



Global Payments Solutions (GPS)

Applications' Style Guide

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1 Introduction

1.1 Target Audience

This guide is intended to provide guidelines for global Finastra UI (User Interface) team members for standardizing, clarifying, and simplifying the creation of user facing application elements. These guidelines enable UI content professionals to ensure consistency, clarity, and accuracy in the creation of this content.

2 Writing Guidelines

2.1 Language and Spelling

Use American (U.S.) English in all documentation. This language is the form of English used in the United States and includes all English dialects used within the United States.

Perform a spell check on text prior to submitting it, using English (U.S.) spelling. From Word, define and run the spell checker in English (United States).

2.2 Bias Free Communication

Finastra applications need to depict diverse individuals from various walks of life, and for that reason, do not use terms that show bias with regard to: gender, race, culture, ability, age, sexual orientation, disability, or socioeconomic status.

Use only gender-neutral terms to refer to human beings, instead of specific masculine or feminine terms.

Use plural nouns and plural pronouns. Avoid problems with using singular nouns and pronouns by using plural ones:

- **No:** To log in, the user must enter his login name and password.
- **Yes:** To log in, enter your login name and password.
- **Yes:** To log in, users must enter their login names and passwords.

2.3 Style

Good writing style is synonymous with strong communication. A few basic stylistic considerations include simplicity, directness, and accuracy, which helps improve communication in our applications.

These considerations also add to usability and are easier and less costly to translate.

When writing technical documentation of any type:

- Use active voice. See [Voice and Tone](#).
- Empower the reader by using language that informs and encourages them.
- Respect the reader's level of technical knowledge and competency.
- Use short, plain words whenever possible and avoid jargon and slang.
- Omit unnecessary words.
- Write clear, easily understood sentences that are useful to the user.
- Write in an appropriate way that suits the situation. Adapt your tone depending on what you are writing about. See [Voice and Tone](#).

- If relevant, use bulleted lists or tables to present related information.

Readers project some significance onto every change in tone, language, or typographic convention. A consistent style enables readers to internalize the language and text conventions of an application. As a result, understanding occurs more easily and significant points stand out more clearly.

2.4 Grammar

This section focuses on grammatical style issues that must be taken into account when writing UI documentation content.

2.4.1 Person

In general, address the user or reader as “you.”

Second person, or direct address, use the personal pronoun “you,” which helps avoid a passive voice because it focuses the discussion on the user.

2.4.2 Tense

Use simple present tense to help readers scan material quickly. Try to avoid all other tenses.

	Tense	Example
1.	Correct	The Profile dialog box appears.
	Incorrect	The Profile dialog box will appear.
2.	Correct	When the definition of a specific profile changes, the profile displays as pending until changes are either approved or declined.
	Incorrect	When the definition of a specific profile has been changed, the profile will be displayed with a pending status until the changes are either approved or declined.

2.4.3 Sentence Length

Use sentences of a reasonable length. Complex, compound sentences are difficult to understand, even in one’s native language. Be specific and avoid vague language.

Often two short sentences can clearly express an idea. If you are having trouble punctuating a long sentence, consider breaking it down into two shorter ones. If a sentence exceeds more than 16 words in length, it may be too long. Also remember to use one space between sentences and after the use of a comma.

Note: Sentences are often longer in other languages than they are in English, which can impact on [Localization](#).

Wherever possible, state the task or purpose at the beginning of the sentence. Always remember, a period marks the end of a sentence. For more information see [Periods](#).

Example:

To view messages, open the queue.

2.4.4 Punctuation

Writers must be consistent when adding punctuation and adhere to stringent punctuation rules. For example, every English sentence must end with punctuation, such as a period, or a question mark. Other relevant and often used punctuation marks are included below.

Note: This includes sentences in a bulleted list. Short sentences and single words in a bulleted list are not required to end with punctuation.

2.4.4.1 Periods

A period marks the end of a sentence and goes inside quotation marks. They go outside parentheses when the parenthetical is part of a larger sentence, and inside parentheses when the entire sentence is parenthetical (i.e. stands alone).

Example:

- The file is uploading (this might take a few minutes).
- (Avoid taking the above action.)

2.4.4.2 Commas

Use a comma after all introductory elements. Any element, regardless of the length, which is located before the main clause should be punctuated with a comma. (The main clause is that core part of a sentence that makes it a complete sentence; that is, it expresses a complete thought.)

Example:

- When an atom acquires enough energy to leave its orbit, the atom is positively charged.
- Today, the computer consortium of IBM, Motorola, and Apple is announcing its new PowerPC chip.

