

Knowledge Base Style Guide

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Content adapted from the Northwestern University Information Technology NUIT Communications' "Northwestern University IT Service Manager Knowledge Base Style Guide."

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Other great resources for writing fantastic knowledge base articles

<https://www.helpscout.net/blog/knowledge-base-article/>

<http://blog.freshdesk.com/writing-a-knowledge-base-article/>

<http://www.lynda.com/Business-Skills-tutorials/Reviewing-essential-technical-writing-skills/168241/368804-4.html>

TWU Office of Technology Knowledge Base (KB) articles should provide end users with clear, consistent, and accessible instructions for common technology questions. Following this guide will provide the most useful information to the University community, its guests, or other interested parties.

Submitted articles will be approved both for accuracy of content and for formatting guidelines outlined in this style guide.

1. WRITING A PUBLIC KNOWLEDGE BASE ARTICLE

Writing content specifically for the web requires special rules and guidelines to ensure information is understandable, concise, and consistent. Web-oriented writing and editing are essential to sharing information quickly and in an easy-to-digest format.

1.1 SUBJECT (TITLE)

The subject (title) should not address if the answer applies to a specific operating system, platform, or device (e.g. Windows 7, Mac, Android, etc.); rather, the article should address the solution across different platforms, versions, and devices.

LESS EFFECTIVE: Set up VPN.

EFFECTIVE: Set up VPN in Windows 7

Do not repeat the subject in the Description field or it will appear as duplicate information in the KB dashboard.

LESS EFFECTIVE: How do I download and install Microsoft Lync for Windows

EFFECTIVE: Download and Install Microsoft Lync for Windows

1.2 BODY (DESCRIPTION)

Step-by-step instructions should completely and concisely address the title question following the writing guidelines outlined below. Again, do not repeat the title in the Description field.

1.2.1 ASSUMING USER KNOWLEDGE

For the community, assume basic technical knowledge (how to open a program, locate a menu item, etc.). Instructions should be written such that faculty, staff, students, researchers at all levels of technical expertise can follow with minimal assistance.

1.2.2 GENERAL WRITING STYLE GUIDELINES

Write in **complete sentences**, including a subject, verb, and object.

LESS EFFECTIVE: Portal ID in Username field.

EFFECTIVE: Enter Portal ID in the Username field.

Use **simple language**, **omit non-essential words**, and **avoid technical jargon** wherever possible.

LESS EFFECTIVE: Type user data at **login screen** and click on the **OK button** to continue.

EFFECTIVE: Enter **Portal ID** in the **Username** field and click **OK**.

Use **active voice** to make instructions clear and direct.

LESS EFFECTIVE: The Print screen is displayed by the system.

EFFECTIVE: The system displays the Print screen.

Use **present tense** to make the text simple.

LESS EFFECTIVE: The system will display the **Print** screen.

EFFECTIVE: The system displays the **Print** screen.

End each sentence with a period **unless** it could cause confusion about what to enter in a text field, in which case no period is needed.

LESS EFFECTIVE: Select **Set VPN server** and type **vpn.twu.edu**.

EFFECTIVE: Select **Set VPN server** and type **vpn.twu.edu**

1.2.3 WRITING STEP-BY-STEP INSTRUCTIONS

Step-by-step instructions should be written as a numbered list.

If the instructions apply to a specific user role with a system (e.g. instructor, student, TA, administrator, etc.), the role should be mentioned in the first line of the instructions.

Each step in the description should express a single action in the sequence of instructions and should not be overly complex or involved. If a complex process needs to be completed, it should be broken down into simpler, more explicit steps.

Some steps may require users to enter content into multiple fields within a window or require additional instructions. In these cases, it is acceptable to enter this information as a second level **bulleted** (not numbered) list. Instructions should not go beyond a second level list.

The **noun** receiving the action is usually **bolded**. Action words should be consistent within the instructions, i.e. do not use “type” in one step and “enter” in another step. A list of preferred action words and their uses is included below.

Preferred Action Words or Terms

- **Select/De-select**—For items in a drop-down list
- **Check/Uncheck**—Where a check box or option button needs to be selected.
- **Choose**—A menu option (e.g. Choose **File>Print** from the menu).
Also note the use of > to separate menu options.
- **Click**—A button on the screen (e.g. Click **OK**).
- **Double-click**
- **Download**—Usually hyperlinked to a file. (e.g. [Download \(.exe\) Symantec Endpoint Protection.](#))
- **Drop-down menu**
- **Type**—Text must be typed into a field.
- **Log on** or **Log on to**—The act of entering information to access system or account. “Log-in” is not preferred usage- unless the term appears in the user interface.
- **Open/Close**—An application or file.
- **Press**—A key or other physical button (e.g. Press **Windows key+L** to lock the screen.)
- **Right-click**
- **Tap**—Something on the screen of a touch sensitive device. **Long press** may be used for an iOS device, if appropriate.
- **Navigate**—to a site or screen

- Note the use of > to separate menu options.
- If there are two or more ways to complete a task, provide the shortest, simplest way. Don’t confuse the issue by providing multiple sets of steps.

NOT EFFECTIVE: Choose **File>Copy** or right-click and choose **Copy**.

EFFECTIVE: Choose **File>Copy**.

1.2.4 ADDING LINKS

It may also be helpful to the user to include a link to additional instructions or information in the Description text. For accessibility purposes, it is important that the text of a link is descriptive of where the link goes, preferably the name of the linked page; don’t use links that say only “click here.”

