i> to describe a function or UI element that is not displayed or available to the user.</p> <p>As a general rule, use <i>disable</i> or <i>disabled</i> only for internal-facing technical audiences (engineers and UI/UX developers and designers).</p>	<p>Preferred:</p> <ul style="list-style-type: none"> <li>• If users do not have the proper security access, <b>Continue</b> is <i>unavailable</i>.</li> <li>• Clear the checkmark to make this email <i>unavailable</i>.</li> </ul> <p>Avoid:</p> <ul style="list-style-type: none"> <li>• If users do not have the proper security access, <b>Continue</b> is <i>disabled</i>.</li> <li>• Clear the checkmark to <i>disable</i> this email.</li> </ul>
displays (is displayed, appears)	<p>Use <i>appears</i> or <i>opens</i> when the sentence contains no direct object.</p> <p>Use <i>displays</i> when referencing a direct object.</p> <p>When necessary, you can also use <i>is displayed</i>, which is the grammatically correct past tense transitive form.</p>	<p>Correct:</p> <ul style="list-style-type: none"> <li>• A prompt <i>appears</i> on the page.</li> <li>• The Hospital Audit report <i>displays</i> key profit and loss statistics.</li> <li>• If data is entered incorrectly, a warning message <i>is displayed</i>.</li> </ul> <p>Incorrect:</p> <ul style="list-style-type: none"> <li>• The Hospital Audit report displays.</li> <li>• If data is entered incorrectly, a warning message <i>displays</i>.</li> </ul> <p>See <a href="#">Transitive and intransitive verbs</a>.</p>

Term	Guideline	Examples
downtime	<i>Downtime</i> refers to systems that are offline. Write as one word and do not hyphenate.	Correct: The unscheduled <i>downtime</i> was caused by system failures.  Incorrect: <ul style="list-style-type: none"> <li>The unscheduled <i>down-time</i> was caused by system failures.</li> <li>The unscheduled <i>down time</i> was caused by system failures.</li> </ul>
driver license	The correct term is <i>driver license</i> , not <i>driver's license</i> or <i>drivers' license</i> .	Correct: Users must scan their <i>driver license</i> or other photo ID.  Incorrect: Users must scan their <i>driver's license</i> or other photo ID.

## E

Term	Guideline	Examples
e.g.	<i>e.g.</i> is a Latin term and is often used incorrectly, as is <i>i.e.</i> Do not use; instead, use <i>for example</i> .	To earn rewards, members can participate in challenges ( <i>for example</i> , a group cycling event, city walk, or a 5K race).
email	Write <i>email</i> as one word and do not hyphenate. Avoid using <i>email</i> as a verb and instead, use the phrase <i>send an email</i> .	Preferred: <ul style="list-style-type: none"> <li>Refer to the recent <i>email</i> message regarding health benefits.</li> <li>For questions about benefits, <i>send an email</i> to Human Resources.</li> </ul> Avoid: <ul style="list-style-type: none"> <li>Human Resources recently <i>emailed</i> information regarding health benefits.</li> <li>For questions about benefits, <i>email</i> Human Resources.</li> </ul> See <a href="#">e-words</a> , <a href="#">Hyphens and hyphenation</a> .
end-user	Do not use in customer-facing documentation; refer to <i>the user</i> or <i>users</i> .	The audience for this guide is Syntellis Axiom Healthcare <i>users</i> .

Term	Guideline	Examples
enter (versus type)	<p>Use <i>enter</i> as the generic term when users interact with the software.</p> <p>Do not use <i>type</i> in this context because some software runs on devices in which users do not type to interact with the device.</p>	<p><i>Enter</i> the customer's contact information.</p>
ensure, (assure, insure)	<p><i>Ensure</i> guarantees an event or condition.</p> <p>To <i>assure</i> is to remove doubt or anxiety.</p> <p><i>Insure</i> is reserved for financial liability, as in <i>insuring</i> a car.</p>	<p>To <i>ensure</i> successful results, read the instructions.</p> <p>My manager <i>assures</i> me that my bonus is forthcoming.</p> <p>The home is <i>insured</i>.</p>
ensure (versus verify)	<p>Use <i>ensure</i> when you mean to make sure of or guarantee a future event.</p> <p>Use <i>verify</i> to confirm or substantiate specific results.</p>	<p>Complete all fields to <i>ensure</i> successful search results.</p> <p><i>Verify</i> that the system setting is <b>False</b>.</p> <p><i>Verify</i> that the data is accurate.</p>
etc.	<p><i>Et cetera</i> (<i>etc.</i>) is a Latin term. Do not use; instead, use <i>and so on</i> when necessary.</p>	<p>To earn rewards, members can participate in challenges, missions, and <i>so on</i>.</p> <p>See <a href="#">Latin abbreviations and phrases</a>.</p>
execute	<p>Do not use unless the term appears as a label on a UI control. Instead, use <i>run</i>.</p> <p>Always use <i>run</i> in the context of operating systems, macros, and queries.</p>	<p>Correct:</p> <ul style="list-style-type: none"> <li>• <i>Run</i> the test script.</li> <li>• To <i>run</i> the program, click <i>Execute</i>. (<i>Execute</i> appears on the UI)</li> </ul> <p>Incorrect:</p> <ul style="list-style-type: none"> <li>• Verify that the program <i>executes</i> successfully.</li> <li>• Go to <b>Publish &gt; Publish to File</b>, and then <i>execute</i>.</li> </ul>

