Creating a Style Guide – A Case Study of Sandvik Mining and Construction Hard Rock Mining Project

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Teknisen viestinnän piirissä on viimeisen vuosikymmenen aikana tapahtunut selkeä muutos dokumentaation tuotannossa. Yhä useampi yritys on siirtynyt perinteisestä lineaarisesta dokumentaatiosta modulaariseen ja rakenteiseen dokumentaatioon sekä yksilähteistämiseen, joissa dokumentaatio koostetaan itsenäisistä moduuleista kulloisenkin julkaisun vaatimusten mukaisesti. Uudet metodit ovat tuoneet mukanaan uusia haasteita ja vaatimuksia, joista keskeisin on moduulien yhdenmukaisuus. Tärkein keino varmistaa tämä yhdenmukaisuus on luoda tyyliopas, johon on kirjattu ohjeet dokumentaatiossa käytetystä tyylillisistä seikoista, kuten esimerkiksi käytetystä kielestä, terminologiasta sekä informaation esityksestä ja jäsennyksestä.

Tämä tutkimus keskittyy tarkastelemaan tyylioppaan luomista kahden tapaustutkimuksen kautta. Tutkimus keskittyy erityisesti tyylioppaan suunnitteluun: mitä seikkoja tyyliopasta suunniteltaessa tulisi huomioida sekä millaisiin ongelmiin varautua. Tapaustutkimuksen kohteena on sekä palveluyrityksen että asiakasyrityksen tyylioppaan luominen, ja näitä kahta on verrattu toisiinsa erityispiirteitä ja yhtäläisyyksiä hakien. Tutkimuksen lähdemateriaalina on itse tapausten lisäksi käytetty tyyliopasta ja teknistä viestintää käsitteleviä artikkeleita ja käsikirjoja.

Tutkimuksen tavoitteena oli tuottaa käytännön tietoa tyylioppaan suunnittelusta sekä itse projektista. Tutkimus toi esiin erityisesti palveluyrityksen ongelmat sovittaa tyyliopas usean asiakkaan vaatimusten mukaiseksi. Asiakasyrityksen puolella tyylioppaan luominen näyttäytyy ongelmattomampana; suurimmat ongelmat syntyivät projektin globaalista luonteesta sekä laajasta skaalasta. Lisähaasteetta tyylioppaille kummassakin tapauksessa tuottivat vaihtelevat käytännöt, työkalut ja metodit sekä kohdeyleisö.

Avainsanat: tekninen viestintä, dokumentaatio, single sourcing, tyyliopas

1. Introduction

In recent years, modular documentation and single sourcing have been the buzzwords in the field of technical communication. Companies in increasing numbers are changing their documentation processes from traditional linear documentation to modular documentation. Striving for increased efficiency and productivity, and reduced costs and production times seems to be the overall trend in the whole of the business world. Technical communication business is no different in this respect. Modular documentation and single sourcing seem to be the answers for this call. These new methods for creating documentation will have their challenges as well. Ensuring the stylistic consistency of documentation will be one of the key concerns that arises as the documentation processes are changed. One solution to this problem are style guides that provide writers with guidelines for documentation.

The aim of my Master's thesis is to take a closer look at the creation of a style guide to be used in single sourcing and modular documentation. The thesis will approach this matter through two actual cases, creating the style guides for Etteplan Technical Information Oy (ETI) and Sandvik Mining and Construction Hard Rock Mining (SMC HRM), a service provider and its client. Single sourcing and modular documentation will create the framework for both the style guides.

Besides utilizing these methods more and more in the commissioned documentation, ETI also provides training and single sourcing solutions, e.g. a content management system, to its clients, which makes single sourcing and modular documentation a cornerstone of ETI's operations. On SMC HRM's side, the thesis is connected to a project aiming to harmonize documentation in different production units. The ultimate goal is to transfer all documentation into modular form and to introduce single sourcing to all SMC HRM documentation. The project is commissioned from ETI, which is also otherwise largely responsible for producing the Sandvik Mining and Construction's (SMC) documentation. At the moment, the SMC HRM

production units in the HRM project include factories in France, Canada and Finland, but the processes and the style guide created in this project will be extended to encompass the whole SMC in the future.

I will concentrate on the planning phase of style guide development: what has to be taken into account, which things are the most crucial ones for a successful style guide and what kind of problems need to be solved during the planning phase. Since the SMC HRM style guide will be based on the ETI style guide, this also offers an opportunity to compare the planning of a service providing company's style guide and a client's style guide.

Although the thesis will concentrate on a specific case, I think that the same issues and lessons learned can at least to some extend be applied to any style guide design project. This thesis might help organizations and companies in the transition phase to modular documentation and single sourcing, acting as an example on style guide creation.

As my source material I have used handbooks for technical writing and editing, books on single sourcing and structured documentation, articles in various journals and magazines in the field of technical communication and conference proceedings. Although, as Barker (1998, 233) states, there is an abundance of different style guides for technical writing, I have set them aside as source material. As the style guides usually are just compilations of different rules, guidelines and recommendations, they offer little information on creating a style guide.

I find two handbooks especially useful for the subject of my thesis. The first is Ament's *Single Sourcing; Building Modular Documentation* (2003) which discusses single sourcing in detail and thus provides good framework. Ament also takes a more practical approach to his subject and gives direct instructions on how to succeed in single sourcing. The second handbook is Tarutz's *Technical Editing: The Practical Guide for Editors and Writers* (1998) which gives excellent analysis on creating a style guide. In general, it seems to me that books on technical

editing offer more guidance on style guides and how to develop them than other books on technical communication.

I have used plenty of articles as source material for my thesis. They seemed to offer much more discussion on style guides and single sourcing than handbooks on technical communication. The most prominent source for the articles is *Technical Communication*, a journal published by Society for Technical Communication. A vast number of articles on technical communication is available online, providing an easy access to valuable information, an opportunity I have freely used.

There are also few notable Master's theses that deal with the subject. The main interest of *Towards content management with a dynamic style guide* (2004) by Hietala lies in using dynamic style guide, i.e. structured documentation, templates, computer macros and built-in reference tools, as a way to content management system but his thesis deals extensively on the more traditional style guides as well. Koikkalainen presents a detailed view on single sourcing in her thesis *Single sourcing: a system for reusing information in documentation* (2002). Another related thesis that supports the other two is *Aspekteja kielen kontrollointiin erityisesti teknisen dokumentoinnin näkökulmasta* (2003) by Ronkainen.

As for the case studies, in addition to the source material already mentioned I have also used some further publications. In developing the ETI style guide, I used the European standard 62079:2001 *Preparation of instructions –Structuring, content and presentation* (2001) and SFS-käsikirja 174-1:2006 *Tekninen dokumentointi. Osa 1: Informaation jäsentely, dokumenttien luokittelu ja dokumenttien hallinta* (2006), both published by The Finnish Standards Association, and *Käyttöohje on osa tuotetta: Käyttöohjeen laatijan opas* (1991), published by insurance company Pohjola. The style guide team also used group sessions with the content producers to find out first-hand information on the style problems that surfaced often in their

work. For the SMC HRM style guide, a short e-mail query was made to find out some background information.

The thesis will proceed from theory to practise. I will start by clarifying the concepts of single sourcing, modular and structured documentation, and style guide. Then I will take a look into reasons why corporations may want to create a style guide, as well as why some people criticise style guides. After presenting the theoretic framework for style guides I will move on to investigate the creation of a style guide through two case studies. The creation process of the ETI style guide will illustrate the process from a service provider's viewpoint, whereas the SMC HRM will concentrate on the planning of a client's style guide. Finally, I will conclude by presenting a process model for developing a style guide.

2. Key concepts

2.1 Single sourcing

Brierley (2002, 15) has defined single sourcing as "a documentation workflow that creates multiple deliverables from one unmodified source document", unmodified meaning that the source document is not edited or modified in any way in the process of creating the deliverables. The information content is separated from the format which is not applied to the content until the modules are assembled into a document, thus enabling effective and uncomplicated reuse.

According to Ament (2003, 15–17), the deliverables (documentation) can be created in two ways: they can be either re-purposed or reassembled. In repurposing, the same content is published in different media[1]. Repurposing should not be confused with merely mechanically converting document or information to another media. Repurposing also requires modifying the content in order for the information to make sense in another media as well.

In reassembly, the contents of the document are rearranged to form a new document, possibly in a new format as well (Ament 2003, 17). Although the factual contents remain the same, they may not be presented in the same order. As Hietala(2004, 12) sums it up, single sourcing makes it possible to create documentation from the same information content for different purposes, different user groups and different media.

Ament (2003, 3–7) states that single sourcing is a method for systematically re-using information. In my opinion, "systematically" is the key word here. Although some reuse can exist even in linear documentation, it does not fulfil the characteristics of single sourcing. This can only be achieved with modular writing.

1. Brierley's definition of repurposing is wider than Ament's. According to Brierley, in repurposing an existing document, made for one deliverable, media or audience, is used for another deliverable, media or audience. (Brierley, 2002, 15).

According to Koikkalainen (2002, 9–10), single sourcing requires modular and structured documentation to be successful, but not vice versa: modules can be written without any intention to re-use them. Although single sourcing will be more efficient with structured documentation, it does not fail without it. While Koikkalainen seems to be leaving some chance of success for single sourcing without modular documentation, Ament (2003, 3) takes a stricter stand to single sourcing: “If your content is modular, your single sourcing project succeeds. If not, it fails.” I will return to both modular and structured documentation in next chapters.

In single sourcing, the separate information modules are saved into a database and then, as needed, assembled into a document. This is what makes the reuse systematic. The connections between modules are formed in this phase by cross-referencing, linking them with textual or hyperlinks and creating a table of contents and indexes. As the modules may be arranged in different order according to the needs of the document, cross-referencing has to be absolute rather than relative, using the titles of chapters, tables and caption rather than referring to chapter or page numbers. Referring to modules as “previous” and “next” or “above” and “below” would diminish their reusability of a module as the module that is being referred to might not be anywhere near. (Ament 2003, 11, 54–61.)

The document can be created for any media using the same module reservoir. The puzzle is just put together to fit the media.Yet, according to Ament (2003, 16), although even linear documentation can be published in different media, like a printed manual and an online help, this is not, in his view, really single sourcing. However, by simply changing the media without any consideration on modifying the content as well the question whether the material is at all usable in the other media is neglected (Koikkalainen 2002, 10).

2.2 Modular documentation

In modular documentation, the content, which like in single sourcing is separated from the format, is produced in small independent sections, modules, and not as a whole document

(Koikkalainen 2002, 9). This central idea differentiates modular documentation totally from traditional linear documentation, where the document is produced as one large chunk, from beginning to the end. The second big difference in modular documentation as contrasted with linear documentation is the number of writers working on the same document. In linear documentation, it is common for one writer to write a complete document all by his- or herself, whereas this often is not the case in modular documentation. Ronkainen (2003, 17) summarises well the challenges this new situation brings. As the document is assembled from several modules that can each be written by a different writer, there may be many writers working on the same document, and the writers may not even be precisely aware where the text they are writing will be used.