Use a comma between all independent clauses. Whenever you have a compound sentence (those are the ones joined by and, but, or, nor, for, whereas), put a comma before the conjunction (the words listed in the previous parentheses). Length of the compound sentence does not matter.

Example:

The tank is made of aluminum, but the outer surface is protected by a spray-on foam.

Use a comma before the 'and' in a series of three or more. In a series of three or more words or phrases, put the comma before the 'and' that occurs before the final element. You may have heard that this series and comma rule is optional. However, there are situations where the lack of the series- and comma can cause confusion. And when you consider that using the series and comma cannot hurt the meaning of the sentence, it makes sense to use it in all cases.

Example:

The development years involved designing the components for the Space Shuttle's engines, testing the original designs, and retesting the redesigned components.

2.4.4.3 Colons

Although the colon has other uses in writing, its most important function is to act as a signal to the reader that specific information is forthcoming.

Example:

To make a kite, you need the following items: string, paper, thin sticks, glue, and scissors.

2.4.4.4 Apostrophes

Apostrophes denote possession. The rules are as follows:

To show possession for singular words add an apostrophe and an s ('s):

Example:

- Earth's shadow
- The fish's eye
- The Moon's orbit
- The class's size
- The lens's diameter

2.4.4.5 Hyphenation

Hyphenate two or more words that precede and modify a noun as a unit to avoid confusion.

Example:

- top-level assembly
- read-only memory

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

Example:

- copy-protected disk
- free-moving graphics

Hyphenate two words that precede and modify a noun as a unit if the two modifiers are a number or single letter and a noun or participle.

Example:

- eight-sided polygon
- 16-bit bus
- I-beam insertion point

Hyphenate compound numerals and fractions.

Example:

- their forty-first birthday
- one-third of the page

Use a hyphen to indicate a range or span of numbers.

Example:

- It takes 20-30 days

2.4.4.6 Slashes

Avoid using slashes (/) where possible. If you do use a slash, do not insert a space before or after it.

Example:

and/or

2.4.4.7 Question Marks

Question marks go inside quotation marks if they are part of the quote. Like periods, they go outside parentheses when the text in parentheses is part of a larger sentence and inside parentheses when the text in parentheses stands alone.

2.4.5 Ampersands

Do not use ampersands unless one is used as a part of a company or brand name.

- Ben and Dan
- Ben & Jerry's

2.4.6 Prefixes

In general, do not hyphenate words that begin with prefixes (such as multi or sub) unless it is necessary to avoid confusion, if the name of a brand or organization includes a hyphen, or, if the stem word is a proper noun.

2.4.6.1 Rules for Using Hyphens with Prefixes

- Hyphenate the word when you add a prefix before a proper noun or a numeral.
Examples: un-American, pre-1980
- Hyphenate the word when you add the prefix ex meaning former.
Example: ex-president (Do not use a hyphen if ex means out of or away from, as in expel.)
- Hyphenate after the prefix self.
Examples: self-respect, self-assured, self-control
- Hyphenate to separate two a's, two i's, or other letter combinations that might cause misreading or mispronunciation.
Examples: ultra-ambitious, anti-intellectual, co-worker
- A hyphen may be used to separate two e's or two o's to improve readability or prevent mispronunciation.
Examples: co-opt and co-owner vs. coordinate; de-emphasize vs. reenter

Note: many words with double e's used to be hyphenated as a general rule, as in re-elect, re-establish, and pre-existing. However, current style manuals and dictionaries now tend toward 'closing' the word except in cases where readability is affected. Both versions are currently accepted and listed in most dictionaries.

- A hyphen is sometimes used after the prefix re to prevent misreading or confusion with another word.

Examples: re-cover vs. recover, as in Re-cover the boat when you recover from the flu. re-lay vs. relay, as in Please relay the message that they will re-lay the tiles

2.4.7 Acronyms

Acronyms are acceptable for widely recognized words, but with the first instance of the word in a document, write out the acronym completely, followed by the acronym in parentheses, for example, Application Service Provider (ASP). The acronym can then be used in all references following the first instance of the word.

Note: When using Finastra in a sentence, always write out the name in full.

Do not abbreviate product names. For example, do not shorten Active View Item Processing to Active View IP or AVIP. For a current list of Finastra product names, see [Finastra.com](https://www.finastra.com).

2.4.8 Plurals

Form the plural of an acronym or a number by adding an 's' with no apostrophe.