## F

Term	Guideline	Examples
falls (versus occurs)	<p>Do not use <i>falls</i> when referring to dates and time frames. Instead, use <i>occurs</i>.</p> <p>Falls is acceptable in speech, but <i>occurs</i> is more precise for technical documentation.</p>	<p>Preferred:</p> <p>The renewal date <i>occurs</i> sometime in Q3 2021.</p> <p>Avoid:</p> <p>The renewal date <i>falls</i> sometime in Q3 2021.</p>
file name	<p>Write as two words when using as an adjective or a noun and when referring to the name of a file. Do not hyphenate.</p>	<p>Correct:</p> <ul style="list-style-type: none"> <li>• The <i>file name</i> should be clear and intuitive.</li> <li>• To search for the document, enter the <i>file name</i>.</li> </ul> <p>Incorrect:</p> <ul style="list-style-type: none"> <li>• The <i>filename</i> should be clear and intuitive.</li> <li>• To search for the document, enter the <i>filename</i>.</li> </ul>
following (preceding)	<p>Use <i>preceding</i> and <i>following</i> when referring to the relative location of content in the same topic or deliverable.</p> <p>Avoid using <i>above</i> and <i>below</i>. In PDFs, text or images might not occur together on the same page.</p>	<p>Preferred:</p> <ul style="list-style-type: none"> <li>• The <i>following</i> table explains the registration process.</li> <li>• The <i>previous</i> information does not apply to part-time employees</li> </ul> <p>Avoid:</p> <ul style="list-style-type: none"> <li>• The table <i>below</i> explains the registration process.</li> <li>• The <i>above</i> information does not apply to part-time employees.</li> </ul>



## G

Term	Guideline	Examples
go to (versus navigate)	Use <i>go to</i> instead of <i>navigate</i> when directing users to a specific location or menu.	Preferred: Go to the home page and enter your credentials.  Avoid: Navigate to the home page and enter your credentials.
gray (versus grey)	Use <i>gray</i> instead of <i>grey</i> . Both spellings are correct, but <i>gray</i> is the preferred spelling in the United States.  Use as an adjective only, never as a verb.	Preferred: Unavailable options appear in <i>gray</i> text.  Avoid: Unavailable options are <i>grayed out</i> .

## H

Term	Guideline	Examples
healthcare	Write as one word.	Axiom Healthcare Suite offers strategy-based performance software that makes it easy to model the future and analyze results.
hover	Use <i>hover</i> to describe moving the mouse pointer over an area of the UI without selecting it.	<i>Hover</i> over the icon to view its description.  See <a href="#">UI controls and actions</a> .

## I

Term	Guideline	Examples
if (versus whether, when)	Use <i>if</i> to express a condition. Use <i>whether</i> to express uncertainty. Use <i>when</i> for situations that require preparation or to denote the passage of time.	<i>If</i> you don't know whether a network key is needed, contact your network administrator.  Users were unclear about <i>whether</i> to upgrade their software.  <i>When</i> Setup is complete, restart your computer.

Term	Guideline	Examples
in (versus on)	<p>Use <i>in</i> when referring to panes, panels, fields, and areas.</p> <p>Use <i>on</i> when referring to pages, toolbars, tabs, menus, and windows.</p>	<p>In:</p> <ul style="list-style-type: none"> <li>• Enter the prescription <i>in</i> the Rx field.</li> <li>• Set preferences <i>in</i> the left pane.</li> </ul> <p>On:</p> <ul style="list-style-type: none"> <li>• See the article <i>on</i> page 3 for more information.</li> <li>• Click the icon <i>on</i> the toolbar.</li> <li>• Complete the information <i>on</i> the <b>User Preferences</b> tab.</li> <li>• Click <b>Continue</b> <i>on</i> the Services window.</li> </ul> <p>See <a href="#">UI controls and actions</a>.</p>
institution (versus organization)	<p>Use <i>institution</i> only when referring to higher education institutions. In all other contexts, use <i>organization</i>.</p>	<p>Axiom streamlines the budgeting process and increases efficiencies across higher education <i>institutions</i>.</p> <p>Axiom streamlines the budgeting process and integrates financial plans using methods designed for healthcare <i>organizations</i>.</p>
insure (assure, ensure)	<p><i>Insure</i> is reserved for financial liability, as in insuring a car.</p> <p>To <i>assure</i> is to remove doubt or anxiety.</p> <p><i>Ensure</i> guarantees an event or condition.</p>	<p>The home is <i>insured</i>.</p> <p>My manager <i>assured</i> me that I will receive a bonus.</p> <p>To <i>ensure</i> a successful result, read the documentation.</p>
internet	<p>Lowercase; do not capitalize.</p>	<p>You must have <i>internet</i> access to update the software.</p>
it's (versus its)	<p><i>It's</i> is a contraction for <i>it is</i>. If you can substitute <i>it is</i> in the sentence and retain the correct meaning, use the contraction.</p> <p><i>Its</i> (no apostrophe) expresses possession.</p>	<p><i>It's</i> a beautiful day in the neighborhood.</p> <p>The company celebrated <i>its</i> fifth anniversary.</p>