As the order of the modules may vary from document to document, each module should make sense and function on its own, without the context of a whole document. In other words, the information content is divided into meaningful components. The different information types, like warnings, descriptions and procedures, are separated into different modules; one module contains only one type of information. These demands lead to the fact that the modules are short and focused, with only the relevant content included. Because the modules can be arranged in any order whatsoever, they have no prescribed reading order or hierarchy. (Ament 2003, 5–6.)

Because the content in modular documentation is divided into several small files instead of a one big file, the file amount increases dramatically. The increased file amount means that a special means are needed to control the chaos, for example, keeping up with updates. As an answer for this, different content management systems are used in modular documentation to keep track on modules, their versions and translations, to name but a few.

2.3 Structured documentation

In structured documentation, technical documents or modules are produced according to a certain prescribed structure. In the context of ETI, this structure is DITA, Darwin Information Type Architecture.

DITA is an information architecture, based on eXtensible Markup Language (XML), for authoring, producing, and delivering modular technical documents that are easy to reuse for different publishing needs. In DITA, a document is made up of several topics, or modules, each of which containing only one type of information. In DITA, there are three core information types: conceptual, task and reference. Different information types support different kinds of content: task information typically describes a procedures, conceptual provides general and descriptive information and reference information can include, for example, technical specifications. (Day et al., 2005).

The structure defines what elements are required or allowed in the document and in which order they can be arranged. In addition, the information is tagged with metadata to provide information about the structure and content of the module or document. Tagging also separates the format from the content as style attributes are linked to the tag itself rather than to the content. (Ibid.)

Although modular documentation has become almost synonymous with structured documentation, they are two separate things. In structured documentation, the content can be one large chunk with no separation into smaller pieces that modular documentation requires. While structured documentation requires the use of a structured markup language, the most common being SGML (Standard Generalized Markup Language) and XML, modular documentation can be done even without using any markup language (Koikkalainen 2002, 9–10). The markup languages usually require editors and special applications in order to be

efficiently utilized, but modular documentation will succeed with, for example, mere Microsoft Word or even Notepad.

2.4 Style guide

According to Price and Korman (1993, 143), the concept of style can be defined on two levels. First, it can be defined as "the acceptable mechanics of the language in which we write[2]", such as grammar, punctuation and word choices. Second, it can be defined as the voice we use in our communication: our choice of words, active or passive and so on. Having defined style, Price and Korman move on to defining style guide as a document which sets standards for both the mechanics and the voice, and it also keeps record of the made decisions.

Barker (1998, 243) goes more into detail and defines the style guide as "a book or book-length collection of conventions of grammar, punctuation, spelling, format and other matters associated with written and online text." Barker's definition represents the classic idea of style guide as a book that aims to cover all the style issues that may arise in a documentation process spiked with instructions on writing and format. Damrau (2005, 356) adds more abstract qualities to Barker's definition. As well as with the general style issues, Damrau sees the style guide as embodying also the corporation's ideology, its culture and values. This may well be the case, since, as Baumert (1999) says, many style guide include instructions on the corporation's brand, like the use of logo and layouts for different publications, such as the manuals, memos and reports. In my view, as style guides themselves aim to presenting an unified image of the corporation to the customers, and as this unified image ultimately include also the more immaterial qualities, like values, Damrau's claim is well justified.

A voice of dissent towards the traditional definitions of style guide comes from Jones (1998, 3). Jones does agree with many other authors on his definition of style as to include, for

2. Oddly enough, Price and Korman define the style to apply only to written language; in my opinion, "communicate" would be a better word here, as it does not restrict the definition unnecessarily – after all, not all communication even in the field of technical communication is written.

example, the choice of words, coherence and tone. However, he is highly dissatisfied in definitions that, for him, seem to go beyond stylistic matters:

> Part of the confusion about defining the technical prose is caused by a broad view of what encompasses style in this area. Corporate style guides in many industries have helped to create the impression that all of the rules and conventions to be followed by a company in creating its documents are matters of style. This kind of style guide typically covers agreed upon conventions for format, punctuation, spelling, grammar, illustration, design, and tone. [...] These style guides leave us with the impression that everything in the documentation process – from planning to production – is a matter of style.

Even though Jones wants to completely eradicate a great deal of standard style guide contents, perhaps even too zealously, he is, in my opinion, correct in some of his points. This is especially the case with design and process information, as can be seen from the following.

As Jones says, many style guides do dedicate page after page for information on layout, text formatting, font sizes and so on. However, as already established in the previous chapters, single sourcing, modular and structured documentation each seek to separate the format from the content. According to Weber (2007), as these new documentation methods are taken into use and applying format to content is automated, including detailed information on format and layout becomes redundant. As she continues, there is also a second reason to leave design information from the style guide. Details on design may be decided on corporate level to make sure the corporation's brand remains unified. If this is the case, there is no leeway for individual modifications of the design, and it is more reliable to use templates that will help to retain the unified look. Furthermore, the format may be applied to the content by some other department than the documentation department, for example, marketing department, or even by a third party organization.

Neither is Jones alone in his wish to leave out all process information from the style guide. In addition to Weber, who again shares Jones's view, Tarutz (1998, 206) is also against including process information, such as what different roles are involved in the documentation process and when and how to perform specific actions, in the style guide. According to her, there are three

main reasons to keep process information separated from the style guide. First, mixing process information with style information makes the style guide hard to use as it makes finding answers to style problems hard. Second, the processes tend to change rapidly but stylistic decisions usually change much slower, making the writers to doubt the accurateness of the stylistic information. Third, if the style guide is used by several documentation teams, it is very likely that their processes differ from each other, making the process information hard to use in a different unit than for which it was created.

In Tarutz's view this kind of information is better reserved for a process guide a guide that "covers the internal procedures in your company and/or department". Weber (2007) agrees with Tarutz; according to her the process information ends up in the style guide mainly because it is considered to be important, but nobody really knows where to put it. Creating a separate process guide to cover corporation's processes would perhaps offer a logical place for this kind of information.

Weber (2007, emphasis on the original) also offers another, more detailed definition of a style guide:

> A *style guide* is a reference document that includes rules and suggestions for writing style and document presentation. Style guides often specify which option to use when several options exist, and they include items that are specific to the company or industry and items for which a "standard" or example does not exist through commercial style guides. The specific content in the style guide is not usually a matter of "correct" or "incorrect" grammar or style, but rather the decisions you or your employer or client have made from among the many possibilities.

As Weber says, it is not so important to make a "right" decision rather than making a decision and sticking to it. As Price and Korman (1993, 143) conclude, style guide is a reminder on the decision that have been made earlier. Without style guide, it would be quite impossible to keep track on past decisions and also to share the decisions with others. Price and Korman quote Meryl Nachez, whose words crystallise the style guide's benefits in this respect: "A good style guide lets you built on what has gone before, refining and improving rather than

continually reinventing". The good decisions are remembered and honed further, and the style guide helps to avoid making the same mistakes or revisiting the same issues time after time.

In this thesis, I will base my definition of the style guide to Weber's definition. As style guide in this thesis, then, is a publication that records decisions on stylistic issues and conventions of good technical writing plus other decisions that affect the appearance and quality of the documentation, such as the use of images. Although Weber sees the images as a part of the process guide, I think that some aspects, like the interaction between images and text, would fit the style guide as well.

In her definition for style guide, Weber is making a distinction between two groups of style guides: the generic commercial style guides and the house style guides. Next, I will take a closer look at these two as well as the discussion on the benefits and disadvantages of style guides.

3. Style guide rationale

Before embarking on analysing the creation of a style guide with case studies, I will take a closer look on style guides. I will introduce the two different style guide types, reasons why corporations may want to develop a style guide, and the main points style guides are criticised for.

3.1 Two types of style guides

Corporations use two kinds of style guides: commercially available generic style guides and house style guides. A generic style guide usually is an all-encompassing mammoth of a book, covering all the style issues that generally arise in writing, not merely in technical writing, and which, like said, are available for everyone to purchase. The most famous generic style guides are *The Chicago Manual of Style* and *The Elements of Style*.

But as Gelb and Gardiner (1997) state, the generality is also the main weakness of generic style guides. The great number of topics diminishes the depth with which they are dealt with and, on the other hand, it would not be possible to include all the "special cases" even in the largest of generic style guides. The biggest problems with generic style are that they:

- do not address issues specific to technical publications,
- provide several acceptable alternatives rather than a single style, and
- are so large and broad that users may hesitate to use them and may not be able to find what they need[3]

This is where house style guides step in. Mackay's (1997) definition of the house style guide is clear and concise: "A house style guide is one that is produced for an organization's internal use and is specifically tailored for its specific writing contexts." House style guide's

3. As Stephen Gale (1996) so aptly puts it: "It is ironic that many of the existing Style Guides [sic], aimed at producing usable systems, are themselves difficult to use."

task is to take up where the generic style guides leave off (Tarutz 1998, 186). As Hart (2000) quite fittingly puts it, a generic guide covers 90% of a corporation's style problems adequately, but 10% of the style problems remain unanswered. These remaining problems are those special cases, unique to the corporation or to its field, that house style guides are more adapted to handle. Magyar (1996, 540) presents process and product terminology as examples on such information.

3.2 Benefits of having a style guide

As the creation process of a style guide takes both time and money and the main goal of the corporate world is making money, not spending it, there must be something to be gained from the style guide. What kinds of motivations the corporations have, what are the benefits a style guide can offer?

Gale (1996) provides a comprehensive list of benefits of a style guide for the different groups, from management via content producers (writers, illustrators etc.) to end users. Although Gale's list originally describes style guide benefits in the framework of IT business and software documentation, it can, in my opinion, be generalized for any technical documentation. The table below has been adapted from Wilson's (2001) summary on Gale's findings:

Table 1: Benefits of a style guide for different groups involved in documentation

Management	Content producers	End Users
Produce usable products that increase user satisfaction and reduce support costs	Maintain control over look and feel	Reduced errors
Increase market awareness	Minimize re-invention	Less frustration
Increase product awareness	Capitalize on learning	Increased morale
Reduce training costs	Enable production of reusable content	Improved efficiency
Improve staff retention	Reduce production time	Increased confidence
Increase user acceptance of new systems	Reduce arbitrary decisions	Reduced resistance to new technology
Improve corporation image	Control 3rd party request for alterations	Improved usability of the product or documentation

As seen from the table, in ideal case a style guide can have a positive effect on each of the groups. Management will be pleased to see decrease in costs and increase in incomes, as increased user satisfaction increases sales and less money goes into technical support or training the staff. Content producers will be glad on the lessening amount of duplicate work as more and more of the content can be reused, and should they run into a stylistic problem they can solve it easily. Finally, the end users will get improved quality and usability.