NOT EFFECTIVE: Complete the following steps **OR** [click here](#) for the Automatic Setup Tool for Outlook.

EFFECTIVE: Complete the following steps **or** use the [Automatic Setup Tool for Outlook](#).

If a link goes to a file (PDF, DOC, XLS, ZIP, etc.), include the file type as part of the link in parentheses.

For all links, you must include this text:

We do our best to link to only the best external sites but we cannot be held responsible for the quality or accuracy of such websites.

1.2.5 OTHER STYLE GUIDELINES AND CONVENTIONS

- Use bold font and/or capitalized letters, rather than quotation marks, to reference language in the user interface.
- Use the Oxford comma, i.e., wombats, unicycles, and K-popstars.
- Write in the third person (avoid we, I, and you). Note: “User” is acceptable in the KB.
- Use “and” rather than “&” unless in a trademarked title.

- “Onsite” and “videoconference” - do not hyphenate

2. CATEGORIZING A KNOWLEDGE BASE ARTICLE

KB articles will be categorized by a KCS III.

3. FORMATTING A KNOWLEDGE BASE ARTICLE (for KCS2s and KCS3s)

Consistent formatting across KB articles supports a cohesive look for the system and the information it provides, making it easy for our colleagues to follow. As a reminder, articles must follow these guidelines in order to be approved for the public KB.

3.1 BODY

By default, content entered in the Body field is in Arial 14 point font. The easiest way to ensure all text is correctly formatted is to highlight all of the text within the KB text editor, then apply the font family (Arial), size (14 point), and alignment (left-aligned) from the Description field drop-down menus. Content in the KB text editor must be set to the following:

Font family:	Arial
Font size:	14pt
Alignment:	Left-aligned
Line breaks:	A double line break (i.e. one blank line) should be entered between paragraphs.
Numbering and bullets:	Use the numbered or bulleted list icon in the toolbar to apply; do not type in numbers or bullets. Second-level lists should use bullets instead of numbers.

3.1.1 COPYING AND PASTING TEXT IN TEAMDYNAMIX

To copy and paste text into the Knowledge Base text editor, you **must** use a plain text editor like Notepad or Text Edit before copying and pasting. Formatting like bold, italics, numbering, or bullets should **only** be applied within the KB text editor.

Do not copy from Microsoft Word due to hidden formatting that affects the final article

If significant changes are required to an article, it may be preferable to delete the article and create a new one.

Knowledge Base Article Checklist

- **Title**

- Title is written

- **Description**

- Title is not repeated.
- Sufficiently answers or explains the title question.
- If copying and pasting, use a plain text editor like Notepad or Text Edit (**do not** copy and paste from Word).
- Instructions are written as a numbered list, second level lists are bulleted; instructions should not go beyond a second-level list.
- Use complete sentences with period at the end of each step, unless the period could cause confusion about what to enter in a text field (e.g. No period at the end of “*Select **Set VPN server** and type **vpn.twu.edu***”)
- Use active voice, present tense.
- No screen shots allowed.
- Links should be hidden behind text and pasted as a bulleted list at the bottom of the article.
- Each article should have the TSD contact info.

- **Text Formatting**

- Font family:** Arial
- Font size:** 14pt
- Alignment:** Left-aligned
- Numbering and bullets:** Numbered or bulleted list should be applied via the toolbar.
- Line breaks:** A double line break (i.e. one blank line) should be entered between paragraphs

TWU Technology TKB Quality Reference Guide

Grammar Counts!

- Spell and use words correctly.
- Capitalize the first word of each step.
- Acronyms must be universally known.
- Spell them out the first time (e.g., Technology Knowledge Base [TKB])
- Following reference may use the pre-established acronym (e.g., TKB)

Keyboard and Mouse Actions

Use this verbiage when writing your resolution.

- **Click** a button. Not hit or press.
- **Press** a key on the keyboard. Not hit or depress.
- **Select** an item from a drop-down list. Not click.
- **Tap** something on the screen of a touch sensitive device. Not press or touch. **Long Press** may be used for iOS interface, if appropriate.
- **Open** and **Close** dialog boxes. Not appear or display, not dismiss or cancel.
- **Navigate** to a website.
- **Log on** or **Log on to** and **Log off** or **Log off from**.
- **Navigate** to a site or screen

Keyboard Names & Functions

- Use all CAPS.
- Do not enclose keyboard key names or functions in quotation marks.
- Use the plus sign between keys that must be pressed at the same time.
- Use the actual key name.
 - Press **SHIFT+F8**
 - Press **ENTER**
 - **CRTL+ALT+DEL**
 - **SHIFT+ALT**

Structuring an Article

Ask yourself these questions when writing an article.

Issue/Question

- What is the user trying to do?
- What is the user asking?
- What user experience is undesirable?

Resolution

- How do you fix the issue?
- What's the answer to the question?

Environment

- What systems/software/hardware are involved?
- Is the issue only specific to a certain environment?

Cause

- What is the underlying reason(s) for this issue?

Keep it Simple!

- Use short, familiar words.
- Avoid jargon and slang unless it is universal, audience appropriate, and contributes to reader understanding.
- Keep it short and sweet.

Be Able to Say Yes to the Following:

- Article written from the user's perspective?
- Did you write what you know, not what you think?
- Include all steps necessary to convey the solution?
- Provided only content specific to the issue, not generalities?