## J

Term	Guideline	Examples

## K

Term	Guideline	Examples
knowledge base	Write as two words; not hyphenated.	The scores are generated using a <i>knowledge base</i> that is created using a survey.

## L

Term	Guideline	Examples
launch	Do not use <i>launch</i> to mean opening an application or form. Instead, use <i>open</i> .	Preferred: Click <b>Create an account</b> to <i>open</i> the Registration window.  Avoid: <i>Launch</i> the application from a secured browser.
log in login log out (versus sign in and sign out)	Use <i>log in</i> rather than <i>log on</i> and <i>log out</i> rather than <i>log off</i> .  <i>Log in</i> is a standard verb phrase for initiating interaction with a site or app. <i>Login</i> is a noun or noun adjunct. <i>Log out</i> is a standard verb phrase for leaving or signing out of a site or app.  Do not use the terms <i>sign in</i> and <i>sign out</i> unless they explicitly appear in the UI.	Correct: <ul style="list-style-type: none"> <li>• Enter your email address and password to <i>log in</i>.</li> <li>• Enter your <i>login</i> information to begin.</li> <li>• Save your information before <i>logging out</i>.</li> </ul> Incorrect: <ul style="list-style-type: none"> <li>• Type in your email address and password to <i>sign in</i>.</li> <li>• Click <b>Exit</b> to <i>sign out</i> of the application.</li> </ul>

## M

Term	Guideline	Examples
may (versus might)	Use <i>may</i> to express permission. Use <i>might</i> or <i>can</i> to express condition.	Preferred: <ul style="list-style-type: none"> <li>If errors occur, users <i>might</i> need to restart the application.</li> <li>Users <i>can</i> register after they complete the survey.</li> <li>Users <i>may</i> cancel their subscription after the trial period.</li> </ul> Avoid: If errors occur, users <i>may</i> need to restart the application.
Microcosting	Write as one word.	<i>Microcosting</i> results are presented as standalone studies or used as inputs directly into cost-benefit or cost-effectiveness analyses.
must (versus need to)	Use <i>must</i> when discussing a requirement or use a more specific word like <i>required</i> or <i>mandatory</i> . Avoid <i>should</i> and <i>need to</i> whenever possible.	Preferred: Users <i>must</i> complete the survey to receive free software. Avoid: Users <i>need to</i> complete the survey to receive free software. Users <i>should</i> complete the survey to receive free software.

## N

Term	Guideline	Examples
navigate (versus go to)	Use <i>go to</i> instead of <i>navigate</i> when directing users to a specific location or menu.	Preferred: <i>Go to</i> the home page and enter your credentials. Avoid: <i>Navigate</i> to the home page and enter your credentials.

Term	Guideline	Examples
next to (versus beside)	<p>Although <i>beside</i> and <i>next to</i> are both prepositions, their meanings differ slightly.</p> <p><i>Next to</i> refers to location and means <i>immediately following</i>, whereas <i>beside</i> refers to relative proximity and can also mean <i>as well as</i> or <i>as compared with</i>.</p> <p>Use <i>next to</i> when indicating the location of UI controls or options.</p>	<p>Preferred:</p> <ul style="list-style-type: none"> <li>• Select the checkbox <i>next to</i> the option.</li> <li>• Click the arrow <i>next to</i> the field and select a medication from the list.</li> </ul> <p>Avoid:</p> <ul style="list-style-type: none"> <li>• Select the check box <i>beside</i> the option.</li> <li>• Click the arrow <i>beside</i> the field and select a medication from the list.</li> </ul>