Example:

- APIs
- CPUs
- 486s

Additional Examples:

- To add rows or columns to a table...
- To add one or more rows to a table...

Avoid: To add a row(s) or column(s) to a table...

2.4.9 Percentages

Do not use the % symbol. Spell out the word 'percent.'

Example:

- 50 percent

2.4.10 File Extensions

When referring to a file extension type, use uppercase without a period. Add a lowercase 's' to make the extension type plural.

- GIF
- PDF
- HTML
- JPGs (plural)

2.4.11 URLs and Websites

Capitalize the names of websites and web publications. Do not italicize.

Example:

- Time Magazine
- The BBC

Avoid spelling out URLs, and if possible do not include: <http://www>, but rather use the name of the URL with the relevant link.

2.5 Capitalization

Only capitalize when absolutely necessary. The majority of the application text will be capitalized using Sentence Capitalization. It is easier and more natural to read, and therefore is more adequate for most controls: labels, fields, lists, group box (frame) headers, radio buttons, dropdown lists, checkboxes etc.

To achieve a consistent sentence capitalization, make sure you capitalize the first letter of the first word, and any other words normally capitalized in sentences, such as names, brand names etc. e.g. Are you sure you want to quit Global PAYplus?

Use these guidelines for consistent capitalization:

- Capitalize field names and data grid titles, as they appear in the User Interface, such as **Column**, **User ID**, or **Continue**.
- Capitalize button action words, such as **Submit**, **Next**, or **Continue**. See [Buttons](#).
- Capitalize the first word for option buttons and sentence case for button field items. See [Option Buttons](#).
- Capitalize the first word for checkbox items and sentence case for checkbox items. See [Checkboxes](#).
- Capitalize the first word for dropdown list names and sentence case for menu items. See [Dropdown Lists](#).
- Capitalize navigation titles for main or global navigation.
- Capitalize all acronyms, e.g. MOP, BIC, SDD, USD etc.
- Capitalize Finastra product names exactly as they are branded. For a current list of Finastra product names, see Finastra.com
- Use a standard 3-number World Bank Code as a country acronym. For example, for United States, use USA, or for Mexico, use MEX. For a current list of World Bank Codes by country, see <http://www.irows.ucr.edu/research/tsmstudy/wbcountrycodes.htm>.
- Capitalize names of Countries, U.S. states, such as Arizona, Canadian provinces, such as Saskatchewan, or other territories or country divisions as needed.
- Capitalize the first word of every letter in **Error! Reference source not found.**, except articles, coordinating conjunctions, and prepositions of three letters or fewer. However, any word that is the first word in the headline or the last word should be capitalized.
- Capitalize all Group titles. Never capitalize an entire sentence. Many people find it difficult to read blocks of upper case text as it loses the shape of the words. Also IT COMES ACROSS AS IF BEING SHOUTED AT!
- Use Military time to avoid confusion between a.m. and p.m. hours. Military time operates on a 24-hour clock that begins at midnight which is referred to as 0000 hours, with 1:00 a.m. being 0100 hours, 2:00 a.m. being 0200 hours, etc. all the way to 11:00 p.m. being 2300 hours. The most notable difference between regular and military time is the manner in which hours are expressed., to indicate time of day.
- Capitalize the word 'Bank' in bank names that include the word 'Bank', such as **Roza Bank** or **Deutsche Bank**.
- Do not capitalize random words in the middle of sentences. Here are some words that we never capitalize in a sentence:
 - website
 - internet

- online
- email
- Words that never get capitalized (unless they come after a colon or in the beginning/ending of a sentence) include: the, a, an, of, for, by, to, on, as, for, and, but, nor, or

For more words that might be problematic see [Common Word Usage](#).

2.6 Writing Clean Content

This section identifies words, phrases, constructions, and practices that often lead to abstract or unclear meaning, disjointed cadence, or unnatural and improper language usage.

2.6.1 Redundancies

Redundancies occur when the literal meanings of the words repeat unnecessary meaning to a phrase. This table lists some common examples of redundancies and alternatives.

Note: If you are not sure about a term/word contact the technical writing team for guidance.

