Portland State University

From the SelectedWorks of Sherry Buchanan

2018

University Library Editing & Style Guide - Portland State University

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b bepress™

University Library

EDITING & STYLE GUIDE

Web Pages

Portland State
UNIVERSITY

Table of Contents

Part 1: Getting Started

Options for Making Changes:

1. Email the LIB-Website-Group for new pages, page removal, or changes to pages, posts, FAQs or forms:
   lib-website-group@pdx.edu
2. Contact content owners to discuss ideas:
   [Sitemap with Primary Contacts](#) (PSU Login Required)

Workflow for New Pages

1. Gather feedback from stakeholders and/or Web Advisory Committee.
2. Email lib-website-group@pdx.edu:
   - Page title
   - Brief description
   - Proposed location of page
3. The Web Advisory Committee will review the proposal.
4. Library Technologies staff will create the page.

Important Details
- **URLs match page titles.**
- **See Also link labels are dynamically updated.**
- For extensive changes, stakeholders should be consulted.
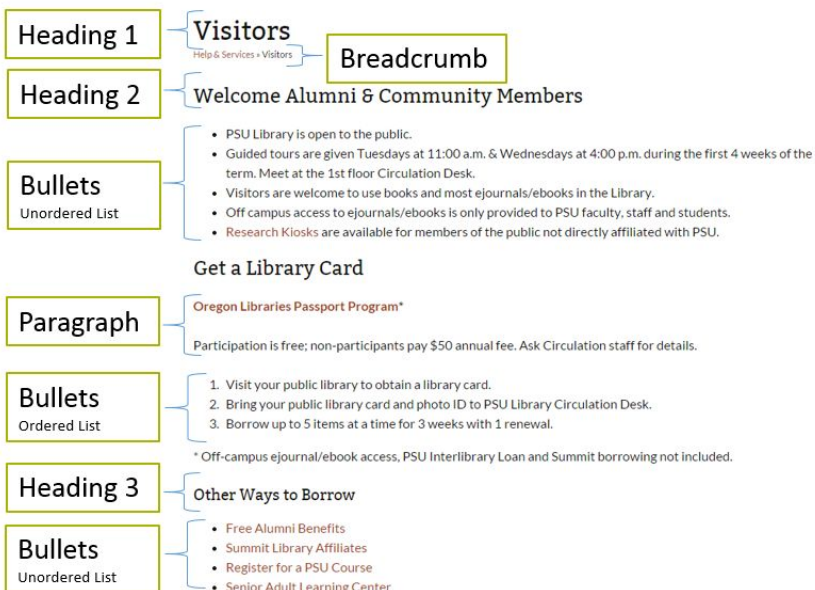- Built-in styles should accommodate most use cases, but if not, let us know.

Accessibility & Responsiveness
Accessible content is easy for everyone to use. Users access content via screen readers, mice, keyboards, touch screens, voice, and gesture, with various browsers and old technology. Our site is responsive: when the browser is resized, the content also resizes, and elements stack. Responsive web design is a web development approach that creates dynamic changes to the appearance of a website, depending on the screen size and orientation of the device being used to view it. ([See Nielsen Norman for details.](#)) Our job is to ensure website consistency, proper scaling to mobile devices, and readability for all users.
[See the Accessibility Checklist](#) to meet WCAG 2.0 Level A/AA standards/

Part 2: Parts of a Page

Main Body: Content Area

Heading 1

Visitors

Breadcrumb

Help & Services » Visitors

Heading 2

Welcome Alumni & Community Members

Bullets
Unordered List

- PSU Library is open to the public.
- Guided tours are given Tuesdays at 11:00 a.m. & Wednesdays at 4:00 p.m. during the first 4 weeks of the term. Meet at the 1st floor Circulation Desk.
- Visitors are welcome to use books and most ejournals/ebooks in the Library.
- Off campus access to ejournals/ebooks is only provided to PSU faculty, staff and students.
- Research Kiosks are available for members of the public not directly affiliated with PSU.

Get a Library Card

Paragraph

Oregon Libraries Passport Program*

Participation is free; non-participants pay $50 annual fee. Ask Circulation staff for details.

Bullets
Ordered List

1. Visit your public library to obtain a library card.
2. Bring your public library card and photo ID to PSU Library Circulation Desk.
3. Borrow up to 5 items at a time for 3 weeks with 1 renewal.

* Off-campus ejournal/ebook access, PSU Interlibrary Loan and Summit borrowing not included.

