



WRITTEN DOCUMENTATION

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OVERVIEW: STYLE GUIDE

OVERVIEW: STYLE GUIDE

SCOPE

Although this style guide is designed to cover most use cases for written documentation at PERS, it is not comprehensive of every situation you could encounter.



Using this style guide is not intended as a substitute for taking dedicated training on using InDesign. You are encouraged to seek professional development on InDesign to bolster your skillset and allow you to handle fringe use cases not covered in this style guide.

USE CASES

This Style Guide serves multiple purposes:

1. Firstly, the design elements can be used as they are. All design elements discussed in this style guide should be present in the template for your use. If you are just getting started in InDesign, using the pre-built style elements is recommended.
2. Secondly, the Appendix in this style guide can serve as inspiration for you to create your own customized style elements. You will find [links](#) throughout the style guide which will take you to the Appendix where you can get a “look under the hood” of a design element.

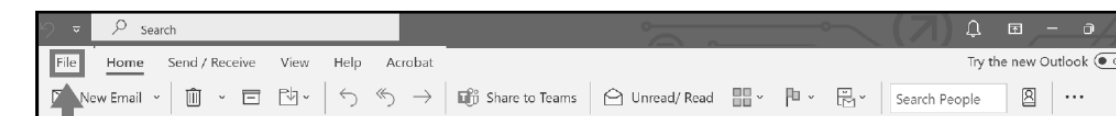
SUBHEADERS

Outlook Email

Create Email Signatures

Before creating an email signature check with your manager to see if there are any requirements that need to be included with your email signature.

1. From your Microsoft Outlook inbox, click on the File menu option from the ribbon bar in the top left corner of your inbox.



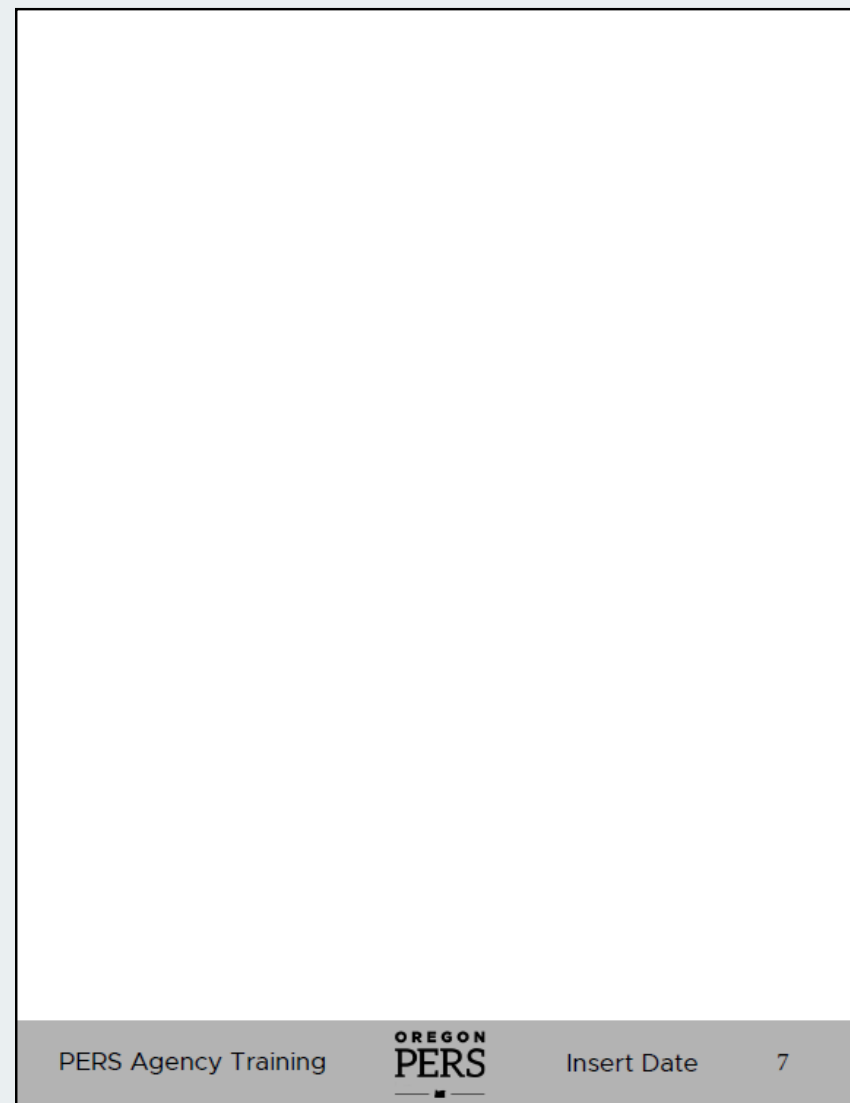
Subheaders should be used for separating out subsections of a job aid, such as Create Email Signatures within the Outlook Job Aid.