Instead of	Use
Accidental mistake	Mistake
Add additional	Add
Add on	Add
Already exists	Exists
At this point in time	At this point, OR at this time
Basic fundamentals	Fundamentals
Boot up	Boot
Check to be sure	Check, ensure, make sure
Close proximity	Close, near, nearby
Connect together	Connect
Create a new	Create
Dial up	Dial
Edit an existing	Edit
Existing conditions	Conditions
First create	Create
Group together	Group
Necessary prerequisites	Prerequisites
Print out	Print
Specific requirements	Requirements
Start up	Start

Instead of	Use
Still pending	Pending
Time out	Time
Whether or not	Whether, if
Appropriate	Relevant

2.6.2 Roundabout Phrases

Avoid	Comments	
Remove wordy, roundabout expressions and phrases.	Instead of	Use
	due to the fact that	because
	during the course of	during
	for the most part	usually
	for the purpose of	for
	given the condition that	if
	in an efficient manner	efficiently
	in case of a	in a
	in case (in the case that)	if
	in conjunction with	with
	in order for	for
	in order to	to
in the event that	if (or when)	

2.6.3 Repetitive Words

Avoid	Comments	
Simplify phrases and minimize wordiness to avoid needless repetition.	Instead of	Use
	by means of	by
	create a new	create a
	end result	end (or result)
	exactly the same	the same
	group together	group
	refer back	refer

Avoid	Comments	
	repeat again	repeat
	subject matter	subject

2.6.4 Long Words

Avoid	Comments	
Choose direct, short words.	Instead of	Use
	accomplish	do
	additional	more
	construct, fabricate	make
	enumerate, itemize	list
	initiate, commence	begin, start
	locate	find
	majority	most
	perform	do
	present	give, show, tell
	prior to	before
	terminate	end
	utilize	employ – use
	via	by, through

2.6.5 Phrasal Verbs

Avoid	Comments	
Avoid phrasal verbs; these can create confusion for non-native speakers of English.	Instead of	Use
	speed up	Accelerate
	line up	Align
	fill in, fill out	Complete
	put off	defer (or postpone)
	cut off	disconnect
	leave out	exclude
	look at	review

Avoid	Comments	
	bear in mind; keep in mind	remember

2.6.6 Ambiguous Words

Avoid	Comments	
Use one word instead of two or three to avoid use of ambiguous words.	Instead of	Use
	as	because
	as long as	if
	in spite of	regardless, despite

2.6.7 Contractions

Do not use contractions, such as “can’t”, “don’t”, and “won’t”. The word “cannot”, which is one word, is acceptable.

2.6.8 Writing Concisely

This table provides more information about words, phrases, and expressions to avoid when writing concise technical documentation:

Avoid	Comments	
Do not include more than one negative word (double negative) in a sentence. Replace “not” combinations with one word.	Instead of	Use
	not many	few
	not the same	different
	not different	similar
	not unlike	like
	not exclude	include
	not until	only when
	not unless	only if
	does not have	lacks
	does not allow	prevents
	does not accept	rejects
	not able	unable
	not possible	impossible

Note: In general use positive language rather than negative language. One way to detect negative language is to look for words like ‘cannot,’ “do not,” etc.

2.6.9 Ambiguous words

Avoid	Comments	
Use one word instead of two or three to avoid use of ambiguous words.	Instead of	Use
	as	because
	as long as	if
	in spite of	regardless, despite

2.7 Common Word Usage

This table provides guidance about using words that are commonly used in technical documentation.

Word	Usage
add-on, add on	add-on (noun, adjective), add on (verb).
back end, back-end	back end (noun), back-end (adjective)
biannual, biennial	Biannual indicates twice a year and is a synonym for the word semiannual. Biennial indicates every two years.
bimonthly	Bimonthly indicates every other month; Semi-monthly means twice a month
checkbox	One word, no hyphen
check in vs. check-in	Two words as a verb; hyphenated as a noun or adjective
client vs. customer	Client refers to financial institutions that use Finastra products and services. Customer refers to consumers of a financial institution.
comprise; compose	To comprise is “to be made up of, to include.” To compose is “to make up, to form the substance of something.” The phrases comprise of or comprises of, though common, is poor usage. Instead, use composed of, consists or consisting of, or made up of.
coworker	One word, no hyphen
data center	Two words
date	Spell out the name of the month (November 4, 2017) Do not use day abbreviations if you are writing the complete date (November 4, 2017, rather than November 4th, 2017). When a phrase lists a month and a year, do not separate the year with commas, for example, January 2017 proved to be a strong Sales month. When a phrase refers to a month, day and year, set

