



Style and
Usage Guide



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1. INTRODUCTION

1.1. The case for an Integware style guide

To enhance the effectiveness of Integware’s customer relations and communications, it is important that all documentation be consistent with its corporate image. Corporate identity promotes cohesiveness and establishes a sense of stability and reliability. This, in turn, instills confidence in existing and potential customers.

Similar to the way a company establishes its branding guidelines, it also must develop its own style and usage guidelines for business and technical content. A style guide is a reference document that contains a set of instructions defining guidelines for designing, developing, editing, and presenting information.

The purpose of a style guide is to:

- Enable consistency within documents and allow a consistent presentation of information across a team, a project, or the company.
- Create a familiar tone for all publications so that published documents conform to the business image and policy, including legal requirements.
- Provide a common vocabulary.
- Provide an orientation or training aid for new employees or new team members.
- Define which style issues are negotiable and which are not.
- Remove the repetition of the decision-making process and reproduction of common elements.

1.2. Developing the appropriate style guide

An effective way to create an appropriate style for content, and ensure all employees follow the style requirements, is to produce an in-house style guide backed by an industry-standard style guide (as the authority for settling discrepancies).

Table 1 is a primer on style guides. The guides listed are commonly used U.S.-based style guides for specific industries or genres.

Table 1: The top industry style guides and primary uses

MAJOR INDUSTRY STYLE GUIDES	URL	PRIMARY USE
Associated Press	www.apstylebook.com	The go-to style guide for journalists and news writing.
American Medical	www.amamanualofstyle.com	This is the go-to manual for

Table 1: The top industry style guides and primary uses

MAJOR INDUSTRY STYLE GUIDES	URL	PRIMARY USE
Association (AMA) Manual of Style		health, medicine and biology subjects.
The Chicago Manual of Style, 16 th Edition	www.chicagomanualofstyle.org	The authoritative standard for book publishing (fiction and non-fiction).
Modern Language Association (MLA)	www.mla.org/style	The style used almost exclusively for academia, and applies primarily to literature and humanities.
American Psychological Association (APA)	www.apastyle.org	The standard for social sciences (i.e. psychology, sociology, education, and politics). Sometimes used for engineering and business work.
Microsoft Manual of Style for Technical Publications, Fourth Edition	www.microsoft.com/learning/en/us/Book.aspx?ID=15053	An essential reference for technical writers, editors, journalists, and content workers who write about computer technology.

This document, the **Microsoft Manual of Style for Technical Publications**, and **The Chicago Manual of Style** will function as Integware’s corporate style and usage guides for content development and documentation.

2. INTEGWARE STYLE AND USAGE GUIDE FOR CONTENT

This section is intended to address recurring questions related to writing style and word usage in Integware documentation. This guide is not intended to replace Integware's current branding guidelines or playbook, but to work in unison with these established corporate standards to create an effective strategy for communicating and connecting with the reader.

2.1. Tone

The tone of a message is important whether writing a memo, letter, report, or any type of business document. This tone is a reflection of the writing source, and it will affect how the reader perceives the message and the company.

2.1.1. Customer stories

In customer case studies, success stories, and testimonials, strive for an objective, neutral tone. Although this type of content often includes market-oriented language, it should read as if it were written by an independent third party.

2.1.2. Technical material

For technical material such as white papers, reports, protocols, and design documents, keep the tone factual. Avoid marketing language. Readers of technical pieces are looking to Integware for technical insight, expertise, and education.

2.2. General style notes

In general, follow the basic rules of grammar and use the following style notes for Integware-specific content. For discrepancies that are not identified within these style notes, refer to **The Chicago Manual of Style** as the primary source and then **Microsoft's Manual of Style for Technical Publications** as the secondary source.

Abbreviations	Abbreviations for places (such as "U.S." or "U.K.") should maintain the periods for clarity.
Acronyms	Spell out term on first reference followed by the acronym in parentheses. Use the acronym only in subsequent references. Acronyms are usually written in all-caps and without periods (of course, there are a few exceptions).
Ampersand (&)	Do not use an ampersand (&) as a substitute for the word "and." Use it only for proper names like in Johnson & Johnson or Procter & Gamble.
Apostrophes	Do not use an apostrophe in the plural form of an acronym or abbreviation (e.g., use PCs not PC's). When using decades, do you use an apostrophe before the "s" (e.g.,

Use 1990s not 1990's).

Bullet points Capitalize the first letter after all bulleted and numbered lists. Punctuate the bulleted text according to standard punctuation rules: A complete sentence requires a period, whereas a phrase does not.