In order to create your subheader, type in text into a new text box and then select [“Subheader”](#) from the Paragraph Styles Panel with the text box selected.



TEMPLATE

OVERVIEW



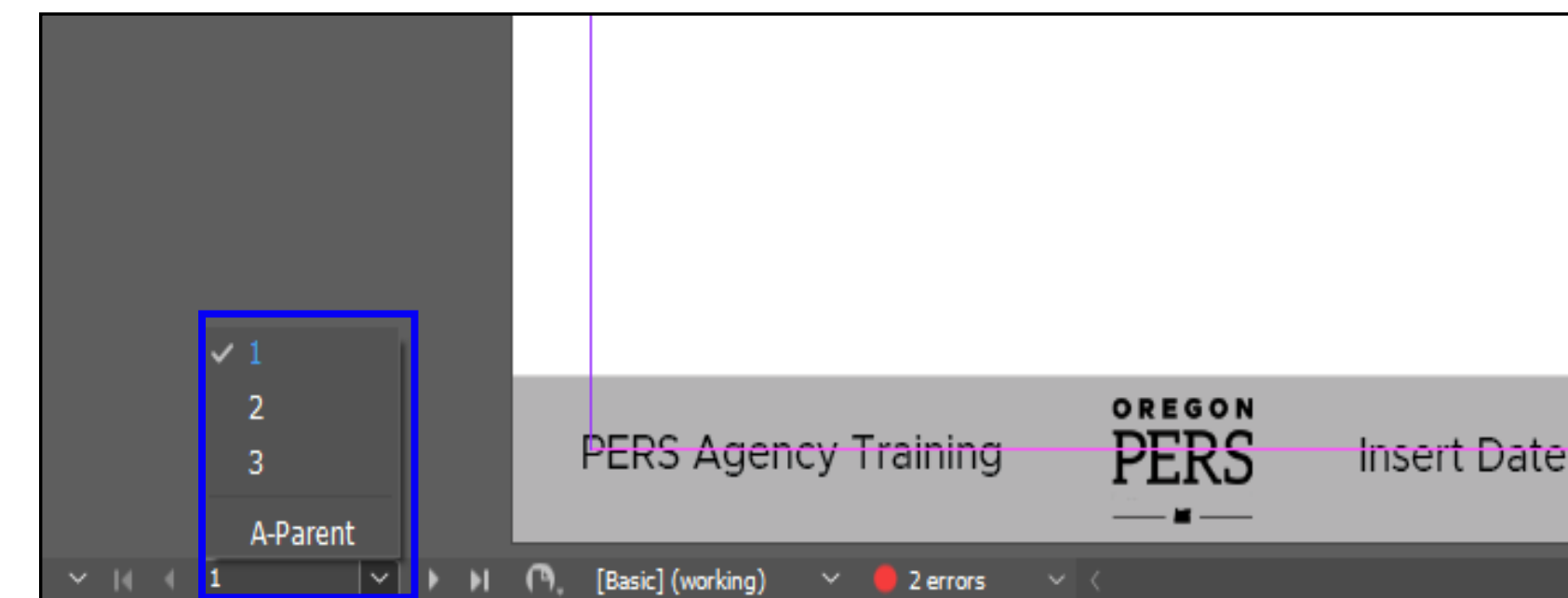
[The Documentation Template](#) is designed to be flexible and meet a variety of use cases: a 50+ page technical manual involving multiple user types and a 6-page job aid on how you can source and upload a Workday Profile photo.