Allen's (1995, 284–285) analysis is much more concise than Gale's, but all the reasons on Allen's list can also be found on Gale's list. According to Allen, the four most commonly mentioned reasons for developing a style guide are:

1.creating consistency in documents,
2.promoting a professional image,
3.training new employees and
4.guiding document generation.

The fifth reason is seldom mentioned outright, at least by other than business people. According to Allen (1995, 285), reducing costs is the predominant reason why corporations should develop style guides:

> When poor writing skills are combined with a lack of time to write, the result can be devastating. One solution that does not involve the extravagant expense incurred by hiring additional employees or scheduling expensive training courses is to adopt a corporate style guide. . . . [C]orporate style guides are a relatively inexpensive tool to improve corporate writing, foster consistency in corporate documentation, and provide a source of training for new employees.

Mackay (1997) supports Allen's view on the importance of economic gain as a motivation behind developing a style guide. Although savings made with style guide are not openly admitted as the main reason, they can be deduced from other reasons. For example, when the style guide is said to reduce the time writers and editors spend arguing about stylistic issues, the company is also reducing documentation's costs.

According to Allen (1996, 240), the most often mentioned reason for a company to develop a style guide is ensuring consistency throughout its documentation. It is, in fact, goal of every style guide (Wilson 2001). Consistency is especially important when there are several writers and several products to document (Tarutz 1998, 186). As Hart (2000) so conveniently sums it: “Style guides fill the gap between the need for consistency and the means of being consistent”.

Consistency improves company’s documentation – or any communication, for that matter – as it ensures that everyone uses the same voice, language and style. This in turn has its positive effects on, for example, internationalisation, translations and localisation. According to O’Neill (2002), using style guide will help to make documentation easier both to internationalise and to localise. Baumert (1999) agrees on this with O’Neill. He states that a style guide can greatly reduce the translations costs. When same language is used in the documentation of different products, the translation memories can be used to their full potential, as when the text to be translated is compared to previous translations more shared content is found and duplicate work eliminated.

Perlin (2002, 34) states that because single sourcing is getting more refined with the increasing use of XML and content management systems, its material should also become more refined. Higher degree of consistency is needed in order to achieve fully reusable material. Ament (2003, 22, 149) shares Perlin’s view. According to him, modular writing determines the success of single sourcing, and to succeed modular writing needs shared regulations. In order to be truly reusable, the modules should be consistent and form a unified whole when combined as a user instructions. By configuring the language of the modules to conform to the default values set in a style guide, the modules can be combined in any order and for any media without any clashes in style.

Another important factor with a style guide is that it also helps the company to improve its image. Although inconsistencies in writing style, usage or even pure spelling or other errors may not affect the user's ability to understand the instructions, they convey an unprofessional image. Using a style guide will help to create documentation that is consistent in every aspect and appears as an unified whole, with no distinction between different writers visible in the text. This, combined with avoiding errors, will help the company to present a professional image to its customers. (Ament 2003, 149).

A style guide can also be useful in training new staff. As it records stylistic decisions in one place, it can effectively introduce the house style to a new writer. However, style guide cannot function as the sole training material. As already concluded, the process information should be kept away from the style guide, which means that for the new employee to learn the tasks of his or her job a process guide is needed to accompany the style guide in training. Weber (1997) reminds us on the nature of the style guide as a reference material, to be consulted when a problem arises rather than as a training tool.

Another positive effect a style guide has is that it makes the collaboration between the different people participating in the documentation process more effective. According to Ament (2003, 8, 45), establishing writing guidelines reinforces team synergy, as they provide the means to create texts, illustration and modules that are in harmony with each other. As the aim in single sourcing is to produce reusable content, everyone is motivated to create modules that "mesh, not clash". Thus every one will pull together to enforce the agreed guidelines. In my opinion, this can well be the case with single sourcing, where the way of producing documentation itself makes cooperation and conformity vital. However, I am not so convinced that shared style guidelines can raise the same level comradeship in linear documentation.

According to Ament (2003,149), the style guide can also improve the usability of documentation. The guidelines can be built so that the instructions are as user-friendly as

possible: for example, style guide can instruct the writers to use active voice, parallel constructions and concise, simple sentences to make it easier for the user to understand the instructions correctly and more quickly. Writing the guidelines for user-friendly instructions down in a style guide makes the user-friendliness the default value of the instructions. Of course, this will only apply if the style guide is actually used when writing the instructions and if the subjective style decisions are thus replaced by shared style guide regulations.

Haramundanis (1998, 62) agrees with Ament in that consistency in documentation can greatly benefit the user. Consistency helps the user to understand the instructions. This is especially clear with the concise use of terminology. If the same thing is referred to with many different terms, the user may get confused with them; it may not always be clear whether the terms are referring to the same or different things (Alred et al. 1992, 228).

3.3 Criticism towards style guides

Although style guides are usually seen as a boon and only in a positive light, there has also been few voices of dissent. The critics of style guides usually do not object to the concept of stylistic guidelines or rules for documentation in general but the arbitrariness and lack of flexibility in the way these rules are enforced. Even the critics, then, are not anarchists that oppose rules just because they are rules, but only some aspects of them. (Mackay 1997.)

In my view, the most common critique against style guides seems to be that they kill creativity. The writers are not allowed to express themselves to their full potential as the style guide limits the repertoire of stylistic variation. Another limitation is the control on the language many style guides aim to impose by setting rules on correct, incorrect and preferred usage. The criticism may stem from bad design of the style guide as helpful tools in general are rarely criticised.

Hart (2000) acknowledges the need for creative expression even the writers of technical documentation may have. On the other hand, he also relies on the writers' self restraint in controlling the amount of the creativity in the instructions:

> Although "elegant variation" (using synonyms and fancy language for the sake of variety) provides essential color and texture in creative writing, technical communicators generally avoid this form of elegance because popular consensus holds that such variation risks confusing less-sophisticated readers.

Wieringa (1995, 102) is of similar opinion with Hart. According to Wieringa, writers sometimes employ literary devices, which may not obey the rules set in a style guide or even grammatical rules. He also makes a further point that the use of jargon should be acceptable in some cases even without lengthy explanations on its meaning, such as with a target audience familiar with the subject or product.

Hart and Wieringa have a point in saying that style guide restricts the creativity of technical writers by setting guidelines the writers are supposed to follow. What strikes odd, however, is the venue of this creativity. Is technical documentation really a suitable venue to exercise one's literary creativity or might this, as Hart himself suggests, have a negative effect? On the other hand, the stylistic tricks and literary devices may well have their place in, for example, marketing material, in which case the style guide, if applied to all this material as well, may decrease the effectiveness of the text. In these cases the critique would be justified.

As for Wieringa's demand for "legalising" jargon, it is only sensible to take the target audience's level of knowledge on the subject into account and use jargon the users are familiar with freely. Tarutz (1998, 211) agrees with Wieringa in this matter. She also points out that sometimes using jargon may even make the text better: if the target audience knows the jargon, it may be able to convey the same information much more efficiently than a non-jargon expression or explanation. In my opinion, however, this kind of audience-optimising may have a negative effect on the reusability of the text, since if the same text is used for an audience with

less knowledge on the subject and jargon, they will not be able to fully grasp what is meant with jargon without them being provided some sort of explanation (e.g. glossary).

4. Creating the ETI style guide

As the ETI style guide is the starting point for the SMC HRM style guide, its creation process is worth analysing first. The analysis will also demonstrate the difficulties that arise when creating a style guide for a service provider that has multiple clients.

4.1 Motives for creating the ETI style guide

In the autumn 2007, the need for creating a style guide for ETI was admitted. The decision to create a style guide was part of a more general discussion on improving the quality of documentation produced in ETI. As the company was applying for the ISO 9001 certification, written common guidelines for processes and for ensuring quality were required. In fact, according to Magyar (1996, 541), poor quality documentation or inadequate control over it are among the most common reasons for failing the certification process. These are both things in which having a style guide helps tremendously.

In addition to applying for the certificate, another motive for trying to improve the quality of documentation was to ensure the company's competitive position in the market. Good quality would mean good customer satisfaction and continuing customer relations, another incentive for seeking ways to improve the company's operation. It would have been lulling into a false sense of security to think that the clients would stay loyal if they found another supplier that would be able to better fulfil their needs.

One further motive for starting to develop guidelines for processes in the ETI was a genuine concern about the working methods people had. There had not been a set orientation plan for new employees and each newcomer had been introduced to his or her task by an older employee. Thus any wrong working methods and bad habits were usually passed down to newcomers as common practice. Besides, there was no way of keeping track of employees'

skills because the minimum training, or in fact any training, was not defined. Guidelines, set practices and training were obviously needed.

4.2 The style guide team

After the need for a style guide was recognised in the informal conversations, it was time to convince the management that it was worth both time and money to start to develop such instructions. As the need and the benefits of a style guide were imminent, it did not take long to get he management's blessing, and one member of the management joined to our project team. As, according to Lalla (1988,176), strong management support is essential for a style guide project to succeed, this definitely gave our project a better starting point.

Of course, management has its motivation to support projects aiming to improve the quality of documentation as well. As Caernarven-Smith (1991, 141) points out, it is ultimately the managers who have the responsibility for the quality of every publication that leaves their departments, so they naturally are interested in ensuring good quality in all documentation.

The ETI style guide team consisted of the personnel manager, the department manager of the Information design department, one experienced writer from each of the documentation teams of ETI's two main clients (later referred to as client A and client B), the information designer responsible for illustrations and myself.

The personnel manager approved the team's decisions and provided the management's point of view. The department manager coordinated the style guide project and acted as the chairman in team meetings. The two writers provided the practical information on what the writers' job comprised of, what were the working methods and the key issues or problems the writers stumbled upon in their work like. They also acted as a link to other writers in the company. The writers were selected from different clients' documentation teams to include the possible differences between the documentation and documentation processes. The information designer's responsibility was to instruct the image processing and also the copyright issues.

Being the only one in the team with studies in technical communication, my role was to provide some theoretical background for basis of the style guide. As I had begun in ETI quite recently, I also provided the newcomer's viewpoint and could point out the things that were so clear or self-evident that nobody remembered to mention them during the orientation period.

4.3 Target audience

First of all, we needed to consider our target audience, our colleagues in ETI, to determine how detailed the style guide should be. Could we just compile short reference sheets or would we need to go through the basics of good and efficient technical communication as well?