Word	Usage
	off the year with commas, for example, He told the R&D team that he needed the final presentation by Friday, December 3.
Daylight Saving Time	(DST); Saving is singular, not plural (savings)
Double-click	Hyphenated
Dropdown Drop down	Dropdown is used when the relevant <Field Name> is selected from the Dropdown list. Drop down is the verb.
e-commerce	e-commerce (the industry), hyphenated
email	Lowercase, one word, no hyphen
end user; end-user	Two words as a noun; hyphenated as an adjective
emoji	emoji (singular and plural)
front end, front-end	front end (noun), front-end (adjective)
geolocation	Lowercase
hyperlink	One word
Internet	Uppercase
intranet	Lowercase
ISP	Internet Service Provider; spell out on first use
login vs. log in	Login is a noun. Log in is a verb form, for example, I log in to my computer.
numbers	Spell out single-digit numbers; use numerals for 10 and above. Except for years or dollar amounts, do not start a sentence with a number.
offline	One word, no hyphen
offsite	One word, no hyphen
online	One word, no hyphen
that vs. which	Use that for essential clauses, important to the meaning of a sentence, and without commas, for example, I recall the day that the conference was cancelled. Use which for nonessential clauses, where the pronoun is less necessary, and use commas, for example, The team, which finished last a year ago, is now in first place
time	Always list the minutes for times (10:00 A.M.) Use periods but no spaces when referring to A.M. and P.M.

Word	Usage
	Put a space between the hyphen when listing a timeframe (10:00 A.M. – 11:00 P.M.)
time zones	Use capitalized acronyms, for example, PST for Pacific Standard Time
user name	Two words
VoIP	Voice Over Internet Protocol
Web	Uppercase W when using the abbreviated form of World Wide Web
web-based	Hyphenated
webpage	One word, lowercase
website	One word, lowercase
who, whom	The word Who is the pronoun used to refer to human beings or to animals with a name. It is grammatically the subject (never the object) of a sentence: The woman who rented the room left the window open. Whom is used when someone is the object of a verb or preposition: The woman to whom the room was rented left the window open.
Wi-Fi	Hyphenated; Uppercase 'W' and capital 'F'
workflow	One word

2.8 Localization

Localization involves the use of language professionals who translate the source application's words and adapt its content to the needs and norms of the target country or market. Because language professionals can work only with what they are given, the source content creator must adhere to the GPS Applications' Style Guide directives, which will ensure that the localization process is effectively performed.

2.8.1 Date formats

- Date format in documents related to products is based on the standard U.S. format (MMDDYYYY).
- Where possible, display the month in full followed by DD and then YYYY, for example, December 02, 2018.

2.8.2 Currency

When writing about currency, use the currency symbol (e.g. \$) before the amount. Include a decimal and number of the lower denomination if more than 0. Alternatively, you may use the 3 letters ISO currency code

- \$20
- \$19.99
- JPY 500
- GBP 10,000

Note: Although the currency symbol (e.g. \$) before the amount is widely used it might differ for some countries.

2.8.3 Telephone Numbers

Write telephone numbers as per the format used in the country for which you are providing the telephone number for. These numbers will include a country prefix code and possibly also a county code.

2.9 Content Formatting

2.9.1 Lists

- Lists must include at least two items. Use a list when you have a list of two or more items in which any of the items consists of two or more words, or, when you have a list of two or more items in which any of the items is a link.
- Use secondary entries only if you cannot avoid them. Complex entries defeat the easy-to-read format of a list.
- Use unnumbered (bulleted) lists when the entries are not dependent on the sequence in which you present them.

Use a bulleted list to:

- Break out information from paragraph format.
- Structure the information into an easier-to-read format.

Use a numbered list to:

- In a procedure, as procedural steps
- When the entries are dependent on sequence, use numbered lists with numerals and letters to build the hierarchy.

2.9.1.1 Capitalizing and Punctuating Lists

- Capitalize the first word of each entry in all lists, whether or not the entry forms a complete sentence.
- Capitalize product names exactly as they are branded.
- Capitalize an individual's title only when placed before the individual's name, for example, Vice President John Smith.
- Do not use a period at the end of short items in a list.
- Use a period at the end of each item in a list of complete sentences.
- Avoid mixing complete sentences and sentence fragments (short items) in the same list. If you must have a mixed list, add periods at the end of every list item.
- Begin each item in a bulleted list with a capital letter.
- If a list begins with a summary word or phrase followed by an explanation: Only the first letter should be a capital letter unless the word is capitalized, for example, queue names.