Here is a quick glance of what is provided in the template:

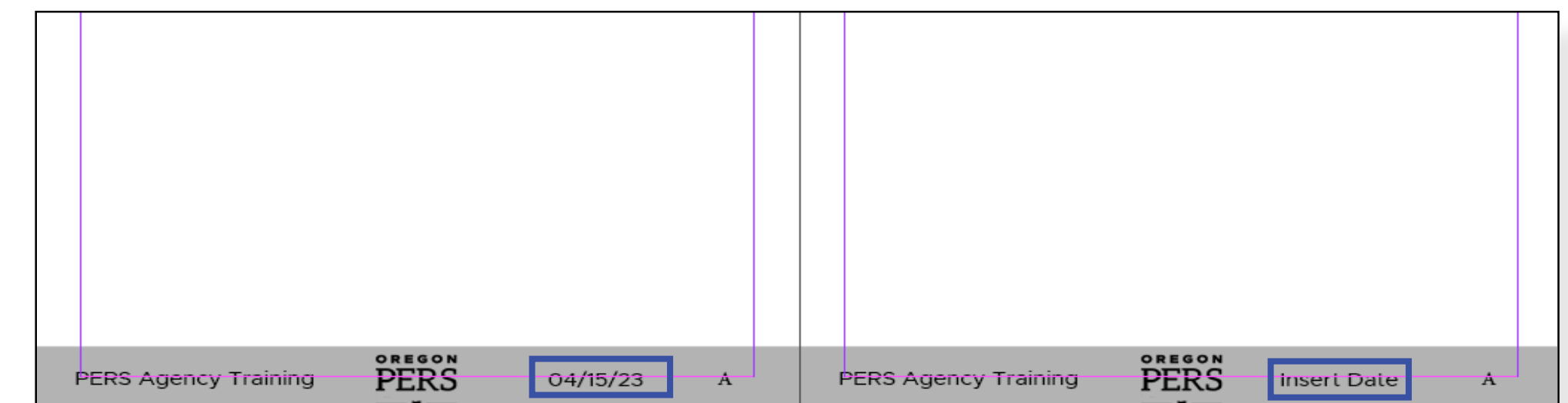
- Cover Page for Lengthy Documentation
- Table of Contents for Lengthy Documentation
- Page with Header section for Short Documentation
- Standard page for the body of the document (as seen above)
- Paragraph Styles
- Shapes

DATE IN FOOTER

Before publishing a new version of documentation, you will need to edit the parent page to reflect the day it was last edited.



At the bottom right corner of the screen, open the page drop-down menu and select A-Parent.