## O

Term	Guideline	Examples
occurs (versus falls)	<p>Use <i>occurs</i> instead of <i>falls</i> when referring to dates and time frames.</p> <p><i>Falls</i> is acceptable in speech, but <i>occurs</i> is more precise for technical documentation.</p>	<p>Preferred:</p> <p>The renewal date <i>occurs</i> sometime in Q3 2021.</p> <p>Avoid:</p> <p>The renewal date <i>falls</i> sometime in Q3 2021.</p>
on (versus about)	<p>Use <i>about</i> instead of <i>on</i> when referring to additional information.</p> <p>Use <i>on</i> when referring to pages, screens, tiles, toolbars, tabs, menus, and windows on the UI.</p>	<p>On:</p> <ul style="list-style-type: none"> <li>• See the article <i>on</i> page 3 for more information.</li> <li>• Click the icon <i>on</i> the toolbar.</li> <li>• Complete the information <i>on</i> the <b>User Preferences</b> tab.</li> <li>• Click <b>Continue</b> <i>on</i> the Services window.</li> </ul> <p>In:</p> <ul style="list-style-type: none"> <li>• Enter the prescription <i>in</i> the Rx field.</li> <li>• Set preferences <i>in</i> the left pane.</li> </ul>

Term	Guideline	Examples
on (versus in)	<p>Use <i>on</i> when referring to pages, toolbars, tabs, menus, and windows.</p> <p>Use <i>in</i> when referring to panes, panels, fields, and areas.</p>	<p>On:</p> <ul style="list-style-type: none"> <li>• See the article <i>on</i> page 3 for more information.</li> <li>• Click the icon <i>on</i> the toolbar.</li> <li>• Complete the information <i>on</i> the <b>User Preferences</b> tab.</li> <li>• Click <i>Continue</i> <i>on</i> the Services window.</li> </ul> <p>In:</p> <ul style="list-style-type: none"> <li>• Enter the prescription <i>in</i> the <b>Rx</b> field.</li> <li>• Set preferences <i>in</i> the left pane.</li> </ul> <p>See <a href="#">UI controls and actions</a>.</p>
once (versus after)	<p>Use <i>once</i> only when indicating <i>one time</i>.</p> <p>Do not use <i>once</i> instead of <i>when</i> or <i>after</i>.</p>	<p>Preferred:</p> <ul style="list-style-type: none"> <li>• You can rename the files <i>after</i> the installation is complete.</li> <li>• <i>When</i> you receive an email notification, please respond promptly.</li> <li>• You are not required to log in more than <i>once</i>.</li> </ul> <p>Avoid:</p> <ul style="list-style-type: none"> <li>• <i>Once</i> the installation is complete, you can rename the files.</li> <li>• <i>Once</i> you receive an email notification, please respond promptly.</li> </ul>
online	Write as one word and do not hyphenate.	Users can access their information <i>online</i> by clicking <b>My Account</b> .

Term	Guideline	Examples
opens (appears, displays)	<p>Use <i>opens</i>, <i>appears</i>, or <i>is displayed</i> when the sentence does not contain an object.</p> <p>Use <i>displays</i> when referencing a direct object.</p>	<p>Preferred:</p> <ul style="list-style-type: none"> <li>• The Shopping Cart <i>opens</i>.</li> <li>• A message <i>appears</i> on the page.</li> <li>• The report <i>displays</i> the most current income statement and balance sheet.</li> <li>• When an error occurs, an message <i>is displayed</i>.</li> </ul> <p>Avoid:</p> <ul style="list-style-type: none"> <li>• A message <i>displays</i> on the page.</li> <li>• The most current income statement <i>displays</i>.</li> </ul> <p>See <a href="#">Transitive and intransitive verbs</a>.</p>
organization (versus institution)	<p>Use <i>organization</i>, not <i>institution</i>, when referring to healthcare.</p> <p><i>Institution</i> is acceptable when referring specifically to higher education institutions.</p>	<p>Axiom streamlines the budgeting process and integrates financial plans using methods designed for healthcare <i>organizations</i>.</p> <p>Axiom streamlines the budgeting process and increases efficiencies across higher education <i>institutions</i>.</p>

## P

Term	Guideline	Examples
page (versus screen, window)	<p>Use <i>page</i> or <i>web page</i> to describe one of a collection of web documents that make up a website.</p> <p><i>Page</i> refers to the location of the reader or to a specific page, such as the <i>home page</i> or <i>start page</i>.</p> <p>In installation or configuration documentation, <i>window</i> is often the correct term.</p>	<p>Preferred:</p> <ul style="list-style-type: none"> <li>• Click <b>Create Account</b> to open the Registration <i>page</i>.</li> <li>• Close the WinZip Self-Extractor <i>window</i>.</li> </ul> <p>Avoid:</p> <ul style="list-style-type: none"> <li>• Click <b>Create Account</b> to open the Registration <i>screen</i>.</li> <li>• Click <b>Create Account</b> to open the Registration <i>window</i>.</li> </ul>

