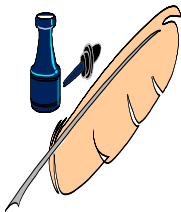


Company Styles:

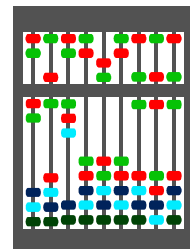
White Paper for Small
& Mid-sized Businesses©



By

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Company Styles:

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1. Introduction

This brief paper is designed to

- introduce styles, their advantages and requirements;
- describe S&C's role in style creation;
- emphasize importance of the client's role.

What Are Styles? How Are They Used?

Styles are rules for formatting documents and the templates, macros etc. for invoking them efficiently.

Example: Because it is based on the S&C style, this white paper looks like other S&C documents. It can also be (1) reformatted quickly, (2) converted automatically to other media, and (3) posted online.

Implementation

There are four primary steps to the application of styles:

1. Determine documentation needs that styles must fill;
2. Create template(s), boilerplate, and macros;
3. Draft written guidance (normally a style guide);
4. Maintain the system.

Scribble & Count can assist in the first step, perform the next two (within client-specified parameters), and then either perform the third element, or provide turnkey training.

Advantages & Disadvantages of a Style Sheet

Before committing to a style project, a company should have a good understanding, of the advantages, *and costs* of implementing styles.

Advantages (all can be maximized)

Efficiency. Paragraph styles normally have 6-12 specific characteristics embedded in them. The style can be called in a second or two; but it would take far longer *per paragraph* to define all of that. Changes can be made at the style level for all parts of a document (and for all documents based on that style).

Warning!

Warning: The power to format documents efficiently is also the power to wreak havoc with equal efficiency: know what you are doing before modifying styles.

Usability. Technical documents are much more usable when the reader knows what to expect. Styles provide consistency, so the user can concentrate on content. (*Note:* This is particularly important online, because a screen displays so little.)

Conversion & Single-Sourcing. Converting a document from one medium to another automatically absolutely requires consistent (*and compatible*) styles. Otherwise, it's a manual task as tedious and time-consuming as creating the original.

Internet Posting. Within two years, every Web document that does not conform to a style sheet will look as outdated as HTML 2 documents look today.

Recognition. Corporate image requires explicit styles consistently followed.

Costs (both can be minimized, but not eliminated)

Creation Cost. Resources (time and money) must be set aside for the project. (See cost estimate in § 4.)

Adherence & Maintenance. The expense doesn't end after the styles are created. Internal resistance to guidelines can be significant, and as the company business evolves, so will its documentation needs (and accompanying styles).

General Principals

Know why you need styles. You must want strongly one or more of the advantages listed above before deciding to proceed.

Keep styles simple. Elaborate style guides drain resources. Then the complicated result can't be followed or maintained.

Keep styles appropriate. Include only what is necessary; make form follow function.

Keep all elements mainstream. Limit proprietary features; follow accepted standards; use popular software.

Make the look distinctive. (But not cluttered, and avoid proprietary solutions.)

Keep it consistent. A good idea made crucial by online requirements.

Preserve ownership of intellectual property. Have explicit rules for promoting your patents, copyrights, and trademarks – and for acknowledging those of others.

2. S&C's Role

The previous section provided a background for style decisions. This section describes how S&C contributes to the project.

Note: One size does *not* fit all during style design. Efficient, distinctive styles are to some extent customized, so S&C requires significant client input.

Initial Applicability Determination (free & without obligation)

1. S&C discusses the advantages and costs of styles, to be sure that the potential client sees clear benefits. We leave our 2-page questionnaire (Att. A) for review.

Evaluation & Customization

2. The questionnaire is discussed in detail to determine what unique aspects might be present. Agreement is reached concerning general scope of project.
3. Any existing materials (graphics, boilerplate, sample documents) are collected.

Rough Draft(s)

4. The template(s) and sample documents derived from them are presented for review. These are revised as necessary.

Written Guidelines

5. Usage authorities (dictionary, usage authority, etc.) are chosen. (Frequently a government or industry standard is obvious from the client's operations.)
6. A brief (2-pp. maximum) procedure for template maintenance, and a style guide of agreed-upon complexity are delivered.