2.9.1.2 Writing Bulleted Lists

- Bullets are used for lists when the order is not important (for example, a list of options in a dialog box).
- If there is only one item in the list, it is not a list, and should not be included in a bullet.
- Introduce a list with a sentence or fragment ending with a colon.
- Begin each item in a bulleted list with a capital letter.
Do not use a period at the end of each item for one-word or brief items.

Example:

The **Styles** ribbon in the **Home** tab includes these groups:

- Clipboard
 - Font
 - Paragraph
 - Styles
 - Editing
- If the list items are complete sentences, use a period at the end of each item.

Example:

Perform one of the following actions:

- Create a new file.
 - Copy a file to a different folder.
 - Quit the Microsoft Excel software.
- If a list begins with a summary word or phrase followed by an explanation:
 - Only the first letter should be a capital letter unless the word is capitalized, for example, queue names.
 - Summary word or phrase is in bold. This style is often referred to as a bold lead-in. This structure works well when you have explanatory text for each entry.
 - Use a colon (:) after the summary word or phrase. This colon is also bold.

Example:

These options are available in Word:

- **General:** General options for working with Word.
- **Display:** Change how document content is displayed on the screen and when printed.
- **Proofing:** Change how Word corrects and formats your text.

2.9.1.3 Writing Numbered Lists

Use numbered lists for multiple-step user tasks within a procedure.

User tasks should contain no more than ten steps if possible. If a task has more than ten steps, consider breaking the task down into small subtasks.

When writing a procedure:

- Use active voice.
- Capitalize the first word in each step.
- Begin each step with an action or command that the user is required to perform. Do not begin a step by describing the result of the previous step.
- Use complete sentences.
- Use a period after each step.

Example:

To share your printer:

1. Click **Start**.
2. Select **Settings**.
3. Click **Printers**.
4. In the Printers page, select the printer that you want to share.
5. On the File menu, click **Sharing**.

A step may contain more than one action, where it is logical to do so. Combining steps can reduce the number of steps in longer procedures. For example, if a user needs to set several options in a single dialog box, these may be combined into one step.

Example:

Sending a message with GPP involves these basic operations:

1. Starting GPP.
2. Creating a message.
3. Adding text to a message.
4. Sending the message.
5. Closing GPP.

The text for instructional steps in a numbered procedure is different from the style used for a numbered list. This is an example of the text of instructional steps in a numbered procedure.

Example:

To send a message with GPP, perform these basic operations:

1. Start GPP.
1. Create a message.
2. Add text to the message.
3. Send the message.
4. Close GPP.

This table shows examples of the correct usage of introductory words when used with procedures.

Use	Examples
Click	Click Start . Click the Insert tab.
Select	Select the Administrator Only checkbox. Select the Savings Account option button. Select the Print option from the File menu. Select the settings, and then click OK .
On	From the View menu, click Ruler . From the Insert tab, in the Links group, click Hyperlink .
In	In Control Panel , double-click Display .

Use	Examples
	In the User Name box, enter the name of the user. In the Printers page, select the printer that you want to share.
Under	Under Window Options , select the Resize window to initial page option , and then select Document Title from the Show dropdown.

2.9.2 Buttons

Buttons must always contain **actions**. The language should be clear and concise. Capitalize every word, including articles. It's OK to use an ampersand in button text. See [Capitalization](#).

Standard website buttons include:

- Log In
- Sign Up Free
- Subscribe
- Email Us

Use enough text to explain the command button efficiently. Ideally, users shouldn't have to read anything else to understand the label and functionality.

2.9.3 Option Buttons

- Use a label for every option button and place text immediately to the right of the option button.
- Use natural language – write the label as a phrase, without ending punctuation. Try to keep the labels as clear and as brief as possible.
- If further explanation is required, provide this information in a static text control using complete sentences and ending punctuations
- Use positive phrasing and sentence-style capitalization and try to maintain roughly the same length for a list of option buttons.
- Use parallel phrasing; emphasize the differences between the options by using similar text on labels. If all labels have the same introductory text, move that text to the group label
- Keep all labels single-lined. If you must use multi-line labels, align the top of the label with the radio button.

2.9.4 Checkboxes

- Use a label for every checkbox and place text immediately to the right of the control.
- Use natural language – write the label as a phrase, without ending punctuation. Try to keep the labels as clear and as brief as possible and make sure to use sentence-style capitalization.
- For a group of checkboxes, try to maintain roughly the same length throughout labels
- For a group of checkboxes, use parallel phrasing and emphasize the differences between the options by using similar text on labels.
- If all labels have the same introductory text, move that text to the group label.