Term	Guideline	Examples
particular (versus specific)	<p>When referring to a single entity, use <i>specific</i>.</p> <p><i>Particular</i> has multiple contexts and <i>specific</i> is typically used in technical documentation.</p>	<p>Preferred:</p> <ul style="list-style-type: none"> <li>To select a <i>specific</i> provider, click the name in the search results.</li> <li>Certain errors require <i>specific</i> actions.</li> </ul> <p>Avoid:</p> <ul style="list-style-type: none"> <li>To select a <i>particular</i> provider, click the name in the search results.</li> </ul>
payer (versus payor)	<p>According to Marketing's Syntellis Master Style Guidelines document, use <i>payer</i>.</p> <p>The terms <i>payer</i> and <i>payor</i> are generally synonymous in the healthcare industry, although <i>payor</i> is preferred by the American Medical Association (AMA).</p>	<p>Date ranges for <i>payers</i> may not overlap.</p>
percent, percentage	<p>Use <i>percent</i> when using a specific number and <i>percentage</i> when making a general reference without a number.</p>	<p>The department achieved 95 <i>percent</i> participation in the survey.</p> <p>The department achieved a high <i>percentage</i> of participation in the survey.</p>
PM (AM)	<p>Write as shown, in uppercase and without punctuation.</p>	<p>9 AM; 12:30 PM</p> <p>See <a href="#">Dates, days, and times</a>.</p>
preceding (following)	<p>Use <i>preceding</i> and <i>following</i> when referring to the relative location of content in the same topic or deliverable.</p> <p>Avoid using <i>above</i> and <i>below</i>. In PDFs, text or images might not occur together on the same page.</p>	<p>Preferred:</p> <ul style="list-style-type: none"> <li>The <i>following</i> table explains the registration process.</li> <li>The <i>previous</i> information does not apply to part-time employees</li> </ul> <p>Avoid:</p> <ul style="list-style-type: none"> <li>The table <i>below</i> explains the registration process.</li> <li>The <i>above</i> information does not apply to part-time employees.</li> </ul>



Term	Guideline	Examples
preinstallation	Write as one word; do not hyphenate.	Correct: You must complete the <i>preinstallation</i> survey before proceeding.  Incorrect: You must complete the <i>pre-installation</i> survey before proceeding.
prompt	<i>Prompt</i> is an acceptable verb; however, avoid using it as both a verb and a noun in the same document.	A message <i>prompts</i> users to correct the errors.  Users receive a <i>prompt</i> to correct the errors.

## Q

Term	Guideline	Examples

## R

Term	Guideline	Examples
recommends we recommend it is recommended	If Syntellis specifically recommends a user action, write " <i>Syntellis recommends</i> ". Avoid using <i>we recommend</i> in technical documentation without attributing a source.  If you're unsure or if potential legal ramifications exist, refer to the recommendation as a <i>best practice</i> (for example, " <i>As a best practice, uninstall the previous version of the software before installing the latest version</i> ").  Avoid using <i>it is recommended</i> without attributing a source.	Preferred: <ul style="list-style-type: none"> <li>• Syntellis recommends that you install all software patches and upgrades.</li> <li>• As a best practice, install all software patches and upgrades.</li> </ul> Avoid: <ul style="list-style-type: none"> <li>• <i>We recommend</i> that you install all software patches and upgrades.</li> <li>• <i>It is recommended</i> that you install all software patches and upgrades.</li> </ul>
reforecast	Write as one word; do not hyphenate.	Organizations often <i>reforecast</i> financial projections when a large or unexpected event occurs, such as the COVID-19 pandemic.

Term	Guideline	Examples
ribbon	Use <i>ribbon</i> , not <i>ribbon bar</i> or <i>ribbon menu</i> when referring to the UI element	On the <i>ribbon</i> , click...
right-click	Write as one word and hyphenate. In steps with multiple actions, use <i>click</i> with <i>right-click</i> .	<i>Right-click</i> the menu, and then <i>click</i> <b>Print &gt; Options</b> .
runtime	As an adjective, <i>runtime</i> describes a thing that's occurring or relevant at runtime.	The average <i>runtime</i> is 2-4 hours. You can distribute <i>runtime</i> copies to an unlimited number of users.

## S

Term	Guideline	Examples
screen (versus page)	Use <i>page</i> or <i>web page</i> to describe one of a collection of web documents that make up a website.  <i>Page</i> refers to the location of the reader or to a specific page, such as the <i>home page</i> or <i>start page</i> .  In installation or configuration documentation, <i>window</i> is often the correct term.	Preferred: <ul style="list-style-type: none"> <li>Click <b>Create Account</b> to open the Registration <i>page</i>.</li> <li>Close the WinZip Self-Extractor <i>window</i>.</li> </ul> Avoid: <ul style="list-style-type: none"> <li>Click <b>Create Account</b> to open the Registration <i>screen</i>.</li> <li>Click <b>Create Account</b> to open the Registration <i>window</i>.</li> </ul>
screenshot	Do not use in customer-facing content; instead, use <i>image</i> , <i>page</i> , or <i>graphic</i> as applicable.	This <i>page</i> contains main statistics by payer that calculate gross and net metrics within the block.  The following <i>graphic</i> illustrates a typical budget workflow.  The <i>image</i> on the left demonstrates the correct calculation.
scroll	To <i>scroll</i> is the action of using a side control to move the page up, down, or across to view different areas.	<i>Scroll</i> down to view additional information for hospital facilities.