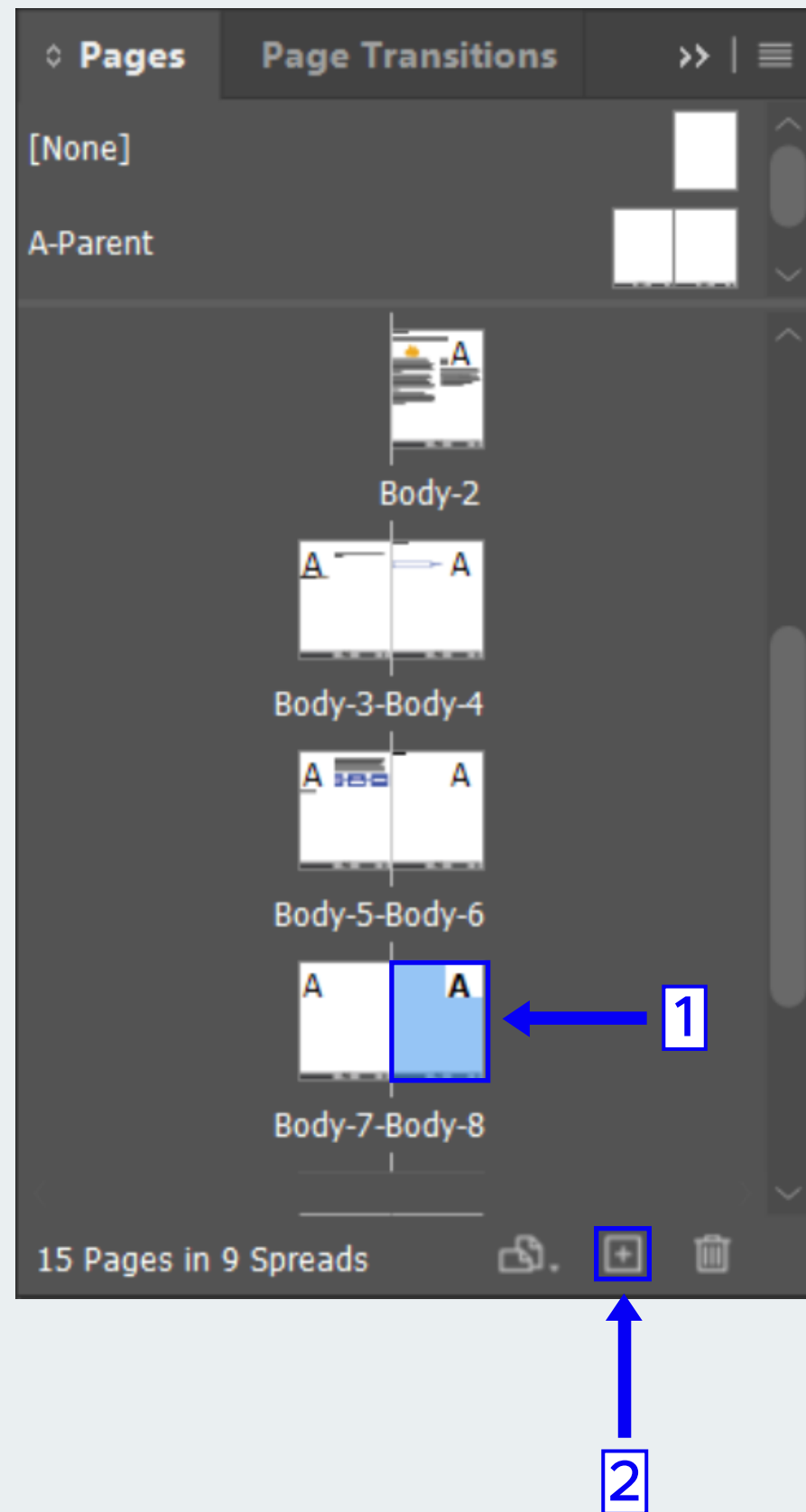


Type in the date you are creating or revising the job aid in both pages of the spread. Move the text frame along the x-axis if needed