The majority of employees in ETI have their backgrounds in engineering. There are only a handful of people who have studied technical communication, so it was obvious that we would have to start from the beginning and concentrate on how to write good technical instructions. This was not because we thought that our writers did not know how to write, but because we needed to make them aware of the effects their stylistic choices would have on the instructions. Relying merely on writers' current writing skills would not have been enough to ensure the quality of documentation.

The predominance of technical education on the backgrounds of writers, combined with the wide age distribution, also meant that the employees English skills varied considerably. As almost all content producers and all writers spoke Finnish as their native language, their Finnish skills could be assumed to be at least adequate. While ETI's master language was Finnish, this, however, was not the case with all its clients, which would pose a challenge to those writers whose English writing skills were not so good.

4.4 First meeting: where to start?

In the first team meeting we concentrated on setting the outlines for the style guide and defining the starting point. We brainstormed for ideas on what to include in the style guide and

also how to proceed in the project. As a reference material for the style problems that we would have to tackle we used an online manual that was made in modular form. We also took style problems in printed manuals into account, but as we were quite familiar with them we did not have one present in the meeting. Instead, we relied on our memory and experiences on printed manuals.

At this point all planning was made on a very general level and the issues were based on our own experiences. Each member suggested what he or she thought was important and worth mentioning in the style guide. The ideas were not yet organized very much, they were more like topics in a mind map, loosely connected to the central idea of consistency of the documentation. The main purpose was to gather up something that we could work from.

The writers in our team brought up the problems they had ran into in making the documentation, such as choice of words, presenting information and using images. The comparison between client A's and B's documentation and the way it was produced offered some valuable insigths. There were, as expected, clear differences in the documentation processes and practices. The main difference was that client B's documentation team produced structured documentation, which meant that their documentation was more consistent at least in its structure than client A's documentation. Their processes were also otherwise more regulated.

Not only were there differences between clients, there were clear differences just within client A's documentation and documentation practices. Three subgroups and two subdivisions could be detected even in the context of documentation produced in ETI's Tampere office alone. As client A's documentation was also made at ETI's other offices, it was clear that there would be even more differences to cope with.

The first subgroup included those writers who wrote completely new documentation. The second subgroup included writers who updated old documentation. The third group was formed by the somewhat separate documentation team which was responsible for the documentation of

one specific production unit. In addition to these three groups, the writers working on client A's documentation could be divided into two subdivisions according to the operating environments of the products they were documenting. Yet another difference was that new documentation was mainly produced as structured and modular, while the older documentation was still in linear form. In addition, at least three different programs were used to produce the documentation by different groups, contributing their own special characteristics to the look and feel of the documentation.

As my first task in ETI, I had updated the layout of client A's documentation to correspond to their new brand. This involved going through some twenty years of documentation which gave me a general idea on what the documentation was like and what kind of style or other issues of consistency it had. I had also updated the documentation of two separate production units and thus I was able to see the differences as well as the similarities in their documentation. These experiences helped me to pinpoint concrete examples on the problems the ETI style guide would have to aim to solve.

While brainstorming for the style guide, we felt that we bumped into differences between clients whichever way we turned. All clients might have their own instructions on layouts, images, text, how information was presented and so on. The list seemed to go on and on. Even the master languages might be different. We started to feel rather frustrated as it seemed that every instruction we were to add to the style guide would have to be furnished with a request to check whether clients in question had their own guidelines and follow them first and foremost. We would have to carefully consider how to formulate our, the service provider's, style guide in order to avoid conflicts with clients' style regulations.

All in all, in the light of the examples gathered during our first team meeting, it was clear that the ETI style guide would have to tackle a great deal of diversity between different clients, different documentation teams and different offices. We agreed that we should not try to create

an all-encompassing style guide at once, but instead include the most central things in the first version and update the style guide later on to include more issues as the need would arise.

One important decision was to decide which form or publishing media our style guide would adopt as the primary documentation method or media. As modular documentation and single sourcing are very different from linear documentation, the guidelines designed for linear documentation, such as cross-referencing already mentioned in chapter 2.1, will not result in very high reusability in modular documentation or single sourcing (Ament 2003, 4, 19). Either we would have to select between linear and modular documentation as our main focus or take all differences into account which would result in poor usability and difficulties in locating the relevant information bits among all the exceptions and cases.

As ETI's aim is to emphasize the modular documentation and single sourcing, we decided to take their requirements as the top priority. Most guidelines, although not all, for modular documentation would work well with linear documentation as well (Ament 2003, 9), so the writers could just ignore the guidelines specific to modular documentation and use the rest also when writing linear documentation without this causing any decrease in the usability of documentation, more likely *vice versa*.

Because the documentation was published in both online and print versions, we would have to consider the needs of both media while creating the style guide. With online versions, the requirements for text are more specific, as the information has to make sense without context as well (Ibid.), so we decided to tailor the guidelines for text according to the needs of online publishing. With pictures, however, the printed documentation is more demanding and sets higher requirements on the quality of the pictures than online documentation does. For example, a picture with dpi (dots per inch) of 75 will look good on screen but appear blurry when printed because the computer screen has lower resolution than a printed page (Haramundanis 1998, 166). To achieve pictures usable in both online and print versions, we decided to fit the

guidelines for printed documentation as they would be more than adequate for online versions as well.

As the aim of the project was to create a style guide that the documentation teams would actually use, we decided that before starting to lay down any rules, we should discuss the style matters with the documentation teams. This way the people would get involved in the process which might make it less an unpleasant chore for them to use the style guide. When people agree on the guidelines, they will enforce them (Ament 2003, 22). This would also allow us to see whether or not the writers themselves recognised and were aware of the style issues the documentation had, which in turn would affect our approach to the style guide. Moreover, as the quality is everybody's responsibility like Rupel et al. (1999) conclude, it would be important to involve everyone early on to taking part into improving it.

We decided that we would hold small group sessions with the different documentation teams and go through some examples on the style issues with them using real instructions, both online and printed. The examples were taken from different manuals to avoid labelling any one person. The selected examples were sent to the participating writers in advance so that they would be more prepared to discuss the style issues. Both the writers in our style guide team would go through the examples with their own documentation teams, while the chief illustrator would take care of the illustrators.

4.5 Second meeting: devising an outline

The next meeting proved that the small group sessions with the writers were a good idea. Although we had anticipated that – taking the predominance of engineers among the employees into account – the principles of writing good user instructions might have to be clarified, we were quite surprised on how poorly people were aware of them. The writers seemed at least on some level to recognise whether the text was easy to read and understand or not, but they could not identify the mechanisms in the text that resulted in this feeling.

Besides pointing out issues that would need to be explained in the style guide, the group sessions with the writers were invaluable also because we got a better idea what kinds of style problems the writers actually were facing in writing the documentation. Although we had gone through some issues we ourselves had came across in the documentation, discussing with other writers gave us a wider perspective on the style problems. Writers also made direct requests on instructions on some areas they felt were especially problematic.

I will next introduce the main points of the group meetings with client A's and client B's writers before continuing with the ETI style guide team's second meeting. This will better illustrate the stylistic problems the writers were having and which the style guide should try to solve.

4.5.1 The results of the group meeting with client A's documentation team

At least with client A's documentation team, the writers had required a rather lot of leading when discussing the examples. The problems with the style were not often identified, only the most obvious mistakes, like typing errors, were spotted. This meant that the examples needed to be talked through with the group, trying carefully to poke them in the right direction by addressing tentative questions.

The writers seemed to suffer from the belief that user instructions were always difficult to understand. They seemed to feel that it was a law of nature which one just has to resign to and there is nothing they can do to about it. Even when the example contained a clear style problem, the writers might say it was perfectly good, normal instructional text and that there was nothing wrong with it. For example, the writers did not see the difference between procedure presented as a numbered or a bulleted list. As van der Meij and Gellevij (2004, 9) state, numbered list makes the hierarchy or sequence of the list items visible, while in the bulleted list the lists items appear to be equal, thus making the numbered list the preferred form of presentation for

sequential procedural instructions. For the writers, however, these two ways of presentation were the same.

Generally, the writers felt that the biggest problem in their way of producing good quality documentation was the fact that they could not be certain of the quality of the existing documentation. They knew that the documentation was not thoroughly satisfactory and that there were plenty of things that should be improved, but because of the vast amount of existing documentation, locating and correcting all the flaws in it was simply too big a task. There was simply no time to do it in the course of an ordinary documentation project. The differences between the documentation of the products designed for different operation environments posed their own problems for the writers as well.

On the language and instruction texts themselves, the writers agreed that the use of the passive and active voice would need some regulation. At the moment these were used without further thinking and according to every writer's own preference. Another similar case was the use of the imperative voice. To achieve a unified voice across all documentation, some guidelines were needed.

The biggest differences in the examples used in the group session could be seen in the presentation of procedural instructions. The steps could either be presented as a numbered list or french lines. As already mentioned, the writers did not really see the difference between these two. In addition, the level of detail in the procedures varied. Some instructions offered detailed descriptions of each step, while others might include bare necessities, merely the verb and the object. Another difference between the instructions was how the pictures were referred to. There was no one set practice that all writers would have followed, again it was personal preference that guided them.

The writers acknowledged the need for clear instructions on the presentation of the procedural instructions, but they were sceptic on whether any guidelines would actually work.

Who would determine the end users' level of knowledge and how detailed the instructions should be?

Another issue discussed in the meeting was the use of pictures in the documentation. The type (a line drawing or a photograph), style, quality and size of the pictures varied a great deal without any obvious reason. The writers wanted clear instructions on the size of the pictures, when and how to use photographs, how to number details in the pictures when necessary, to name but a few. They also felt that sometimes the client – or the client's designers – required them to include a picture that had no information value for the user. This would be another situation in which set practices would come in handy: once the matter would be agreed on and the reasoning behind the decision would be on paper, there would be no need to explain it or argue over it again and again (Tarutz 1992, 56). The writers were well aware of the problems with the pictures but they felt that in the current situation the individual writer could do little to improve the quality of pictures.

All in all, the writers agreed that clear and detailed instructions on how to create documentation were needed. These instructions would need to be sanctioned by the client as well, to ensure that there would be no conflicts. On the other hand, style guide alone would not solve the problem, as there was too little time for planning the new documentation and updating or improving the old material used as the basis for it.

4.5.2 The results of the group meeting with client B's documentation team

The style issues discussed in the group meeting with client B's documentation team were not as profound as with client A's. Because all the writers produced structured documentation, the issues that rose in this session were a bit different from those in the other session. This session also had a more decisive feeling: client B's writers actually agreed on and adopted some set practices rather than just discussing them.