Term	Guideline	Examples
see (versus view)	<p>See means to perceive or detect with the eyes and is used when referring to additional information.</p> <p>When used as a verb, <i>view</i> means to look at something. In most contexts, users <i>view</i> information on a window, tab, or report.</p> <p>You can also use <i>view</i> as a noun (as in changing the <i>view</i>). However, do not use <i>view</i> as both a verb and a noun in the same paragraph.</p>	<p>Preferred:</p> <ul style="list-style-type: none"> <li>Click the help icon to <i>view</i> details about the field.</li> <li>See your system administrator for possible solutions for this issue.</li> <li>For more information, see...</li> </ul> <p>Avoid:</p> <ul style="list-style-type: none"> <li>Click the help icon to see additional information.</li> <li>You can see site analytics by clicking the gear.</li> </ul>
select (versus choose)	<p>Use <i>select</i> to refer to a list of two or more options, such as menu options or preferences.</p> <p>Use <i>choose</i> when users must decide upon actions or options with different outcomes.</p>	<p>To receive special offers and promotions, <i>select</i> the applicable checkboxes.</p> <p>If you <i>choose</i> to decline the survey, you will not be contacted.</p>
select (versus click)	<p>Use <i>select</i> for the following user UI elements:</p> <ul style="list-style-type: none"> <li>Checkboxes and radio buttons (options)</li> <li>Items from a menu or list</li> </ul> <p>Use <i>click</i> for:</p> <ul style="list-style-type: none"> <li>Arrows</li> <li>Command controls (labeled buttons)</li> <li>Icons</li> <li>Hyperlinks</li> <li>Tabs</li> <li>Tooltips</li> </ul>	<p>Select:</p> <ul style="list-style-type: none"> <li><i>Select</i> all conditions that apply.</li> <li><i>Select</i> either Medicare or Medicaid as the plan type.</li> </ul> <p>Click:</p> <ul style="list-style-type: none"> <li><i>Click Settings &gt; More</i> to view additional options.</li> <li><i>Click Save and Exit</i>.</li> <li><i>Click ?</i> to access online help.</li> <li><i>Click</i> the link to access a free download for Microsoft NET. Framework Version 4.7.</li> <li>On the <b>Formulas</b> tab, <i>click Reports</i>.</li> <li><i>Click</i> the icon to view the tooltip for this field.</li> </ul> <p>See <a href="#">Mouse actions</a> and <a href="#">UI controls and actions</a>.</p>
set up setup	<p>Use <i>set up</i> as a verb phrase. Use <i>setup</i> as a noun or an adjective.</p>	<p><i>Set up</i> your user profile.</p> <p>Complete the module <i>setup</i>.</p> <p>Follow the <i>setup</i> instructions.</p>

Term	Guideline	Examples
should	Avoid using <i>should</i> . If an action is required or expected, use <i>must</i> or a present-tense or future-tense verb.	<p>Preferred:</p> <ul style="list-style-type: none"> <li>• Users <i>must</i> verify their phone number to continue.</li> <li>• After users complete the survey, they <i>receive</i> &lt;will receive&gt; immediate confirmation.</li> </ul> <p>Avoid:</p> <ul style="list-style-type: none"> <li>• Users <i>should</i> verify their phone number to continue.</li> <li>• After users complete the survey, they <i>should</i> receive immediate confirmation.</li> </ul>
sign in sign out (versus log in, login, and log out)	<p>Do not use the terms <i>sign in</i> and <i>sign out</i> unless they explicitly appear in the UI.</p> <p>Use <i>log in</i> rather than <i>log on</i> and <i>log out</i> rather than <i>log off</i>.</p> <p><i>Log in</i> is a standard verb phrase for initiating interaction with a site or app. <i>Login</i> is a noun or noun adjunct. <i>Log out</i> is a standard verb phrase for leaving or signing out of a site or app.</p>	<p>Correct:</p> <ul style="list-style-type: none"> <li>• Enter your email address and password to <i>log in</i>.</li> <li>• Enter your <i>login</i> information to begin.</li> <li>• Save your information before <i>logging out</i>.</li> </ul> <p>Incorrect:</p> <ul style="list-style-type: none"> <li>• Type in your email address and password to <i>sign in</i>.</li> <li>• Click <b>Exit</b> to <i>sign out</i> of the application.</li> </ul>
since (versus because)	<p>Use <i>since</i> only when indicating the passage of time.</p> <p>Use <i>because</i> for phrases that include an explanation. Do not use <i>since</i> in place of <i>because</i>.</p>	<p>Correct:</p> <ul style="list-style-type: none"> <li>• <i>Since</i> the last update, several guidelines changed.</li> <li>• <i>Because</i> the installation replaces the existing version, you must reset your preferences.</li> </ul> <p>Incorrect:</p> <p><i>Since</i> the installation replaces the existing version, you must reset your preferences.</p>

