

Documentation Style Guide

Use this workbook to establish your documentation rules, approved examples and terminology. Replace bracketed prompts with adopted house style. Add one record per topic and use the final checklist when reviewing a draft.

Complete bracketed fields with approved information. Duplicate modules and rows as needed; record the reason for any section marked not applicable.

Document [ID and revision] **Owner** [Role] **Scope** [Organization, site or product]

Effective date [Date] **Approval** [Controlled record] **Next review** [Date or trigger]

About this guide

Guide decision	House convention
Content and audience	[Products, channels, document types and reader groups]
Reference precedence	[Order of project rules, house guide and adopted references]
Rule changes and exceptions	[Request route, reviewer, decision record and effective version]
Scope exclusions	[Content governed elsewhere and reference]

Voice tone and principles

Context or reader need	Voice and tone rule	Approved example and rationale
[Task instructions]	[Person, voice and tone]	[Recommended wording and source]
[Error or sensitive message]	[Tone, accessibility and inclusion rule]	[Example and exception]
[Global or translated content]	[Clarity and localization guidance]	[Example and rationale]

Language and grammar

Give each rule its own identifier so editors can cite it in feedback. Preserve explicit exceptions.

Rule ID and topic	Required convention	Exception and example
[Capitalization]	[Rule and scope]	[Recommended / Not recommended pair]
[Tense person or voice]	[Rule and obligation strength]	[Exception and approved pair]
[Acronyms or contractions]	[First-use and subsequent-use rule]	[Approved pair]

Punctuation

Mark or usage	Rule and boundary case	Approved example pair
[Comma]	[House rule and exceptions]	[Recommended / Not recommended]
[Colon or semicolon]	[When to use]	[Example pair]
[Quotation marks or dash]	[Rule for prose and UI quotations]	[Example pair]

Formatting and organization

Element	Formatting and construction rule	Example or exception
Headings and lists	[Hierarchy, capitalization and list grammar]	[Approved example]
Procedures	[Step boundaries, prerequisites and results]	[Approved step example]
Tables and figures	[Header, caption and alternate-text rules]	[Approved example]
Numbers dates times and units	[Exact formats and locale treatment]	[Approved values]

Notices

Signal word	Meaning and placement	Approved example
[Adopted notice type]	[Meaning, permitted use and position before a step]	[Approved wording]
[Another adopted type]	[Meaning and misuse to avoid]	[Approved wording]

UI code and interface elements

Element	House convention	Exact example
Button menu or field	[Formatting and exact-label treatment]	[Approved UI label in a sentence]
Inline code and filenames	[Typeface, case and punctuation]	[Approved code or path]
Command or code block	[Prompt, line breaks, comments and output rules]	[Approved sample reference]
Placeholder	[Syntax, substitution instructions and sensitive values]	[Approved placeholder]

Links and cross references

Link situation	Rule	Approved text and target
Internal article	[Descriptive text and section linking]	[Text, destination and anchor]
External source	[Attribution and link behavior]	[Approved example]
Repeated task or reference	[When to link rather than repeat]	[Approved cross-reference]

Word list and terminology

Keep entries alphabetical, with symbols and numbers first. Record usage guidance rather than inventing definitions.

Term and exact case	Status	Use instead	Context and first use
[Term]	[Use / restricted / avoid]	[Preferred alternative or none]	[Meaning or usage; source]
[Product name]	[Approved spelling]	[None]	[Trademark or capitalization rule]
[Acronym]	[Approved use]	[Expansion]	[First-use rule and context]

Review checklists

Draft review record

Draft and version	Author and reviewer	Audience and publication channel
[Document link and revision]	[Roles or names]	[Reader, task and channel]

Check only rules adopted in this guide. Add the rule ID and evidence where a draft needs correction.

Review area	Yes no or not applicable	Rule and correction
Voice and grammar match the intended audience	[Result]	[Rule ID; affected text]
Punctuation and numbers follow house conventions	[Result]	[Rule ID; correction]
Headings steps tables and notices use the required forms	[Result]	[Rule ID; correction]
UI labels code and placeholders are exact	[Result]	[Rule ID; correction]
Links are descriptive and point to the intended content	[Result]	[Rule ID; checked destination]
Terminology and product names match the word list	[Result]	[Term and correction]

Rule change or exception request

Request field	Complete before review
Rule and affected content	[ID, proposed wording and examples]
Reason and alternatives	[Reader impact, consistency and localization effects]
Review decision	[Approved, rejected or temporary exception; rationale]
Follow through	[Effective version, affected pages and communication]

Guide review sign off

Reviewer	Date and decision	Unresolved rules and next review
[Editorial authority]	[Date and approval reference]	[Open decisions and owner]