The writers agreed that the existing material should be reused as much as possible. Because the documentation was not yet modular, the reuse could not be as extensive and efficient as in modular documentation and single sourcing. It would be merely copy-pasting old material to new documents, but it would still be a step towards more consistent documentation. One example on this kind of reuse that the writers came up with were warning texts which should be copied on existing documents if possible rather than rewriting them. Another agreement was that if something completely new have to be written, existing material should be used as a reference to ensure the consistency of the documentation.

Pictures rose to a fairly central position in this group's discussion. The writers did not want to create strict roles for writers and illustrators where writers would only write and illustrators would take care of the pictures. The writers felt that the strict roles would make their jobs less rewarding. In addition they felt that if the person who wrote the text would create the images as well, it would better ensure the control over the whole.

As with the writers from client A's documentation team, client B's writers also agreed on the need to come up with clear and consistent instructions on image processing. However, they were of the opinion that even a picture with less information value or of lower quality was better than no picture at all. The writers felt that even though instructions might work without pictures, they were still more pleasant to read and easier to understand if even one picture was included. This view is in accordance with studies which show that users perform better when they follow instructions that utilize both pictures and text than mere text, as the instructions are easier to understand and the cognitive model for the task at hand is easier to construct when pictures are included (Ganier 2004, 21).

One additional point about pictures that came up in the meeting was that writers felt he need to separate the references to parts of a picture from the steps of the procedure. The numeric reference to different parts in the picture should be replaced by alphabetic reference and that the

numbers should be reserved purely for referring to the steps. However, they acknowledged the problems that having several separate pictures on the same page might pose as well as the possible limitations for this practice that the editing programs used might cause.

* * *

Now that the style guide's background has been examined, let us return to its creation. After we had gone through what the writers had had to say, we created a short outline on what were the key issues we wanted to include in the first version of the style guide. They were:

- using and processing pictures
- organising information
- writing body text
- writing procedures
- using headings
- using tables and lists
- creating the table of contents
- reviewing the instructions
- getting feedback

We did not include a separate chapter on correct and incorrect usage of words or terms as such. Some points on usage naturally came up with other guidelines, like using abbreviations and acronyms and using terms consistently, but we did not include any lists on correct or incorrect words. This was mainly because terminology, for example, is rather client-specific and thus better suited for clients' own style guides than service provider's. Had the usage of terms been included in the ETI style guide, the advise to check the client's own instructions would have had to be included on every instance and so it would have been work gone to waste, reducing the usability of the ETI style guide as well. However, after the first version was

finished, few cases of usage have come up that may need to be included in later versions of the style guide.

The instructions on pictures were naturally our information designer's responsibility. The rest of the things on our list were divided into sections according to their estimated workload. These were then divided among both the writers and me. We agreed that we would have drafts for the first version of the style guide finished by our next meeting.

4.6 Third meeting: reviewing the style guide topics

For the third meeting, each of the team members produced the first drafts of their assigned style guide topics. The topics were written independently and then reviewed together in the meeting.

Because we had to take the possible client-specific style regulations into account, we had to stay in a very general level when writing the style guide topics. Adding too many details into topics would have increased the risk of conflicts with clients' regulations. Recurring conflicts with clients' style guide would have rendered the ETI style guide useless and thus not worth creating, so aiming for a neutral style guide really made sense.

We based the first version of the ETI style guide to the European standard 62079:2001 *Preparation of instructions –Structuring, content and presentation* (2001), which laid a foundation for harmonising documentation with the standard later on. As other reference material we used SFS-käsikirja 174-1:2006 *Tekninen dokumentointi. Osa 1: Informaation jäsentely, dokumenttien luokittelu ja dokumenttien hallinta* (2006), a handbook published by The Finnish Standards Association, and *Käyttöohje on osa tuotetta: Käyttöohjeen laatijan opas* (1991), published by insurance company Pohjola. These gave very general guidelines on style but that suited our purposes well, as we did not need detailed, all-encompassing guidelines. In addition to the reference material, we mainly relied on our existing knowledge on what good technical documentation should be like and to our common sense. For the first version of the

style guide we did not use any existing style guides, such as *Microsoft Manual of Style for Technical Publications* or *The Chicago Manual of Style* as reference material. First of all, these were quite thorough in their guidelines, much more detailed than we needed. Second, as ETI's master language was Finnish, the style guides in English would only be useful so far. We did not feel that using extensive amount of reference material was necessary for the scope of the first version of the ETI style guide, but in future revisions additional source material might be needed.

The style guide was made in modular form and for online publishing. This offered us the possibility to actually test the guidelines we were writing in practice. As the topics were written as independent modules, the workload was easy to distribute evenly among our project team. Because we were creating the style guide like the writers would create documentation, we immediately saw what would not work and which additional things would need to be included in the instructions. Besides, not using the documentation method the guidelines were made for would have seemed rather inappropriate. As Tarutz (1992, 203) says, style guide must follow its own rules.

The third meeting was straightforward: each of us introduced their topics to the rest of the project team. As we went through the topics, we commented on how to improve them: what to add, what to leave out and what to formulate differently. We also tried to make sure that our style guide itself conformed to the guidelines it was imposing on writing documentation and that no flagrant errors, be they stylistic or linguistic, remained in the style guide to undermine its authority.

After all the topics had been discussed and all the necessary corrections written down, we decided the date of publishing. As the style guide would be available online for all the people at ETI, there was no need to make a printed version of it. We decided to introduce the style guide to ETI's Tampere office in the next monthly meeting. We would make a slide show on the

purpose and main points of the style guide to distribute the same information to other ETI offices. This way we could effectively inform all the employees in ETI on the style guide. In addition, the introduction to the style guide would in the future be part of every new employee's orientation.

We also encouraged people to give us feedback and comment on the style guide. As already mentioned, we wanted to create a style guide that would be used. To offer an opportunity for people to give feedback and suggest improvements would not only result in a better style guide, it would also make people more committed to the style guide as they would notice that they were listened to (Tarutz 1992, 204).

4.7 Conclusion on creating a service provider's style guide

When creating a service provider's style guide, the main problem is taking clients' own style regulations into account. This is especially the case if the service provider has many clients. If the service provider has only one client, there is no problem: the service provider can use client's style guide, if one exist, as its own style guide. Even if the style guide has to be created, there are only one client's style regulations to be considered. If, however, the service provider has several clients, as with ETI, the style guide has to tackle a great deal of diversity. The solution to this is either to tag all the guidelines with "Please see the client's guidelines", to include every possible exception in the style guide or to keep the service provider's style guide on a very general level to avoid the conflicts altogether. The last option seems to be the most usable solution, although the resulting style guide may not cover all possible style problems. One solution to this might be to compensate the brevity of the service provider's style guide by gathering client-related style issues and creating smaller style sheets, if the clients are not interested in having a full-fledged style guide of their own.

It pays to listen to writers and other people who make documentation. They know their work and the problems they face best. They are also the best people to point out any guidelines

in the service provider's style guide conflicting with clients' regulations. This is important as it is quite impossible to otherwise handle or be aware of every client's requirements or documentation. More important, the writers are the users of the style guide and user satisfaction is as crucial for a style guide as for any documentation. If users are frustrated with their manual, they will toss it aside and complete their work by instinct, with often less than perfect results (Alred et al. 1992, 53). The case is no different with writers and the style guide. If the style guide does not save writers's time they wont use it and if the writers do not use the style guide, there is no point investing time and effort into creating one (Tarutz 1992, 206). By involving the writers in the creation of style guide and by listening to their feedback, the writers can be committed to the style guide.

I have now analysed the creation process of a service provider's style guide. I will next move on to the other end of the scale and go through the creation of a client's style guide, the SMC HRM style guide.

5. Creating the SMC style guide

In this chapter I will describe the creation of a client's style guide, using the case study of the SMC HRM style guide as an example. It is worth noticing, however, that unlike with the creation of the ETI style guide, I will not cover the whole process from the beginning of the project to the completed style guide. Instead, I will concentrate on the initial planning of the style guide. The main reasons for this are, on one hand, the scale of the project, which would be too much to be fully covered in a Master's thesis for both duration and scope, and, on the other hand, the wish to avoid any problems with confidentiality.

5.1 The SMC HRM project

At the end of the year 2007, the SMC HRM project was launched at the customer's commission. The project was done as a close collaboration between ETI's Tampere office and SMC HRM. The project also involved the SMC HRM production units in France, Canada and Finland, making it a truly global project with many participants.

The SMC HRM project was not created in isolation from other SMC documentation projects. It was a part of a much larger on-going process of transferring the SMC documentation from linear documentation to modular documentation and single sourcing. Although single sourcing was already used in some SMC documentation, this was the start of making it the norm of documentation in the whole of SMC. In future, all of the SMC's documentation would be assembled from reusable modules, as the older, linear documentation would be converted to modular form.

The aim of the SMC HRM project was to harmonise the documentation in different SMC HRM production units. The goal was to create a unified documentation process and high-quality instructions which would enable the production of fully reusable modules regardless of the content producer or the production unit. As already mentioned, the whole of the documentation

process and the content itself should be geared to maximum consistency to ensure the success of single sourcing (Perlin 2002, 34).

The SMC HRM project consisted of several subprojects. The existing documentation would have to be evaluated and chunked into modules. The structure of documents and modules would have to be decided. The processes and tools would have to be harmonised and cooperation between the different production units increased. Harmonising was also necessary for the information content as well, and to achieve this the creation of style guide and term bank were also on the agenda of the project.

Some previous work on the term bank had already been done at SMC's Swedish branch, so to avoid duplicate work the creation of the term bank was left out of the SMC HRM project. However, no previous work on the style guide existed. Because the writers in ETI had more expertise in the theory of technical writing, the creation of style guide fell quite naturally to ETI's responsibility. Besides, ETI had already created a style guide of its own – albeit a rather general one – that could be modified to answer the specific needs of SMC documentation. In addition to providing a foundation on which to build, the ETI style guide had also offered an opportunity to get hands-on experience on style guide creation.

The department of Information design at ETI's Tampere office had the main responsibility of the project. Designing and testing the implementation of single sourcing and modular documentation to the needs of SMC were the areas that needed most people. The creation of the style guide, on the other hand, did not directly involve more than two people, one to coordinate the style guide creation with the rest of the SMC HRM project and one to actually produce the style guide. However, we did not see this as a problem as the aim was from the beginning to produce a style guide that could be augmented and updated as needed.

As I had expressed my interest in planning the style guide and also its suitability as a topic for my Master's thesis, I was entrusted with the actual writing of the style guide. The reason

why I did not take care of the coordination of the style creation as well was that I had my hands otherwise full and did not feel that I could dedicate my time as much as required to single-handedly manage the whole project. Another reason was that as I was a rather recent addition to ETI's work force, a more experienced writer was assigned to my support in the project.