Maintenance

7. Turnkey training is provided to acquaint personnel with the importance, and selected individuals with maintenance knowledge.

3. Company Role

During development, the company provides the following vital input:

1. Determine basic style needs. S&C can facilitate the process, but final decisions are yours. All necessary items are on the questionnaire.
2. Disseminate importance of the project internally to gain support.
3. Limit features. S&C will work to limit style complexity, but we need your help.
4. Pick your software (authoring and graphics tools, etc.).
 - 4a. Insist that your employees *and contractors* use what you choose.
5. Critique carefully the rough draft(s) we produce; you live with the result.
6. Insist on maintaining the styles and standards we deliver.
 - 6a. Any standard deteriorates quickly without maintenance.

4. Summary & Conclusions

Need

Styles have always been valuable for print documentation: they are the most efficient way to produce materials, and they are the only way to standardize them.

This is even more true of online material, because the narrow scope of screen display creates confusion when presentation of information is not consistent. Conversion between media requires consistent use of compatible styles.

And, finally: nothing will be posted on the World Wide Web in a format later than HTML 4.0, transitional (1998) that does not have an approved style sheet. Within a year or two, nonconforming documents will look like artifacts.

Cost

Dependent on complexity: creating styles for small or mid-sized companies that produce documentation as a core product takes 50-250 hours. This figure includes in-house and outside contractor time. Style sheets for companies for whom documentation is a necessary evil, not a core product, should cost less to create.

Revision normally costs less than original creation, but not by as much as you'd expect.

Glossary

boilerplate	Stored text and/or graphics that can be called from an authoring tool; sometime macros are included. Called AutoText by Microsoft Word.
macro	A brief snippet of code that performs an action. Normally stored in a template.
style guide	(1) a general authority (such as <i>Chicago</i> or <i>Microsoft</i>) ; (2) the much briefer specific documentation that S&C produces to accompany its template(s). You need both.
single source	Creating documentation in more than one medium from a single source document.
template	As used in this white paper, the program an authoring tool (such as MS Word, FrameMaker, Dreamweaver, or HomeSite) uses to create the styles you have defined.
XML / XHTML	The new standards that separate data from formatting, and that will require the use of style sheets on the Web in the future.

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Att. A: Client Questionnaire

With styles, one size rarely fits all. Answers to these questions go a long way toward determining: (1) how much you will benefit from styles; (2) what your style package should include.

Types of Documents To Be Covered:

Internal use¹ (Please specify types):

Marketing / Sales¹

Details:

User's Guides

Emphasis: Procedure Structure Concept

How do you merge them?

[Don't worry: We'll work on this question in the evaluation]

Product(s):

H/W: Nature of Product(s):

Approx. length of doc:

SW: Nature of Product(s):

Approx. length of doc:

Other:

Print?

How bound?

How distributed?

Use color?

Revision Frequency:

Audience:

Online?²

Platform(s): Windows? Unix/Linux? Mac? Other?

Medium(s): WinHelp? HTML-based Help? HTML? PDF?

How distributed?

Revision Frequency?

Audience:

Newsletters

Purpose:

TechWriting experience of editor/contributors:

Reproduction Method:

Medium:

Reference Material

Type of Materials: Directory Bibliography? Tabular? Graphics?

Glossary/Quick-Reference? Other?

Instructional Materials

Relationship to Other Documentation:

Other

Specify:

Miscellaneous Questions:

Describe Your Documentation Dept.

(Size, expertise, etc.)

Why Are You Considering Styles?

Don't Have

Increase efficiency

Increase usability

Standardization

Create unique look

Other

Do You Single-Source?²

Do You Want To?

Any A-V?

Please Show Us Your Current Document Set:

What Do You Want to Change?

- 1.
- 2.
- 3.

Additional comments:

What Do You Want To Retain?

- 1.
- 2.
- 3.
- 4.
- 5.

Additional comments:

Anything You Think We Missed?

-
1. Most internal documentation requires a secondary template; marketing/sales materials do not fit well into normal style sheets.
 2. Well planned and implemented styles are extremely important in any online documentation; and they are absolutely essential in conversions between media and in single-sourcing.