2.9.4.1 Group Boxes

- Label all group boxes using sentence style capitalization.
- Keep the label concise, without instructions on the label. If instructions are needed, include them as a text field within the group box
- Do not repeat the group box label in control labels within the group box.

2.9.5 Dropdown Lists

- Use consistent dropdown control and use a label for every dropdown list.
- Use natural language. Write the label as a phrase, without ending with punctuation. Try to keep labels as clear and as brief as possible
- If further explanation is required, provide this information in a static text control using complete sentences and ending punctuations
- Use sentence style capitalization.
- Position the label either to the left of or above the dropdown list. If the label is on the left, vertically align the label text with the control text. If the label is on top, align the label with the left edge of the control.
- Keep all labels single lined. If you must use multi line labels, align the first row of the label with the control text.

2.9.6 Labeling Tabs

This section applies to header and regular tabs.

- Use concise tab labels, with one or two words that clearly describe the content of the tab page
- Use nouns rather than verbs, without ending punctuation.
- Use sentence upper case only in tab names.
- Use specific and meaningful tab labels. Refrain from generic tab labels that can apply to any tab, such as General, Advanced or Settings
- If the entire tab content is disabled, add a text label at the bottom of the tab page explaining the reason for the tab disabled state.

2.10 Error Messages

An error message alerts users of a problem that has occurred. By contrast, a warning message alerts users of a condition that might cause a problem in the future.

Effective error messages inform users that a problem occurred, explain why it happened, and provide a solution so users can fix the problem. Users should either perform an action or change their behavior as the result of an error message.

Note: Well-written, helpful error messages are crucial to a quality user experience. Poorly written error messages result in low product satisfaction, and are a leading cause of avoidable technical support costs. Unnecessary error messages break users' flow.

Examples:

- Cannot move Sent Items.
The Item was already moved or deleted.
- Cannot log on because the server is temporarily unavailable.
Check your network connection and try again.
- Cannot find a camera.
Make sure the camera is turned on and connected to the computer.

When documenting error messages, follow these guidelines to write good error messages which should follow the order listed:

- A problem. States that a problem occurred.
- A cause. Explains why the problem occurred.
- A solution. Provides a solution so that users can fix the problem.

In addition, good error messages are presented in a way that is:

- Relevant. The message presents a problem that users care about.
- Actionable. Users should either perform an action or change their behavior as the result of the message.
- User-centered. The message describes the problem in terms of target user actions or goals, not in terms of what the code is unhappy with.
- Brief. The message is as short as possible, but no shorter.
- Clear. The message uses plain language so that the target users can easily understand problem and solution.
- Specific. The message describes the problem using specific language, giving specific names, locations, and values of the objects involved.
- Courteous. Users shouldn't be blamed or made to feel stupid.
- Rare. Displayed infrequently. Frequently displayed error messages are a sign of bad design

2.11 User Alerts

User alerts convey important information related to the state of your application, and often request feedback. Therefore, write short, descriptive, multiword emphasized (bold) alert titles. The less text to read onscreen the better.

This text needs to provide a short, simple summary of the condition that prompted the alert. This should be a complete sentence, and often it is presented as a question. Use sentence-style capitalization and appropriate punctuation for complete sentences.

A good alert message states clearly what caused the alert to appear and what the user can do about it.

Various user alerts are described below.

- Notifications
- Warning Messages
- Confirmation Messages
- Success Messages

2.11.1 Notifications

A notification or general information message informs users of events that are unrelated to the current user activity, by briefly displaying a pop-up from an icon in the notification area. The notification could result from a user action or significant system event, or could offer potentially useful information from the application.

The information in a notification needs to be both useful and relevant, but never critical. Consequently, notifications do not require immediate user action and users can freely ignore them.

The number of times to display a notification is based on its design pattern:

Pattern	How often to notify
Action success	Once.
Action failure	Once.
Non-critical system event	Once when the event first occurs. If this results from a problem that users need to solve, redisplay once a day.

Pattern	How often to notify
Optional user task	Once a day for a maximum of three times.
FYI	Once.

Example:

- Windows installed new updates.
Your computer was restarted to finish installing updates.

2.11.2 Warning Messages

A warning message alerts the user of something significant or a condition that might cause a problem in the future.

Examples:

- The network cable might be unplugged.
- This page contains both secure and nonsecure items.
Do you want to display the nonsecure items?
Yes / No

2.11.3 Confirmation Messages

A confirmation message asks if the user wants to proceed with an action.