At first the style guide was planned to encompass only the SMC HRM project. However, already from the beginning the possibility of expanding the style guide to cover the whole SMC lurked at the background. As the SMC HRM project progressed in the spring 2008, the benefits of single sourcing for the SMC documentation became imminent. The project ceased to be just a project. Instead it escalated into a new practice to be applied in all SMC documentation. Although the pilot work was still done with the SMC HRM production units originally included in the SMC HRM project, all the implementations had to be designed with the whole SMC in mind. All this was also true for the style guide, which scope was suddenly extended enormously.

The change in the scope of the SMC HRM project was not the only change that affected making the style guide. The deadline for the finished style guide fluctuated a great deal in the course of the project. First there was no clear deadline and the only schedule for the style guide was that a plan for developing it would be ready in May 2008 and the first version in the autumn 2008. This was a realistic plan taking the resources into account.

However, as the SMC HRM project had so many different subprojects, they were bound to affect each other. Suddenly, the deadline for the complete style guide jumped forward to the end of May 2008, the original deadline of the style guide plan, as another subproject needed some guidelines for the documentation. This might have been manageable if the contents of the first version were limited, had not the deadline brought forward again, this time to mid-May. At this point it was clear that the SMC style guide would not be completed in time. Luckily the ETI style guide was suitable for providing the guidelines needed in the other subproject, and the SMC style guide did not have to be unnecessarily rushed.

Besides the schedule, the style guide team itself changed in the course of the project. The team began with two people, but as the deadline for style guide was brought forward, the need for more writers became urgent. However, the deadline for style guide was once again pushed back, no new writers were yet needed and thus not introduced in style guide project. One further change was still to come. The coordinator left the project as a result of promotion, and the style guide team was reduced to one person. Fortunately as a consequence of this the schedule of the style guide project was again re-evaluated to correspond to the available resources, but more people for the writing phase may still be needed.

5.2 The planning phase

As Mackay (1997) states, the first thing a style guide developer needs to consider is whether the project is worth the effort. Will the benefits of the style guide outnumber its costs? Is the project realistic, does it have a chance to succeed? Will the project have enough support, especially from the management, so that the style guide can be successfully established? Another set of questions is presented by Tarutz (1998, 186): Do you have a lot of recurring style issues? Do you want your documentation to have the same look and feel throughout? Do you want your documentation to appear as though one person wrote it? One further question from Ament (2003, 22) could well be added: Do you want to achieve successful single sourcing? In the case of the SMC HRM style guide, the answer to all these questions was yes.

Further reasons for creating a style was the fact that SMC is a global corporation. Managing global cooperation and documentation produced in several units far from each other brings new challenges to be solved. O'Neill (2002) lists several problematic areas in global cooperation:

- Information is not neutral (for example, different product and company names appear across documentation)
- Differences in the use of terminology between companies or units

- Documentation from different companies or units has different (brand) layouts
- Difficulties in localisation (e.g. translated text does not fit in the are reserved for it, texts in graphics)
- Different ways of writing the same information
- Different tools used in documentation

All of the problems O'Neill's lists were present in the SMC HRM cooperation. Different tools and even documentation methods were used, terminology was not constantly used and the localisation problems surfaced regularly. As the different units had been acquired by purchasing, they had their own company histories and products that were visible in their documentation. Fortunately, this last problem was being solved. Already in the spring 2007, there had been a massive brand update for SMC documentation made at ETI's offices in Turku and Tampere, as well as in Sweden. A shared brand layout had been given to all documentation, different company names and logos were replaced by one name and one logo, and the names of the products had also been standardised. This brand project was now continued in the context of the SMC HRM project. The problems O'Neill presents were also among the goals of the SMC HRM project in a global scale, but they were not for the style guide alone to solve. The other subprojects would contribute as well.

5.2.1 Gathering background information

Before I could start setting any guidelines I needed some background information on the participating production units. What kind of documentation did they produce? Where they using linear, structured or modular documentation? What tools were they using? How was their documentation process like? How many people were there making the documentation? What was their background like? Did they already have some kind of a style guide?

The HRM production units in Canada and France were rather a mystery to us all in the SMC HRM project. We had had no previous cooperation with them and their documentation

was created quite separately from the other production units. All we did know of their documentation was that they used English as their master language, but it was unclear, for example, whether the documentation was produced straight in English or translated later was unclear. Achieving a better understanding of their work, then, would be vital in order to ensure that the style guide would suit them as well.

To get the basic information from the SMC HRM production units in France and Canada we sent them a short query on their documentation and documentation process. As we did have enough information on the Finnish production units, we did not include them as receivers. The e-mail contained following questions:

- What type of documentation (linear, modular, structured) was produced in the documentation department?
- In what language was documentation produced?
- How many people were there on the documentation department?
- Which tools (applications) were used in the everyday documentation work?
- Does the documentation department have any local style guide or term bank at their disposal?

We also welcomed any further information on their documentation and the process.

One question that might have been good to include in the query was what background did the people in the documentation department have. Were they all engineers? Was there someone with some training in technical communication? These questions did not come out clearly from our query but they would have been useful in determining the style guide's target audience and their level of knowledge.

Documentation in the HRM production units in Finland

For the part of the production units in Finland the answers to these questions were easy to come by. All of the SMC documentation in Finland had been outsourced to a single service

provider, ETI. I myself was a part of the documentation team in Tampere. I knew that the documentation was almost exclusively produced in Finnish and then translated as the needed. I also knew that the majority of the documentation was still in linear form but that all new documentation would be made modular for single sourcing. The documentation was made both for print and online publishing.

I was also familiar with the tools used in the documentation. The texts were mainly produced with Interleaf Quicksilver, Adobe Framemaker 7 or some XML editor. Image processing was done with either Adobe Illustrator or Adobe Photoshop. Beside tools, I also had some idea what the documentation process itself was like, although there was some variation, as already mentioned in the chapter 4.4. As for style guides, we had, of course, the ETI style guide, and at the ETI's Tampere office we also had *The Chicago Manual of Style* and *Microsoft Manual of Style for Technical Publications* at our disposal. The documentation team at ETI's Turku office had at least the ETI style guide.

The documentation teams at ETI's office were quite large, comprising tens of people at the Tampere office alone. As I established in the chapter 4.3, the majority of the people had a technical background, but there were some people with training in technical communication as well.

Documentation in the HRM production unit in France

The answers to our e-mail query from France came back quickly. There were five people in the documentation department, so it was rather small, and actually a part of the engineering department. The documentation they produced was linear, and it was produced straight in English with FrameMaker 7. For image processing they used Corel Draw 9. The graphic layout for the documents was defined in templates that were used when creating new documents. The documentation was, again made both for print and online publishing.

Some technical data for documentation was retrieved from a server common with other production units, including the Finnish ones, which resulted in shared terminology. In fact, there was a dictionary shared by the production units in Finland and France, although the writers did not know its exact location on the server. In theory, the French team would get the terminology they needed from there just by copying, without any modification. In practice, however, sometimes the documentation team had to modify the existing terms or to create new terms if they did not find the existing terms fitting. All in all, there was some correspondence in the terminology between the Finnish and French production units, but it was not absolute. As for their own documentation, the French team tried to use the same terminology throughout the whole set, so it should have relatively high internal consistency.

Documentation in the HRM production unit in Canada

If the French documentation team was quick to answer, the documentation team in Canada was not. When we reminded them on the importance of their answers for our project, they were surprisingly reserved in their response. They first wanted to know why we needed the information we were asking for and how we would be using it. They doubted their documentation processes would be too customer-focused for the information to be useful to us.

It took us some time to figure out what was hindering our communication with the Canadian documentation team. At the European end, the SMC HRM project was well known in all the SMC HRM production units. Across the ocean, however, the documentation team was unfamiliar with the project. They had heard that some sort of standardisation campaign was going on, but they had not received any further details on it. Even the name of the project was news to them. Furthermore, they did not know how ETI was connected to SMC. They obviously were wary when a previously unknown company started asking them questions about their documentation and documentation process. They obviously knew as little about us as we did about them. As we had assumed that they, too, had been informed about the SMC HRM project

as well as we were, we had not included enough information on the project in our e-mail query. Luckily, with some explaining, we managed to sort out the misunderstandings and establish cooperation with the Canadian documentation team as well.

The Canadian documentation team included only two people, making it the smallest of all the documentation teams participating in the SMC HRM project. Yet, they could well be considered as the most advanced documentation team, as the SMC documentation processes in ETI were so varied. The documentation at the Canadian HRM production unit was made using structured and, to some extend, modular documentation. It had been designed with the eventual goal of converting it to XML and publishing it mainly online in mind. The documentation was tagged and structured according to the type of section and information content. The modularity of the Canadian documentation was not quite on the level the SMC HRM project was seeking to achieve, but it was a good start. The Canadian team also reused some larger modules, although their reuse may not have been as systematic as Ament's (2003, 3–22) view on single sourcing involves; for example, they used same safety instructions chapter for all manuals, but every manual was produced book-by-book basis as there were changes in the design from product to product.They felt that for the documentation to be useful for the end users, it could not be made fully structured, and they were interested in hearing what sort of solution we might have for this.

For tools the Canadian team used structured FrameMaker 7 for the text and Corel Graphics Suite for image processing. They did not have any written style guide, but for consistency's sake they agreed upon style and terminology which were then systematically applied to all documentation.

* * *

The standardisation of documentation brought up the question on the master language in SMC HRM documentation. In early spring 2008 a decision was made to adopt American English as the master language in international communications. However, there was some leeway to this rule as UK companies were allowed to use British English in their internal communications. From the SMC HRM style guide's point of view this meant that some rules on the usage should be included to ensure that all texts would follow the American conventions (e.g. -ize instead of -ise, -ter instead of -tre etc.). At the same time, a few other details, such as how to mark dates, were also decided, all of which would also be included in the style guide.

After we had gathered some background information for determining the initial situation we were able to form a general view on the task at hand. The next task was to determine what would be needed from the style guide

5.2.2 Deciding the course of action: how to adopt a style guide?

Lalla (1988, 176) analyses in detail whether a corporation should adopt a generic style guide, like *The Chicago Manual of Style,* create a house style guide of its own, or combine these two options. There is no one solution to this question, as the best option depends on each case. The most important things to consider are the needs of the corporation and how much support can be expected from the management. After the style guide developer has conducted a preliminary analysis on the needs and knows how committed the management is, he or she can decide which strategy to adopt.

According to Lalla (1988, 177) if management support is minimal, a generic style guide is a good option. This is also the case if a generic guide that satisfies the corporation's needs exists. If this approach is the most suitable, then all there is to do is to review various existing style guides and choosing one that seems to fit well with the organization's needs. Yet, as Hart (2000) says, it is unlikely that any generic style guide will cover all the topics a corporation needs to cover.