Bullet points, structure Use parallel, grammatical structure for bulleted lists: If most of the bullets in a series are verb phrases, try to make them all verb phrases. If most are complete sentences that begin with a verb, try to make them all complete sentences that begin with a verb.

Correct:

- Ensure that the sales associate understands the customer's requirement.
- Facilitate the group's overall understanding of the workshop and end products.
- Keep the customer engagement process upbeat and positive.

Incorrect:

- Understanding the need to change our approach (**verb phrase, fragment**)
- Flexibility to adapt to the client's business objectives (**noun phrase, fragment**)
- Integware offers tools and solutions that help customers make informed decisions. (**complete sentence**)

Capitalization **Titles:** Generally, the first word in a title should always use an initial capital letter and the rest of the title should be lowercase. However, when elements require extra emphasis or function as a proper noun, those words in the title can be initial-capped.

Heading and subheads: The first word in a heading or subhead should always use an initial capital letter. Capitalize the first word and any proper nouns, titles, or acronyms only. If a heading or subhead is a complete sentence, it should end with appropriate punctuation.

Body text: Capitalize the first word of every sentence, whether or not it is a complete sentence.

Captions and callouts Use sentence case structure. Punctuate the text according to standard punctuation rules.

Collective nouns Treat company and department names as collective nouns that take singular verbs and singular pronouns.

Correct:

- Company WYSI **has its** own way of managing its mobile devices.

Incorrect:

- Company WYSI **have their** own way of managing its mobile devices.

- The IT department **has its** own way of approaching cloud computing.
- The IT department **have their** own way of approaching cloud computing.

Colons	<p>In titles, headings, and subheads, do not capitalize the first letter following a colon, regardless of what follows</p> <p>Example:</p> <p>In body text, capitalize the first word following a colon if what follows is a complete sentence. Otherwise, use lowercase</p> <p>Example:</p>
Commas	<p>Use a serial comma (i.e., a comma before the “and” or “or” in a simple series of three or more items).</p>
Common nouns vs. proper nouns	<p>Avoid turning common nouns into proper nouns. Terms such as operating system and service-level agreement are common nouns that describe types of things. When these terms are used descriptively, as opposed to in Integware-branded service or solution names, they are best attributed in lowercase. This is the case even though the same terms are often expressed as upper case abbreviations or acronyms such as OS, and SLA.</p>
Dashes	<p>A hyphen is used to separate two words, as in “high-quality” phone.</p> <p>An en dash is used between dates or number ranges and includes spaces on either side of the dash, as in “1990 – 1995 or 26.5 – 28.1.”</p> <p>An em dash is used for a break in thought and does not include spaces around the dash, as in “The first thought is explained here—then the second thought.”</p>
Numbers	<p>In body text, spell out numbers one through ten; use figures for numbers 11 and above. In charts, graphs, and tables, figures are acceptable for all numbers. Use words for numbers at the beginning of a sentence.</p>
Prefixes	<p>For clarity and readability, hyphenate words that begin with common prefixes such as: non-, multi-, pre-, and co- (e.g., pre-approval, co-author, multi-tasking, non-profit).</p>
Proper names and nouns	<p>Always capitalize the first letter of proper names, proper nouns, names of countries and cities, and calendar headings.</p>
Slashes	<p>Do not add spaces before or after a slash when separating words.</p>
Web addresses	<p>When including URLs in body text, try to use short URLs that will be easy for readers to key in. In marketing pieces, bold the URL name (e.g., Use</p>

www.integware.com instead of <http://www.integware.com>).

Consistency is the ultimate goal. If you can't determine a style rule after consulting this guide or other Integware-approved style resources, follow your best judgment or ask the content provider to select a preferred style. In every instance, the goal is consistency within the document you are creating.

2.3. FDA- and Edwards-mandated terminology and requirements

Taking a consistent approach to commonly used words makes life simple for everyone involved in content creation. It reduces the number of decisions writers and editors need to make. Additionally, the customer will appreciate a more predictable experience with Integware's content.

Item Revision
workstream
IP classification
metadata

2.4. Acronym list

ACRONYM	DEFINITION/DESCRIPTION
ACN	Administrative Change Notice
API	Application Programming Interfaces
ATM	Action Transformation Matrix
BMIDE	Where the various properties for the types in the system are configured
BOM	Bill of Materials
BPA	Business Process Analyst
BPO	Business Process Owner
BU	
CAD	Computer-Aided Design
CRB	Change Review Board
CRP	Conference Room Pilot
CTQ	Critical-to-Quality
DBA	Database Administrator
DCA	Design Control Author
DCG	Design Control Group
DHF	Design History File
DHR	Design History Record
DMR	Device Master Record
DOORs	
DV	
eBOM	Engineering Bill of Materials
ECN	Enterprise Change Notice
ECO	
ECR	Enterprise Change Request or Engineering Change Request
EOL	End of Life
ER	Enhancement Request
ERP	Enterprise Resource Planning
ETL	Extract/Transform/Load process
EW	Edwards Lifesciences
FDA	Food and Drug Administration