Example:

- Do you want to uninstall the Setup Support Files?
Microsoft SQL Server 2017 Tools Express Edition is dependent on these files.
Yes / No

2.11.4 Success Messages

A confirmation informs the user that the action taken resulted in success.

Example:

- Your device is ready to use
- Device driver software was installed successfully.

2.12 Logs

Logs or Log files are files that record either events that occur in an operating system, or the result of running specific software, or messages between different users of a communication software.

2.12.1 Rule Log

The Rule log is common to multiple transaction types and contains a record for each rule invoked on a transaction or payment related message during transaction processing.

2.12.2 System Log

The System log file contains events that are logged by the operating system components. These events are often predetermined by the operating system itself. System log files may contain information about device changes, device drivers, system changes, events, operations and more.

Example:

Web servers maintain log files that list every request made to the server. With log file analysis tools, it is possible to get a good idea of where visitors are coming from, how often they return, and how they navigate through a site.

2.12.3 Interface Log

The Interface log is used for logging external interface authentication.

3 Voice and Tone

The Voice and Tone of our applications should enable us to have a conversation with our users, rather than just being tools that mechanically prompt information that lacks personality. Our voice makes us unique while our tone makes us sound human.

Voice and Tone is more than the words we choose. It is the way in which we communicate our personality as well as provide information. Voice and Tone is the way we tell our users how we feel about the information we are providing, and it will also influence how users feel about our information too.

3.1 Voice

When writing text ensure you maintain the voice of someone whose spoken tone of voice is friendly and confident and is not mechanical and distant as if tasked with producing a formal report.

Consider the following when writing:

Use an active voice, and not a passive voice, when writing end user text. Active voice indicates who or what is performing the action of the sentence, and makes sentences simple yet meaningful.

In a sentence with active voice, the subject directly performs the action. Example 1 in this table shows that the subject is 'page' and the action is 'displays':

	Voice	Example
1.	Active	The page displays the new field.
	Passive	The page will display the new field.
2.	Active	Arrange icons in alphabetical order.
	Passive	Icons can be arranged by name in alphabetical order.
3.	Active	The system is reliable.
	Passive	The system has proven to be reliable.
4.	Active	To define the member type, first create a membership profile.
	Passive	Define the member type by first creating the membership profile.
5.	Active	You must first create the membership profile to define the member type.
	Passive	The member type is defined by first creating a membership profile

Only use a passive voice to indicate if the performer of the action is either unimportant to the reader or unidentifiable.

Passive sentences typically use a form of be (was, am, are, been). Typically used in requirement and solution documents, this document type is usually written by Business Analysts, and indicates anticipated behavior of an application. Long sentences in the passive voice may indicate that your writing style may be too formal.

3.1.1 Indicative Mood

The indicative mood is used to express general information such as facts, assertions, questions or queries, or explanations.

	Mood	Example
1.	Correct	It is important to complete this procedure before taking any other action.
	Incorrect	It is important that this procedure be completed before any other action is taken.
2.	Correct	Select the desired messages then click Group All .
	Incorrect	Select the desired messages, and then you can click the Group All button.
3.	Correct	Enter your password and click OK .
	Incorrect	The first step is to type a password, and then click OK .

3.2 Tone

Use a tone that inspires confidence by communicating to users on a personal level by being accurate, encouraging, insightful, objective, and user focused. In addition, also strive to be light, inspiring, straightforward, and trustworthy.

Tone in writing is the attitude that the writer conveys to the user, which is intended to create a positive response or emotion from the user.

Consider the following when writing:

- Use a professional business style tone that is polite and friendly.
- Do not use humor in technical documentation. Readers may interpret a humorous attitude as flippant or disrespectful personally, or to their culture.
- Avoid using a conversational tone that implies judgment about the complexity of the task.
- Avoid words like actually, easily, simply, or just.

3.3 Persona of the System



Amy's Designation

Amy is here to accompany and guide you through your use of the GPS Applications. She is here to make your user experience a pleasurable one, inform and notify you of developments as you proceed and help should you encounter any difficulties.

NAME **Amy B**

TITLE **Payments Consultant**

BACKGROUND



46 years old



Global Payments Technology CIO



250K / Year



Marital Status: Married (+3)

TECH PREFERENCES



Macintosh



iPhone



iPad

Key Characteristics

- Nationality: American
- Place of Origin*: New York
- Race: Mixed Race
- City of Residence: Chicago
- Socio Economic Status: Upper Middle class
- Education Level: Economics Degree from Harvard
- Hobbies: hiking, swimming, canoeing, chess

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