Heading 3

Other Ways to Borrow

Bullets
Unordered List

- Free Alumni Benefits
- Summit Library Affiliates
- Register for a PSU Course
- Senior Adult Learning Center

Right Sidebar

See Also

- Accessibility
- Maps & Directions
- PSU Guest Wi-Fi
- Computer Labs & Research Kiosks
- Branford's Bean Café
- Alumni Benefits

Related Links

Contact

Circulation Desk
(503) 725-5874
circ@lists.pdx.edu

Contact Info

Part 3: WordPress Dashboard

Portland State University Library + New View Page

Howdy, libsys

Screen Options ▼ | Help ▼

- Dashboard
- Media
- Pages
  - **All Pages**
  - Add New
- Grid Gallery
- Profile
- Settings
- Grid Gallery Pro
- Collapse menu

Edit Page Add New

Visitors

Permalink: http://stage.library.pdx.edu/services/visitors/ Edit | View Page | Get Shortlink

Add Media | Add slider

Visual | Text

B | I | ABC | list | list | " | — | align | align | align | link | unlink | | | |

Heading 2 | U | | A ▼ | | | Ω | | | | | | |

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Publish

Preview Changes

🔑 Status: Published Edit

👁 Visibility: Public Edit

🕐 Revisions: 48+ Browse

📅 Published on: May 30, 2014 @ 19:06
Edit

Update

Page Attributes

Parent

Help & Services ▼

Template

Default Template ▼

Order

0

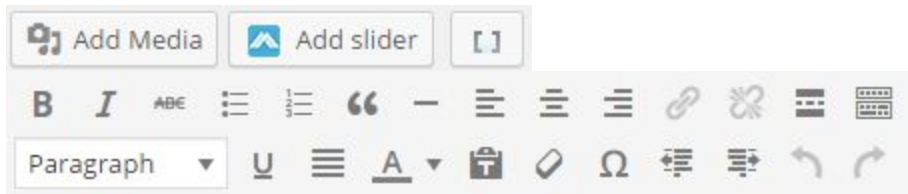Need help? Use the Help tab in the upper right of your screen.
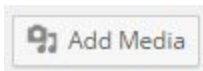
Featured Image

Set featured image

PSU Contact Info

You do not have sufficient permissions to access this content..

Part 4: WordPress Toolbar & Buttons

Add Media

Media includes graphics, photos, files such as PDFs, and video. Use high resolution images.

Document Type Best Practices

- Webpages are preferred for presenting information, unless the nature of the information is better served by another option.
- PDFs are preferable to native format because they are more broadly usable.
  When linking, put the file type in parentheses at the end (PDF).
- Native formats should only be used if absolutely necessary.
  For example: slide presentations, moving images, audio files.
- Before uploading, please ask questions about image quality and file types, or inquire about graphic design help:
  Email lib-website-group@pdx.edu

How to add an image:

1. Click Add Media, then Upload Files or Insert from URL, then Insert into Page.
2. Once an image is inserted into the page, click the pencil to caption the image.
3. Add a caption if desired. (See Captions for more details.)
4. Add Alternative Text (alt text) describing the image (do not include phrases such as "image of…" as these phrases are redundant for those using screen readers).
5. Align the image.
6. Resize the image.
7. Select None, for the "Link To" option.

More About Images

Minimum size: 150 x 100
Maximum size: 880 x 220 (panorama)
Standard size: 300 x 225

Media Library
On the left sidebar of the WordPress dashboard, click Media, then Library.
Click Add New, or view images already stored on our server. This is another option for adding or editing images, aside from the in-page toolbar Add Media button.

Captions
Captions can be used under an image or photo; the default font is italicized.
Important Note: Choose layout first, then caption the image because captioned images placement cannot be altered due to a known issue.

Animated GIFs and Flash
We do not use animated GIFs or Flash because they do not meet our usability/accessibility needs.

Screen Shots
Screenshots become outdated quickly, as software and operating systems are updated. When using a screenshot also include the same directions using text elsewhere on the page. If the same content is adequately represented as text, the alt text of the screenshot may be simple (e.g. "screenshot of requesting book"). Relying on screenshots without page text can make content inaccessible to visually impaired users.