Lalla (1988, 177–178) reminds that if adopting a generic style is rather straightforward, creating a house style guide requires much more. As the house style guide focuses on problems specific to the corporation, it often involves creating guidelines from scratch, making this option quite work intensive and time consuming. The third option may be the most painless and effective choice. For the general style issues the company can use a generic style guide but develop a house style guide to supplement the generic style guide on those issues unique to the corporation and out of the generic style guide's scope. Hart (2000) sums this up well: "Now that you've picked a good [generic] guide, you can ignore all the issues it covers and focus on those that it doesn't cover". The benefit of this last approach is that time and work will be saved in creating the style guide, but on the other hand, it may have its toll on the usability of the style guide as the content producers get frustrated in having to consult two style guides.

How do Lalla's arguments apply to the case of SMC HRM style guide? As the field of SMC lies in heavy machinery, it is quite difficult to find a generic style guide to fulfil its documentation's needs, since so many of the existing style guides seem to be geared towards software documentation. They thus fail to cater for the special needs of SMC documentation. On the other hand, as unique style issues in SMC documentation are concentrated on a quite specific area, there is no need to start from the scratch. In the context of SMC documentation, then, Lalla's third option seems to be the most suitable: to settle for a generic style for issues like how dates should be expressed and to deal with the more problematic issues in a house style guide. Taking also the restricted resources available for developing the SMC HRM style guide into account this seems to be the most reasonable option.

Deciding to use some generic style guide as a reference material for the SMC HRM style guide meant that the question of which style guide to choose as the reference work actualised. Mulford (2003) deals with this question in her article. According to her, there are four important points to consider: type of publications, target audience, the users of the style guide itself and

finally, personal preference. Although I will not try to establish the reference style guide here, Mulford's criteria are worth pondering.

First, the SMC documentation consisted mainly of user manuals, so in this respect the material was rather uniform. The reference style guide should then be geared towards publishing user instructions rather than, for example, newspaper articles. If the need would arise, other types of publication could be later included. Second, as the SMC HRM products needed specialized training form the part of the end user, the users could be assumed to have a certain level of prior knowledge on the workings of the product instead of being absolute beginners. Third, as the users of the style guides would most likely be mainly engineers turned to technical writers, it would probably be better if the style guide would not be too theoretical. The questions on personal preference would be a bit trickier as it would be difficult for one person to impose a personal preference over the different documentation teams. As there is no single editor or even a board of editors, there are not personal preferences authoritative enough to override all the others.

One additional point to consider when selecting a generic style guide as a reference work would be its effect on the company image. What sort of image would a company portray to its customers with its selection of reference style guides? In my opinion, a company would convey a different picture if it used *The Chicago Manual of Style* as the reference style guide compared to using *The Microsoft Manual of Style for Technical Publications*. The former might present the company as to be more academic, as it is the style guide of the university of Chicago, while the latter might create a more business orientated image. In addition, being published by a software company, *The Microsoft Manual of Style for Technical Publications* would clearly relate the company to software documentation.

Sometimes, as Mulford (2003) says, it may be useful to have more than one reference style guide. This might be the case is the company produces different types of publications. If

the company has more than one reference style guide, it is necessary to decide the hierarchy between them. What is the primary style guide in which situation? This is especially important if the style guides contradict each other in their advice. Naturally, if the company has a house style guide of its own, it will override any reference style guides, but if the it does not answer a particular question, having decided the hierarchy between the reference style guides will ensure the consistency in decisions.

5.2.3 Deciding the contents: what to include and what to leave out?

The SMC HRM style guide should provide guidelines to enable successful implementation of single sourcing. In the light of the background information gathered, some things seemed to be quite straightforward while others would need more consideration in order to find the best solution. The key would be to provide guidelines that would make the content as consistent as possible.

One important aspect of consistency that in the light of current documentation needed strengthening was the use of parallel structures, in other words formulating elements with the same function in same way. One clear example of this could be the practice of starting all steps of the procedures with an imperative. According to Ament (2003, 158), using parallel structures in same elements shows that they share a common idea. With procedure steps this common idea would be describing a user action.

David K. Farkas (1999, 45) provides the background for Ament's comment as he discusses the benefits of using parallel structures from a perspective of cognitive psychology. He states that, especially with procedural instructions, the consistent design makes it possible for the user to make assumptions on a procedure based on the format of the steps simply by skimming through them. These assumptions make it possible for the user to built a mental model on how to proceed in a task with less effort. As the user returns to the steps, this model is proved correct, saving the user from the cognitive load of unnecessary problem solving.

Although Farkas discusses only procedural instructions, the benefits can be applied to consistency in documentation as a whole. Using parallel constructions would thus make the SMC HRM documentation easier for the user to understand.

The target audience – the content providers – was rather homogenous: technical background, non-native speaker of English, no training in technical communication seemed to be the dominating characteristics. As with the ETI style guide, meant that including basic information on how to effectively communicate technical information would be needed. As the majority of the writers were non-native speakers of English and their language skills varied a great deal, including something on grammar and other English basics had to be considered. However, I agree with Tarutz (1998, 192) when she criticises this sort of approach as being too patronising and down-right insulting. Besides, as Tarutz also points out, a style guide cannot compensate for the lack of writing skills, so some other measures would be necessary anyway, making cramming in information like grammar unnecessary.

In creating the ETI style guide, we had also included some process information, such as reviewing, in the style guide. This time, however, all process information was reserved for the process guide and thus left completely out of the style guide. At first, though, this was not quite so clear-cut: topics such as reviewing, standards and use of tools had been initially marked under the style guide development in the project plan for the SMC HRM project. I included them in the first draft on the style guide contents but I left them out after the first review of the plan for the style guide.

I also decided to include as little on the format as possible for two reasons, although layout and formatting are often the most discussed topics in a style guide (Mackay 1997). First, as the guide is aimed for single sourcing which, as already mentioned, separates content from format, it would be almost ridiculous to include design information in the style guide. The other reason was that templates, style sheets and formats were developed under a different project, and to

include them would have meant a great deal more coordinating with the increased risk that misinformation ending up in the style guide if some update in format information would be forgotten.

The decision to employ a reference style guide raises the questions on how detailed the house style guide should be. As Weber (2007) states, this can vary from a single page list on places the house style differs from the reference style guide to a detailed account of all style issues spanning hundreds of pages. With the SMC HRM style guide, Weber's suggestion on summarising the most relevant points in the house style guide as well seems like a good solution, as a smaller guide is more likely to be used than a huge tome, which many reference style guides tend to be. Taking the dominance of engineering backgrounds among SMC HRM documentation teams into account, another positive side would be providing the most important information on good technical writing concisely in one place where it could be found easily. In other words, the SMC HRM style guide would probably serve its purpose best if it acted also as a brief handbook on technical writing, providing the basic theory in concise form as well as the guidelines on purely stylistic matters.

Closely related to the level of detail in house style guide is the question of including user – or in this case writer – motivation. As Reep (1997, 209) says, including the reason for acting in a certain way in the instructions may improve the performance. Instructions on style are no different in this respect; understanding theory behind practice will make it easier to see the benefits achieved by following the instructions. Tarutz (1998, 198) actually recommends including the reasons for decisions in the style guide, but warns not to make them lengthy. In my opinion, including writer motivation in the SMC HRM style guide would make it understandable and reasonable for the writers to follow the guidelines, which in turn would make enforcing the style guide easier as a whole.

Weber (2007), however, takes a different stand on including motivational information in style instructions. She recommends including only as much information as necessary in the style guide and to leave out the rationale for the guideline decisions; “The less that writers have to read and remember, the more likely they will read and remember the important points.” As one solution she offers including the rationale in another document or at least separating them from guidelines, but in my opinion this might have a detrimental effect on the usability of the style guide. As already mentioned, having to consult several documents would make it harder to use the style guide, perhaps to the point that the writers would actually cease to use it at all.

One problematic topic that was suggested to be included in the style guide was DITA and its effects on writing documentation. The first problem with DITA is that it is a complex concept that is hard to explain in concise form. The second problem is whether information on DITA belong to the style guide or to the process guide. Because, as Day et al. (2005) state, DITA separates different information types into their own modules, it does affect organising information, which would be a topic to be included in the style guide. Yet it is quite difficult to draw the line between process and stylistic information, as in the context of SMC HRM documentation, DITA is closely related to the processes of structured documentation, which strictly belong to the process guide. This might cause some problems in defining what goes into the process guide and what into the style guide. Most probably DITA cannot be completely ignored in the style guide, but describing it in any further detail than absolutely unavoidable will be reserved for the process guide. One possible solution could be making all theory on DITA only as a cross-reference to the process guide in the style guide.

5.2.4 Deciding the preliminary structure

To give me a better idea on how to proceed in the style guide creation and how the issues would relate to each other, I needed a draft on the structure of the style guide. I started by listing important issues that I felt should be included, and as the list grew I started to combine the issues

into chapters. Finally, I had a preliminary sketch on the style guide. This sketch will of course change many times as I progress with the style guide, but it gives me something to work from and also something concrete to present in reviews.

First of all, as with any manual, there will be a short introduction to the style guide and its function. This gives the writers a general idea on the purpose, benefits and importance of the style guide. This is also a good place to welcome any feedback on the style guide and perhaps to shortly describe the decision making process, reviewing schedules and such general matters. An introduction will also include information on the reference style guides.

After the introduction chapter the natural way to proceed is to state the master language used in documentation, in this case American English. When the information on master language is right in the beginning of the style guide, it will also be easily retrievable for publications other than manuals, such as memos and reports that would use the same master language but not perhaps require the guidelines especially targeted for manuals, such as how to organise information or write procedural instructions. Although there will be quite little information on correct or incorrect usage in the first version of the style guide, some practices set by the choice of master language, such as spelling and writing dates, fall conveniently into this chapter as well. Guidelines for internationalised language will also be included here.

Before moving to guidelines on writing style, it is wise to say something about organising information. This chapter will contain the more “mechanic” information on using headings and subheadings, lists, tables, warnings, cautions and notes. Guideline topics include, for example, presenting information in the order the user needs it, presenting information already known before new information, where to use warning and cautions, numbering the headings, the number of allowed levels of headings, and using lists, especially when to use numbered steps and when bulleted lists. If DITA will be included in the style guide, this will probably be the most suitable chapter for it.

After the usage of the structural elements in the text, it is logical to move on to the style of writing and how the documentation should "sound" like. In my opinion, this kind of proceeding supports the idea of separating the content from the format, the prevalent idea of single sourcing and modular documentation which the SMC HRM style guide should support. The organisation of the information can be seen as corresponding to the content, whereas the stylistic choices in writing correspond to the format, "the look and feel". As the guidelines relating to these areas are separated under different chapter in the style guide, the information may be easier to locate when it is needed. Of course, unlike the visual format of the documentation, such as paragraph and page layouts, the writing style is applied to text while writing it and not merely in some later phase.