Term	Guideline	Examples
Social Security number SSN	<p><i>Social Security</i> is capitalized because it is the name of the United States government agency that issues the identification numbers.</p> <p><i>Number</i> (as in <i>Social Security number</i>) is not capitalized because it is not a proper noun.</p> <p>Refer to this number as <i>SSN</i> after defining the term on the first occurrence.</p>	<p>Correct:</p> <ul style="list-style-type: none"> <li>Enter the patient's medical record number (MRN) or <i>Social Security number</i>.</li> <li>Enter the patient's MRN or SSN.</li> </ul> <p>Incorrect: Enter the patient's <i>Social Security Number</i>.</p>
sublocation	Write as one word; do not hyphenate.	You must create unique names for locations and <i>sublocations</i> .
stand-alone	When used as an adjective, use hyphenation.	Access the software from a <i>stand-alone</i> workstation.
Syntellis Performance Solutions	<p>In marketing materials, refer to <i>Syntellis™ Performance Solutions</i> and use a trademark symbol at the first occurrence.</p> <p>For subsequent references, refer to <i>Syntellis</i>.</p> <p>In technical documentation and online help, the copyright page includes all relevant copyright and trademark declarations.</p>	<p><i>Syntellis™ Performance Solutions</i></p> <p><i>Syntellis™</i></p> <p>Syntellis</p>

## T

Term	Guideline	Examples
telnet	<p>A telecommunications protocol that provides specifications for emulating a remote computer terminal so that one can access a distant computer and function online using an interface that appears to be part of the user's local system.</p> <p>Use as a noun or an adjective; do not use as a verb (<i>telnet</i> is an intransitive verb).</p>	<p>You do not need to run a <i>telnet</i> or FTP server daemon to connect to somebody else's <i>telnet</i> or FTP server.</p> <p>To change the configuration options, log into the appliance server using the <i>telnet</i> or SSH remote login service.</p> <p>Users can add new changes to the system, although these changes require some <i>telnet</i> operations.</p>
tooltip	Microsoft spells this word as one word and without capitalization.	Click the icon to view the <i>tooltip</i> for this field.

Term	Guideline	Examples
type (versus enter)	<p>Use <i>enter</i> as the generic term when users interact with the software.</p> <p>Do not use <i>type</i> in this context because some software runs on devices in which users do not type to interact with the device.</p>	<i>Enter</i> the customer's contact information.

## U

Term	Guideline	Examples
unavailable (versus disable, disabled)	<p>Use <i>unavailable</i> instead of <i>disabled</i> to describe a function or UI element that is not displayed or available to the user.</p> <p>As a general rule, use <i>disable</i> or <i>disabled</i> only for internal-facing technical audiences (engineers and UI/UX developers and designers).</p>	<p>Preferred:</p> <ul style="list-style-type: none"> <li>If users do not have the proper security access, <b>Continue</b> is <i>unavailable</i>.</li> <li>Clear the checkmark to make this email <i>unavailable</i>.</li> </ul> <p>Avoid:</p> <ul style="list-style-type: none"> <li>If users do not have the proper security access, <b>Continue</b> is <i>disabled</i>.</li> <li>Clear the checkmark to <i>disable</i> this email.</li> <li>The option is <i>disabled</i> for unauthenticated users.</li> </ul>
username	Microsoft spells this word as one word.	Enter the username and password.
utilize (versus use)	<p><i>Use</i> means to consume from a limited supply or take something to achieve a result. <i>Use</i> is considered a noun or a verb, while <i>utilize</i> is only a verb.</p> <p><i>Utilize</i> means to use something beyond its intended purpose. <i>Use</i> can be considered a noun or a verb, while <i>utilize</i> is only a verb.</p>	<p>Preferred:</p> <ul style="list-style-type: none"> <li>The system <i>uses</i> diverse technologies to help companies avoid cyber-security attacks.</li> <li>Refer to the documentation for tips on how to <i>use</i> the software.</li> <li><i>Use</i> of the word <i>utilize</i> is often incorrect.</li> </ul> <p>Avoid:</p> <ul style="list-style-type: none"> <li>The system <i>utilizes</i> diverse technologies to help companies avoid cyber-security attacks.</li> <li>Refer to the documentation for tips on <i>utilizing</i> the software.</li> </ul>