Embedded Video
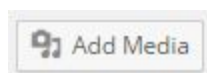
Click Add Media, then Insert from URL. Layout and proper sizing can be tricky. For more help, please ask Library Technologies staff.
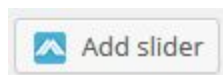
Examples:
[embed]https://www.youtube.com/watch?v=5cEQw5OfmB4[/embed]
<iframe src="https://www.youtube.com/embed/5cEQw5OfmB4" width="300" height="200" frameborder="0" allowfullscreen="allowfullscreen"></iframe>

Add Slider

To date, only the homepage has a slider. Please do not add a slider to your page without proposing the idea to the Website Advisory Committee for review.

Columns

Layout can be tricky with this tool; please ask for help with the Columns shortcode button.
The button divides the page into columns based on fractions, such as ¼, ¾, ⅓, ⅔, etc.
Varying device sizes and responsive design dictates some of our choices.

Example:
[one_half]Content[/one_half]
[one_half_last]Content[/one_half_last]
Note: Padding is overridden by CSS. Please do not add padding.

Bold <strong>

Bold is used for PSU author names on the Scholarship & Awards page and infrequently to make text stand out.

Italics <em>

Italics are used for titles of works (books, journals, artworks, etc.) and infrequently for emphasis. Note that captions are italicized by default.

Examples:
During the first 4 weeks of the term, guided tours are given Tuesdays at 11:00 am & Wednesdays at 4:00 pm
Please note, computer labs are for PSU affiliates only. Research Kiosks are available for visitor use.

Bulleted (unordered) Lists

The button creates proper code. Bullet styles should not be altered.
Ideally, bulleted items do not exceed one line (desktop view).

first item
second item
third item

Numbered (ordered) Lists

The button creates proper code. Do not "hand number."

first item
second item
third item

Blockquote

Generates an indented italicized large-font block of text.

Horizontal Rule <hr>

The button creates a dotted line to segment content. Do not style.

Align (Left, Right, Center Alignment)

You should be able to right align an image or embedded video, but occasionally the WYSIWYG editor code is created then stripped.
Text is automatically left aligned. For help, please ask.

Hyperlinks (Links)

Use these buttons to link or unlink text. General guidelines:

- Capitalize link labels.

- Front-load: put the link at the beginning of the bullet/sentence.
- Links should be 2-6 words.
- Do not link one word within a sentence. (The link is hard to see.)
- Do not link more than six words or an entire sentence.
- Punctuation should not be hyperlinked.
- If linking to an existing page, the link label should be the page title.
- Store fair use files on our server or PDXScholar
- Link straight to the file, not the referring page:
  http://library.pdx.edu/?attachment_id=4356

Link Examples:

- Research Kiosks are available for members of the public not directly affiliated with PSU.

- iPad, Laptop & Equipment Checkout
  Borrow a calculator, headphones, and more.

**Spacing **
Just press enter to create one line break. In code view, use
The WYSIWYG editor will not allow more than one line break, but you can use this code:
<br style="clear:both;" />
Hard line breaks <br> and spacing code can be stripped from the code by the WYSIWYG editor.
Spacing around tables, headings, and images is set at the CSS level.
If elements seem to have too much or not enough space, let us know.

Paragraph text <p>

Paragraph ▲

This is the default font for paragraphs.
Select this drop-down menu to create Headings - H2, H3, H4.

Headings: H1, H2, H3, H4
H1 - Page title is H1; never use H1 in the page body.
H2 - Always begin with Heading 2; H2   is the main header.
H3 - Secondary headers
H4 - Tertiary headers

Heading 2

Heading 3

Heading 4

Underline <span style="text-decoration: underline;">

U

Generally avoided because underlined text can be perceived as hyperlinks.

Text Color

Do not use.

Clear Formatting Tools

Use these tools for copying and pasting to strip styles.

Paste as Text

Before pasting from Word or another editor, click this button to remove styles.

Eraser Tool (Clear Formatting)

Highlight text, and click this button to remove styles.

Special Character

Use with caution to add accent marks or other symbols. Not all special characters work with all browsers.

Increase Indent <p style="padding-left: 30px;">

Generally avoided because browsers/devices do not display the same, and styling/padding should be added at the CSS level.

Other Style Elements

Tables
Tables are only used for data, not for layout.
To make tables responsive, special code is required, so please ask for assistance.

Forms
We use Gravity Forms, a WordPress plugin, to create forms. Please inquire.

FAQs
We use Q and A FAQ and Knowledge Base, a WordPress plugin. Please inquire.

Grid Gallery

We use Grid Gallery, a WordPress plugin, to layout multiple linked images. If you are interested to establish or edit a grid gallery, please inquire.

Search Boxes

Search boxes are used for research pages, such as the eBooks page.