As for the guidelines that this chapter includes, they are those most commonly found in style guides: clear and concise sentence structures, use of active voice, present tense and imperative, spelling out abbreviations, notes on punctuation as it differs from the general usage, using parallel constructions as much as possible. This chapter will most probably be the longest in the style guide and form its core matter.

The SMC HRM style guide will also include a chapter on the use and style of the images. However, this chapter faces the same problems as with DITA, mainly the difficulty of deciding what goes to style guide and what to the process guide. Image processing, as the name tells, falls under the process guide. Yet, what benefits using images has, how do they relate to text and interact with it, and how they should be used fit well in the style guide. This section needs careful consideration and close cooperation with the project responsible for developing the process guide. For the time being, it may be wise to keep the chapter on images included in the style guide, but to be prepared to move it perhaps completely to the process guide.

I have now sketched one way of organising topics in a style guide. Logical organisation of information to suit the needs of documentation is vital to ensure good usability. As Alred et

al. (1992, 105) put it, organisation is about unfolding the subject to the readers in such a way that it will be easy to understand. My sketch for organising the contents of the SMC HRM style guide confirms Alred et al.'s statement that different methods of organising information are usually combined. Here, the contents have been organised from general to specific (from the general language choice to sentence structure), in chronological order (from organising the information to writing it) and also according to the topic. Another option could be to organise the subjects alphabetically, but in my opinion, this would not function as well, as the information would be more fractional and would probably require much more cross-referencing between related topics. According to Haramundanis (1998, 37), another reason why logical organisation of information is important is that it may be a great help in locating the correct information when needed, thus improving also the usability of the document. The alphabetical organisation would probably not result in as good outcome in this respect.

The next phase in the style guide project will be proceeding to the actual writing of the style guide as well as reviewing the drafts with all participating SMC HRM documentation departments. As the SMC HRM project is still in progress, it is not possible to provide a similar conclusion on creating a client's style guide as it was on creating a service provider's style guide. However, I will next take a closer look on the problems that we have had so far so as to list at least some lessons learned.

5.3 Problems in the planning of the SMC HRM style guide

The main problem throughout the SMC HRM style guide project has been the lack of time. Because my main responsibility at work lies outside the SMC HRM project, finding enough time to fully concentrate on developing the style guide has been very difficult. With a project like this, it would be important to be able to set other responsibilities aside. Another problem has been the ever-increasing scope of the whole SMC HRM project. This has, of course, brought more work with it, thus making it even harder to find enough time for it. As the

project was extended to cover the entire SMC in the future, there are more and more details that need to be considered when planning the style guide.

The increase in scope of the project also means increase in responsibility, which, I have to admit, is a bit frightening. Luckily, however, the style guide does not have to be perfect on the first go, as it can be augmented in later versions to better cater for the needs that arise as the documentation of SMC HRM is transferred to single sourcing and modular documentation. The creation of a evolving style guide has been the idea right from the beginning, but a challenge that remains in this respect is establishing who will be responsible for reviewing the style guide in the future and what will be the schedule for the reviews as well.

The nature of the SMC HRM project as a global project has had its challenges. Keeping everybody informed has probably been the most notable of them. As could be seen from the initial e-mail correspondence with the Canadian documentation team, just because participants on one continent are well aware of the project does not mean that the participants on another would be as well. We should have included more information on the style guide project in our first e-mail, but fortunately we managed to sort out all the things that were unclear in the beginning without it affecting the project. The challenges and problems which the writing and reviewing phase of the style guide project brings remains yet to be seen.

6. In conclusion

Style guides are invaluable tools for companies to increase consistency in their documentation. Having a style guide that records all style decisions enables the company to maintain a unified look and feel throughout its whole documentation. This in turn will help to promote a professional image and improve the quality of documentation.

As the new methods of documentation gain more and more ground, the importance of the style guide is further highlighted. In order to be successful and the company to gain full benefit on the new technologies, single sourcing and modular documentation will demand higher degree of consistency in documentation. As the documentation is created from small independent pieces by reusing the modules rather than creating them as one big file as in linear documentation, it is vital that everybody uses the same stylistic conventions for modules to form a unified whole.

I have examined the process of creating a style guide for a service provider and for a client through two case studies, the ETI style guide and the SMC HRM style guide. As projects, developing a service provider's and a client's style guide have both similarities and differences. They both need careful planning and assessing the company's needs, involving the content producers in the creation process and later in the reviews, strong support from the management and enthusiastic project team. The figure below will illustrate the main phases in the style guide development according to these case studies:

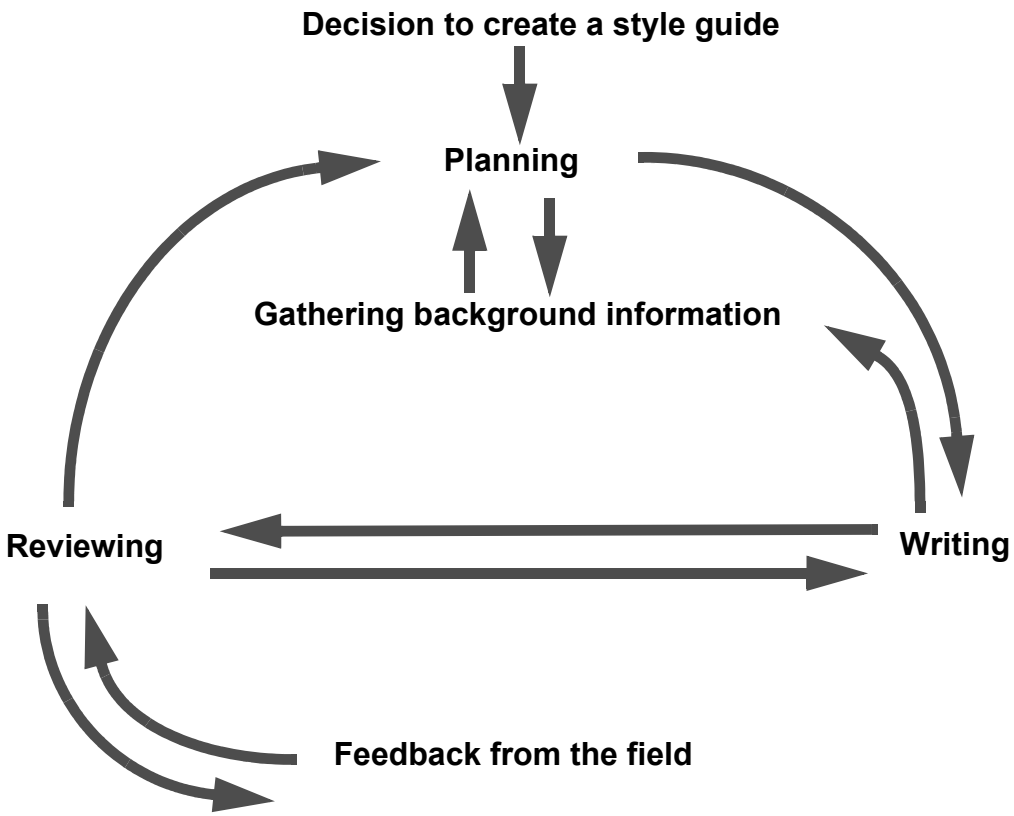

Figure 1: The process of style guide development

As can be seen from the figure, making a style guide is a cyclical process. It has a natural start in the decision to create a style guide. From there, the process will move to general planning on how to proceed and, in case there is a project team, with a preliminary distribution of tasks. Then the process moves on to gathering the required background information. At this point it would be useful to involve the target audience in the creation process as well. As the required background information is accumulated, the planning can proceed further which in turn may create need for additional information, thus altering the process between these two phases as long as required.

When there is enough information and a preliminary plan for the style guide, the process can move on to the next phase, the actual writing of the style guide. Again, as the writing proceeds, new information needs may surface, shifting the process once again to gathering information and changing or honing the plan based on the new information. After the draft for

style guide – the whole guide or just individual topics – is ready, the draft is reviewed. Again, reviewing should not be the style guide team's sole enterprise; it is important to include the content producers as well in order to find other whether the draft corresponds to the reality at all. This is where feedback from the field will be invaluable. It can be either directly asked for, or the content producers can provide it without any prompting.

If some corrections have to be made on the draft based on the review, the process is transferred back to writing phase in order to correct the errors. If everybody is satisfied with the draft, the process halts until new cycle begins. This may be caused either by some external change that requires the style guide to react or by feedback given from the users. On the second and later rounds, it would be useful to start by reviewing the style guide in order to find out the required extend of the changes and only moving on to a new planning phase after that.

It pays to take time to plan the style guide development with care. Good planning will result in a style guide that is better suited for the company's needs and also easier to use. Instead of just jumping to writing the style guidelines, it is more useful to take a look on what are the issues most in need of some instructions. This way the style guide can support just those key areas right from the beginning.

Involving the users of the style guide, the content producers, in its creation will have two main benefits. First, like with any user manual, it is important to determine the level of knowledge of the target audience in order to tailor the manual to their needs. This will help to tackle those problems that writers stumble upon most often as the writers are the best experts to pinpoint these issues. Second, participation bonds the writers to the style guide, and they will help to enforce the guidelines. Creating a style guide that nobody uses is waste of both time and money, but if the style guide can easily provide the answers the writers need, they are guaranteed to use it.

Both the service provider's and client's style guide benefit from the use of reference style guides. They relieve the style guide team from reinventing the wheel and allow them to concentrate on covering style issues specific to the company's documentation in a house style guide. In some cases, a generic style guide might suffice for the company, but in most cases generic style guides are too generic to give answers to company specific style matters. In any case, they provide a theoretical base on which to built the house style guide. Quite often it is simply enough to record the cases where the house style deviates from the general style guidelines.

The differences between the service provider's and the client's style guides stem mainly from the different operating environments. A client's style has only one set of style regulations, to be included in the style guide. Even a service provider's style guide can be as straightforward as this, if the company has only one client. However, if the company has several clients, like ETI has, the situation becomes more complicated as there are more, possibly even contradictory guidelines from different clients that all need to be taken into account in developing the style guide. The style guide can either go around them by referring to the clients' style regulations whenever those differ from the service provider's house style, or to try to avoid them completely by staying on a very general level.

This thesis has presented two examples on style guide creation which have gathered up some practical information on developing a style guide, especially on the planning phase. The lessons learned can hopefully aid other style guide projects to avoid the most common mistakes. What has been left out from this study, due to practical reasons, are the detailed description on the production of a client's house style guide as well as how to successfully take a style guide into use after it has been finished. These would offer opportunities for further studies. Other interesting questions outside the scope of this thesis are how the content producers, the users of the style guide, do receive it, as well as what the process reviewing the style guide is like.

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