TEMPLATE

ADD PAGE

1. Select the page next to which you wish to insert a new page



2. Press the “+” Button to create a new page.

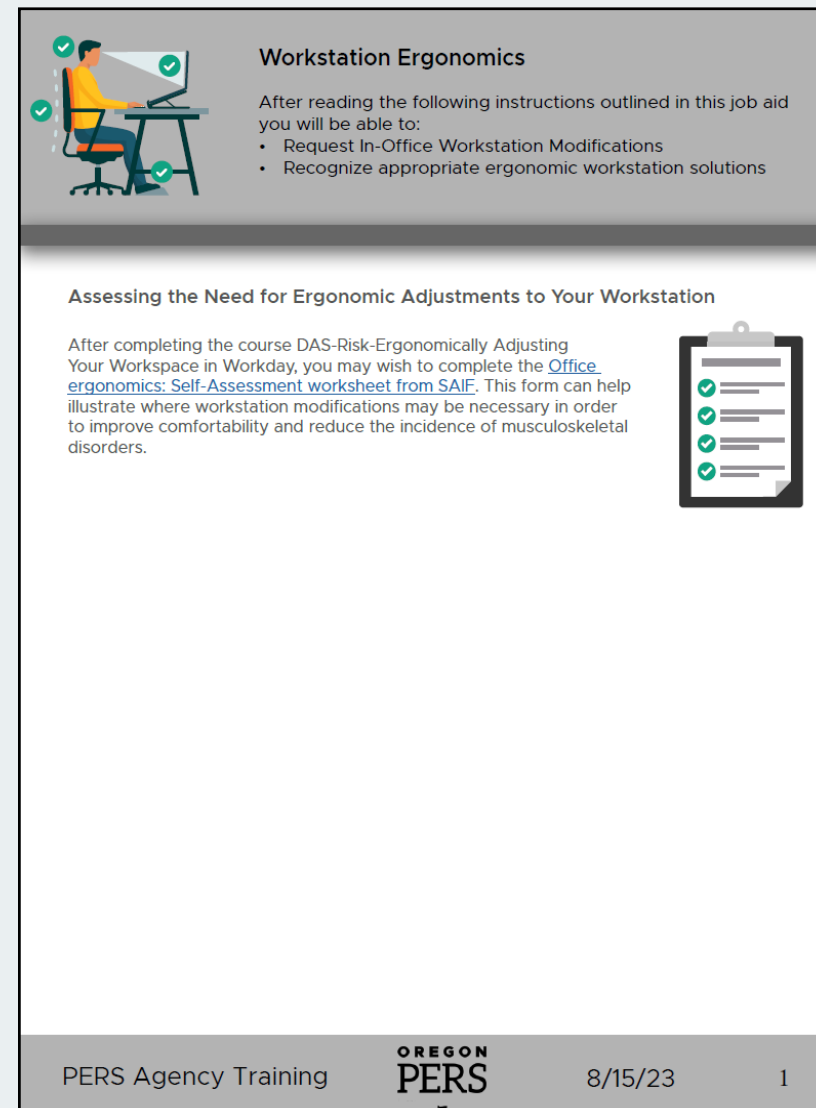
LEARNING SUPPORT LINK

Further Questions

If you have further questions on this job aid, or need any other support from the training team, [create a Help Case in Workday and request learning support.](#)

All Agency Training job aids should end with instructing learners to fill out a learning support request in Workday if they have further questions-as is the case in the documentation template.

SHORT DOCUMENTATION



For documentation under 10 pages in length and/or involving a single user type, it is recommended that you use page “Short-1” instead of “Long-i” and “Long-ii”. Of course, neither the page length or number of user types are hard and fast rules. Use your own judgement on which template to use.

Page “Short-1”, intended for short documentation like job aids, features a title, the documentation’s objectives, and a placeholder for an associated graphic.

Skip ahead to the [Short Documentation Section](#) to proceed with this option.

If you are unsure of how many pages or how many user types your documentation will have, you can always return to this procedure after you have spent time building out the body of your documentation.

LENGTHY DOCUMENTATION

Contents	
Overview of Work out of Class	
Work out of Class Definition	1
Advantages and Disadvantages of Work out of Class	2
Alternatives to Work out of Class	3
Procedure for Requesting WOC Approval using DocuSign	
Prerequisites to Filling out the Form	4
Locating the Work Out of Class (WOC) Form	5
Designating the appropriate signing roles for the WOC Form	7
Filling in the WOC Form for Review	10
Reviewing WOC Request Using DocuSign	
HR Review and Signing	28
Signing as the Appointing Authority	29
Signing as the WOC Requesting Manager	34
Signing as the Employee	40
Declining to Sign	46
Appendix	
Alternate Way to Access Documents: Input Security Code	49
Further Questions	51