Part 5: Writing Style Guidelines

Consistent Direct Voice

- Use the active voice with a direct, helpful, professional tone.
- Eliminate extraneous adjectives and adverbs.
- Tell users what they can accomplish, not what they can't do.
- Front-load sentences -- provide the conclusion first.
  Users typically see about 2 words for most list items.
  (Source: [Nielsen Norman](#)).
- Avoid using "etc." and phrases such as "and more."
- Avoid using abbreviations and acronyms; spell out acronyms first.
  (See Part 6, Common Terms & Usage.)
- Avoid redundancy, such as "online."
- Avoid non-descriptive link text, such as "click here."
- Avoid jargon, for example Primo and ILLiad. (See Common Terms & Usage.)

Style Elements

- Use headings, paragraphs, and bullets to make content accessible for users with screen readers and make it easy for everyone to quickly scan for relevant information.
- Use bulleted lists to present information quickly, and try to keep bullets to one line.
- Use tables for data, not for layout.
- Avoid overuse of bold and italics.
- Follow guidelines for hyperlinks. (See Part 4, Hyperlinks.)

Grammar & Punctuation

- Contractions are for informal writing and should be avoided.
- Exclamation points are used for informal writing and should be avoided.
- Do not underline text because it implies a hyperlink.
- Put commas inside (before) quotation marks.

Part 6: Common Terms & Usage

A
a.m. preferred; example: 11:00 a.m. (exceptions for automated time systems)

B
business days (use instead of working days)

C
click (do not use, see: select)

D
D2L (spell out before using acronym, see: Desire2Learn)
DataMASTER
Desire2Learn
dialog box (do not shorten to dialog)
drop-down menu (best practice: use instead of pull-down menu)

E
eBook
eJournal
email

F
file name
full time, full-time (hyphenate only when used as a compound modifier: full-time job.)

G
Gmail
Google Mail (do not use, see: Gmail)

H
handheld
hard copy
hard drive
Helpdesk
H Drive (no colon)
homepage
hyphen (use with noun+adjective, e.g. "Portland State University-related functions")

I
ILLiad (do not use)
Interlibrary Loan (best practice)
Internet

L
Library Catalog (best practice)

log in (when used as a verb: with space, no hyphen; login is the preferred noun)
Library (capitalize when referring to PSU Library)

M
Millar Library (use when referring to the building itself; see Portland State University Library)
mobile device (use instead of tablet, phone, iPhone, unless procedures are device-specific)

O
Odin Account (do not use ODIN)

P
PDXScholar (not italicized)
phone numbers: (503) 725-3877
p.m. preferred; example: 11:00 p.m. (exceptions for automated time systems)
Portland State University Library (use before PSU Library, or use "the Library" or "University Library")
printer-friendly
Primo (do not use, see Library Catalog)
pull-down menu (do not use, see: drop-down menu)

S
select (best practice: use instead of click or tap, less device-specific)
streaming media (best practice: use instead of online, video)

T
tablet (do not use, see: mobile device)
tap (do not use, see: select)
training (do not use, see: workshops)

U
University (capitalize when referring to PSU)
University Library
username

V
voicemail

W
web browser
web address
webpage
website
Wi-Fi
working days (do not use, see: business days)
workshops (best practice: use instead of training)

Appendix 1: Resources

[Accessibility Guide](#)

[Chicago Manual of Style](#)

[Editorial Style Guide](#) (University Communications)

[Identity Standards](#) (University Communications)

[Oxford English Dictionary](#)

[The Elements of Style](#) (William Strunk Jr.)

[Nielsen Norman Group Reports](#) / [Articles](#)

[A Book Apart series](#):

- Mobile First (Luke Wroblewski)
- Content Strategy for Mobile (Karen McGrane)
- Responsive Web Design (Jeremy Keith)
- Responsible Responsive Design (Scott Jehl)
- Color Accessibility Workflows (Geri Coady)

Appendix 2: Website Standards

Body font: 16px = 1em

Headings	Font-family: Georgia, Sans-serif
H1 (Page Title)	Font-size: 2em
H2	Font-size: 1.5em
H3	Font-size: 1.17em
H4	Font-size: 1em
Paragraph	Font-family: Lato, Arial, Sans-serif Font-size:1em
Blockquote	Font-size: 1.25em
Breadcrumb	Font-size: .75em
Caption	Font size: .875em

These are the main font styles. We have many other standards at the CSS level (bullet style, horizontal rule style, padding, margins). If the standards are not working for your content, please let us know, and we can discuss options.