## V

Term	Guideline	Examples
verify (versus ensure)	<p>Use <i>verify</i> to confirm or substantiate specific results.</p> <p>Use <i>ensure</i> to <i>make sure of</i> or <i>guarantee</i> a future event.</p>	<p><i>Verify</i> that the system setting is <b>False</b>.</p> <p><i>Verify</i> that the data is accurate.</p> <p>Complete all procedures to <i>ensure</i> successful search results</p>
via	<p><i>Via</i> is a Latin term (unless the context is geographical). Do not use; instead, use alternative phrases such <i>through</i>, <i>by</i>, <i>using</i>, or <i>by means of</i>.</p>	<p>Preferred:</p> <ul style="list-style-type: none"> <li>• Users can contact Customer Support <i>by</i> phone or email.</li> <li>• Users are notified <i>by</i> email.</li> <li>• Customer Support staff can research issues <i>by using</i> the Knowledge Base.</li> </ul> <p>Avoid:</p> <ul style="list-style-type: none"> <li>• Users can contact Customer Support <i>via</i> phone or email.</li> <li>• Customers are notified <i>via</i> email.</li> <li>• Customer Support staff can research issues <i>via</i> the Knowledge Base.</li> </ul>
view (versus see)	<p>When used as a verb, <i>view</i> means to look at something. In most contexts, users <i>view</i> information on a window, tab, or report.</p> <p>You can also use <i>view</i> as a noun (as in changing the <i>view</i>). However, do not use <i>view</i> as both a verb and a noun in the same paragraph.</p> <p><i>See</i> means to perceive or detect with the eyes and is used when referring to additional information.</p>	<p>Preferred:</p> <ul style="list-style-type: none"> <li>• Click the help icon to <i>view</i> details about the field.</li> <li>• <i>See</i> your system administrator for possible solutions for this issue.</li> <li>• For more information, <i>see</i>...</li> </ul> <p>Avoid:</p> <ul style="list-style-type: none"> <li>• Click the help icon to <i>see</i> additional information.</li> <li>• You can <i>see</i> site analytics by clicking the gear.</li> </ul>

## W

Term	Guideline	Examples
<p>want (versus wish, desire)</p>	<p>In most cases, avoid words with emotional context such as <i>desire</i>, <i>wish</i>, or <i>want</i> by rewriting the sentence or placing the verb early in the sentence.</p> <p>However, in certain situations, you can use <i>want</i> to express a preference.</p>	<p>Preferred:</p> <ul style="list-style-type: none"> <li>• Select the <i>applicable</i> server from the list.</li> <li>• To make the change throughout the application, click <b>Activate</b>.</li> <li>• Skip the Preferences section to opt-out of product updates.</li> <li>• Click OK to confirm your intention to upgrade.</li> </ul> <p>Avoid:</p> <ul style="list-style-type: none"> <li>• Select the <i>desired</i> server from the list.</li> <li>• <i>If you want</i> to make this change throughout the application, click <b>Activate</b>.</li> <li>• Skip the Preferences section <i>if you do not want</i> to receive product updates.</li> <li>• Click <b>OK</b> to confirm <i>that you want</i> to upgrade.</li> </ul>
<p>Web website web-based</p>	<p>Write in lowercase.</p> <p>For <i>website</i>, write as one word.</p> <p>For <i>web-based</i>, hyphenate as shown.</p>	<p>Users can view additional information on the <i>website</i>.</p>
<p>while (versus although)</p>	<p>Use <i>while</i> to mean <i>during</i>. Do not use <i>while</i> as a substitute for <i>although</i>.</p>	<p>Preferred:</p> <ul style="list-style-type: none"> <li>• You may continue working <i>while</i> you wait for the build to complete.</li> <li>• You can continue working <i>during</i> the build process.</li> <li>• <i>Although</i> you can choose Option A, Option B is preferable.</li> </ul> <p>Avoid</p> <p><i>While</i> you can choose Option A, Option B is preferable.</p>



Term	Guideline	Examples
<p>window, Windows</p>	<p>Use <i>window</i> when referring specifically to Windows applications.</p> <p>In customer-facing documentation, use <i>page</i>. Do not <i>window</i>, <i>screen</i>, <i>dialog box</i>, or <i>pop-up window</i>.</p> <p>When referring to Windows (the operating system), include the version number and write as Microsoft Windows® Version X and capitalize proper nouns.</p>	<p>Correct:</p> <ul style="list-style-type: none"> <li>Click Next to access the Preferences <i>page</i>.</li> <li>To run the Installation program, verify that you have installed Microsoft Windows® Version 10 or higher.</li> </ul> <p>Incorrect:</p> <ul style="list-style-type: none"> <li>Click Next to access the Preferences <i>window</i>.</li> <li>To run the installation program, verify that you installed <i>Windows 10</i> or higher.</li> </ul>
workload	Write as one word.	If you have concerns about your <i>workload</i> , discuss them with your manager.
workplace	Write as one word.	Avoid using inappropriate language in the <i>workplace</i> .
workspace	Write as one word.	Keep your <i>workspace</i> clean and well-organized.

## X

Term	Guideline	Examples
x-ray	Hyphenate and do not capitalize except in instances where initial caps are required.	To submit claims for <i>x-rays</i> and other imaging services, upload the medical bill and click <b>Submit</b> .

## Y

Term	Guideline	Examples

## Z

Term	Guideline	Examples
ZIP Code	Capitalize as shown. <i>ZIP</i> is an acronym for <i>Zone Improvement Plan</i> .	Enter the customer's ZIP Code.