ACRONYM	DEFINITION/DESCRIPTION
GAMP 5	Risk-based approach to compliant GxP computerized systems
GTAC	
GxP	Good x Practices, where x = Manufacturing, Clinical, Laboratory, etc.
IMO	
IP	Intellectual Property
IQ	Installation Qualification
IRDC	Item Revision Definition Confirmation
IT	Information Technology
JDE	J.D. Edwards
IV	Implementation Verification
LMS	Learning Management System
LOV	List of Values (i.e. – a dropdown list)
mBOM	Manufacturing Bill of Materials
OCM	Organizational Change Management
OOTB	Out of the Box
OQ	Operational Qualification
OQP	Operation Qualification Protocol
PCS	Product Configuration Specialist
PD	Product Definition
PDM	
PEP	Product/Equipment/Process
PLM	Product Lifecycle Management
PQ	Performance/Production/Process Qualification
PS	Product Structure
PT	Property Table
PY	
QSD	
RDD	Requirements Definition Document
RTM	Requirements Traceability Matrix
SDD	System Design Document
SME	Subject Matter Expert

ACRONYM	DEFINITION/DESCRIPTION
SO	System Owner
SOP	Standard Operating Procedure
SOR	System of Record
SOW	Statement of Work
SWQA	Software Quality Assurance
TC	Test Case
TCE	Team Center Engineering (TC3.1)
TCUA	
TO	Technical Owner
UAT	User Acceptance Test
UI	User Interface
UML	
UOM	United of Measure
URS	
VP	Validation Plan
VR	Validation Report
VTP	Validation Test Plan
WSL	Workstream Lead

2.5. Glossary

TERM	DEFINITION
21 CFR Part 11	FDA guidelines on electronic records and electronic signatures, under which electronic records and electronic signatures are considered to be trustworthy, reliable and equivalent to paper records
Affected Item	The Item Revision that the Solution Item revision is replacing, typically it is the latest released revision of the Solution Item that are proposed to undergo change. The Affected Item is compared with the Solution Item to determine what has changed.
Approval Workflow	The component of the paper prototype set of artifacts that show the groups and roles involved in approving or releasing information for general business consumption. The workflow definition also shows the proper business order of the sign-off steps. This can also be defined for an intermediate state transition when accountability needs to be recorded.
Assembly	A structured collection of parts. The assembly is also a part and is an intermediate point in the eBOM or mBOM.
Change Review Board	The approvers required for an ECR to be formally approved within the Enterprise. The required CRB approvers are dynamically determined. The Release Level and Category of the ECR determine the organizations required. The Change Initiator selects the individual approvers for each organization.
Change Manager	An OOTB Teamcenter application that helps enable users to track changes to a product throughout its life cycle. It provides change dashboard capabilities and an integration with Schedule Manager to easily manage implementation plans for changes.
Dataset	Workspace object used to manage data files created by other software applications; each dataset can manage multiple application files, and each dataset references a dataset tool object and a dataset business object.
Design Document Workflow	Process for releasing a Design Document without an ECR. This lightweight process is applicable for individual documents and contains collaboration (optional) and approval tasks.
Document	A generic term used to cover any file of formatted information that is attached to an object in the PLM system
Engineering Bill of Materials	The structure of the parts and assemblies that make up the product from the view point of the design engineer. This structure concentrates on the functional realization of the product requirements
Enterprise Change Notice	The ECN provides the implementation plan to resolve one or more enterprise change requests (ECRs) or a portion of one ECR. An ECN identifies all items affected by a change and authorizes the actions that address a change.

TERM	DEFINITION
Enterprise Change Request	The ECR is the next level of maturity of change definition after the Impact Assessment. Here additional analysis occurs, Solution Items are provided, and any necessary organizational collaboration occurs. Once the content is deemed ready, a review by PCS is conducted and formal CRB approval to approve the ECR is completed.
Enrichment	Also called data enhancements or data cleansing. Being used to supplement the source data from their legacy system TC3.1.
Group	A group categorizes Users within an organization (e.g., Engineering or Manufacturing). Groups can have hierarchies. A user can be a member of one or more groups.
Impact Assessment	The Impact Assessment captures the information related to the initial assessments for a proposed change that ensure no other work on this change is underway, that the change is categorized correctly, as well as documenting any functional impacts the change may have on the Enterprise.
Information Model	The component of the paper prototype set of artifacts which models the business information using object oriented and UML based techniques
Item	A system object that represents a unique informational piece.
Item revision	An Item has at least one revision, where the revision represents a controlled change of the information. The change can be the result of several editing actions
Jar file	
List of Values	A preset collection of values shown in drop-down list form.
Manufacturing Bill of Materials	The structure of the parts and assemblies needed to manufacture the product. The mBOM adds additional parts to the eBOM for those parts needed to manufacture the product, such as cleaning a part prior to assembly. The mBOM is a superset of the eBOM. The mBOM can have different assemblies from the eBOM to represent the physical construction steps of the product
Navigation Page	
Object	A generic term for a unique, single piece of information in the system such as an item, a revision, a dataset, etc. This term will be used as a shorthand rather than list all the PLM types of information containers, including the specialized ones for the regulatory solution.
Organization Model	The organization model is used to define the groups and roles needed within the business and system. The groups and roles are used to define access permissions for creating information objects, modifying them, taking part in approval and other processes, etc. At the design and implementation level, people will be assigned to one or more groups and roles. Multiple tables in the form of a spreadsheet often works to display this data as sorting of the long lists can be useful

TERM	DEFINITION
Out-of-the-Box	Intrinsic PLM functionality or capability that does not need to be programmed or configured for use.
Part	A physical component used in the construction of a product. The part might have a geometric definition represented by a 3-D model or it could have a specification, such as adhesive. The complete definition of a part might have both a geometric component and multiple specifications. There can be software parts also that need to be controlled.
Process Owner	User who initiates a workflow process
Product Configuration Specialist	The PCS group commonly refers to an organizational group within Edwards responsible for Verification of Changes. PCS users in the PLM system are called "Change Analysts."
Product Definition	Product definition is the total sum of information that defines a product, what it does, how it does, it how it is built. It includes all the information from initial idea through the end-of-life of the product.
Property	Items and Revisions have properties. The properties are used to categorize data and perform searches. Users select values or type-in information for these properties.
Role	A role provides the functional categorization for users to perform actions. A User can be assigned multiple roles.
Schedule Manager	An OOTB Teamcenter application in that enables users to plan and track activities in Teamcenter. It is a fully functional project scheduling and management application. Phase 1.1 of Ignite will <i>not</i> use the complete stage/gate project management capabilities. Schedule Manager will be used to schedule implementation activities (work breakdowns) associated with ECNs, and will utilize the OOTB integration with the Change Manager application.
Schedule Work Breakdown	A pre-defined, finite amount of work to be accomplished that is broken into smaller component parts called tasks.
Subject Matter Expert	A person who is considered an expert on a particular topic or subject.
Solution Item	The new Item Revision released with the change and has a release status attached to it. The item revision may be a new component part which replaces the old component. It may also be a new assembly being released.
Structure	A revision (parent) that contains one or more subordinate item (child) components.
Structure Manager	

TERM	DEFINITION
Supporting Material	Supporting Material are the references to information to support the change. Some supporting material applies to the change itself, and some applies to specific Affected, or Solution Items. This reference information is provided to support and justify the change or the reasons why the Change happens in a certain way. Supporting materials are not undergoing the process of change themselves.
Summary Report	A report for which no item or item revision in the system needs to be selected by the user. Summary reports provide results for multiple objects within the system based on the report definition.
Task	An independent unit of work within a Schedule Work Breakdown that is assigned to specific users to complete.
Teamcenter/Ignite System	Edwards' version of Teamcenter that has their configurations (Teamcenter "out-of-the-box")
User	A user in the system performing an action. (Relates to an employee who has a PLM user account and access to the PLM System.)
View Pane	
Work Pane	
Workflow Process	An instance of a workflow, used for routing of Items and Item revisions for a change in status.

3. PARTING THOUGHTS

Consider these guidelines as a valuable tool for helping you develop business documentation that is consistent with Integware's values, professionalism, and personality.

- Company standards and style guides are part of the overall company guidelines required for producing consistent content and documentation.
- It is the responsibility of all content developers to ensure that the documents they produce adhere to these guidelines.
- It is important that team leaders ensure adherence to these style guidelines from their respective content development teams.
- This style guide should be updated regularly and made available to the entire team in a central and easily accessible location.

3.1. Additional resources

- www.whatis.com – The leading IT encyclopedia and learning center
- www.websters-online-dictionary.org – Webster's Online Dictionary with Multilingual Thesaurus Translation
- www.m-w.com – Merriam-Webster Online Search
- www.webopedia.com – The only online dictionary and search engine you need for computer and Internet technology definitions.

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