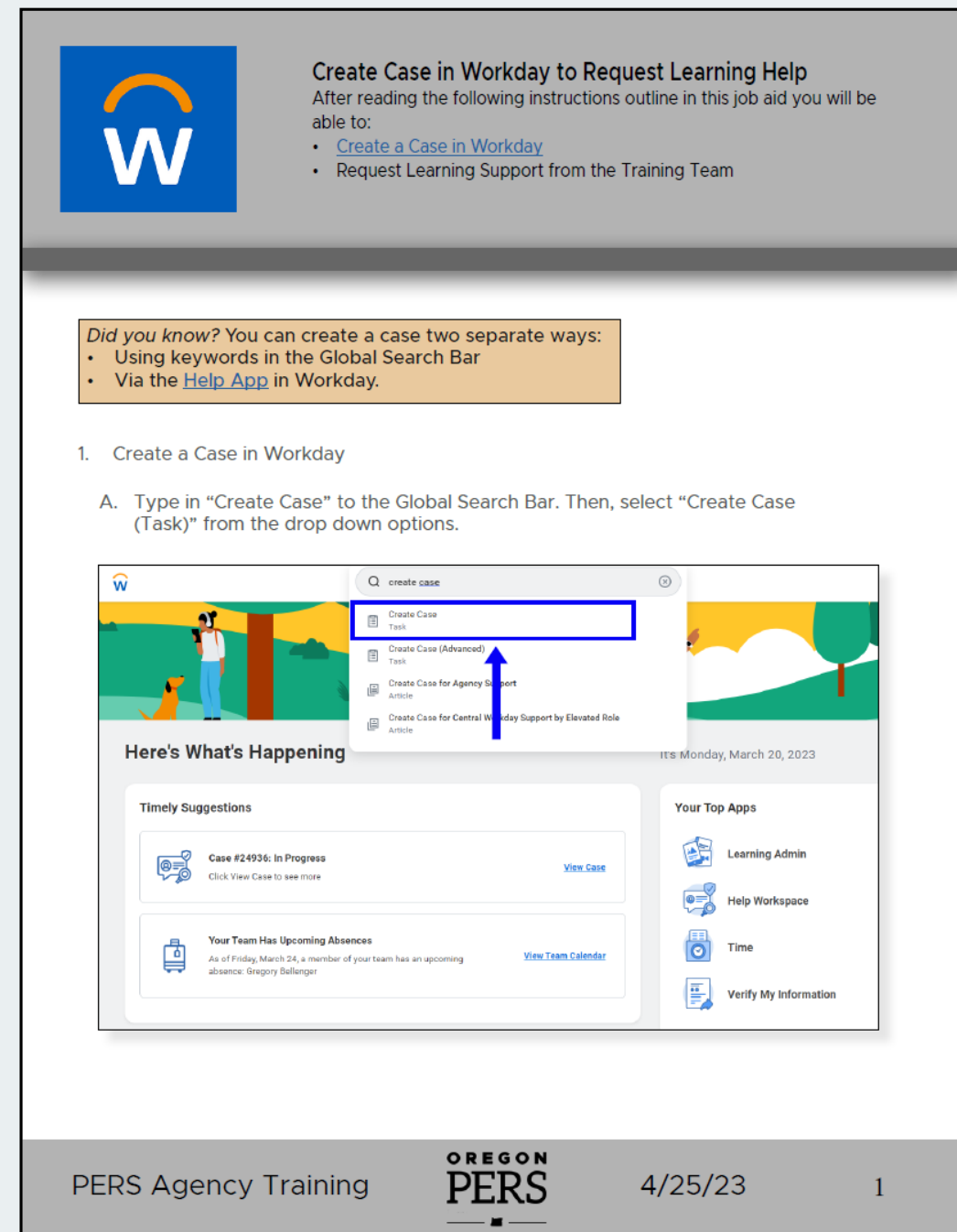
For documentation over 10 pages in length and/or involving multiple user types, it is recommended you use pages “Long-i” and “Long-ii”, instead of page “Short-1”, in the template.

Pages “Long-i” and “Long-ii”, intended for longer documentation like procedural manuals, contain a cover page listing the documentation’s objectives, and most importantly a Table of Contents containing clickable hyperlinks.

Skip ahead to the [Lengthy Documentation Section](#) to proceed with this option.

SHORT DOCUMENTATION

OVERVIEW



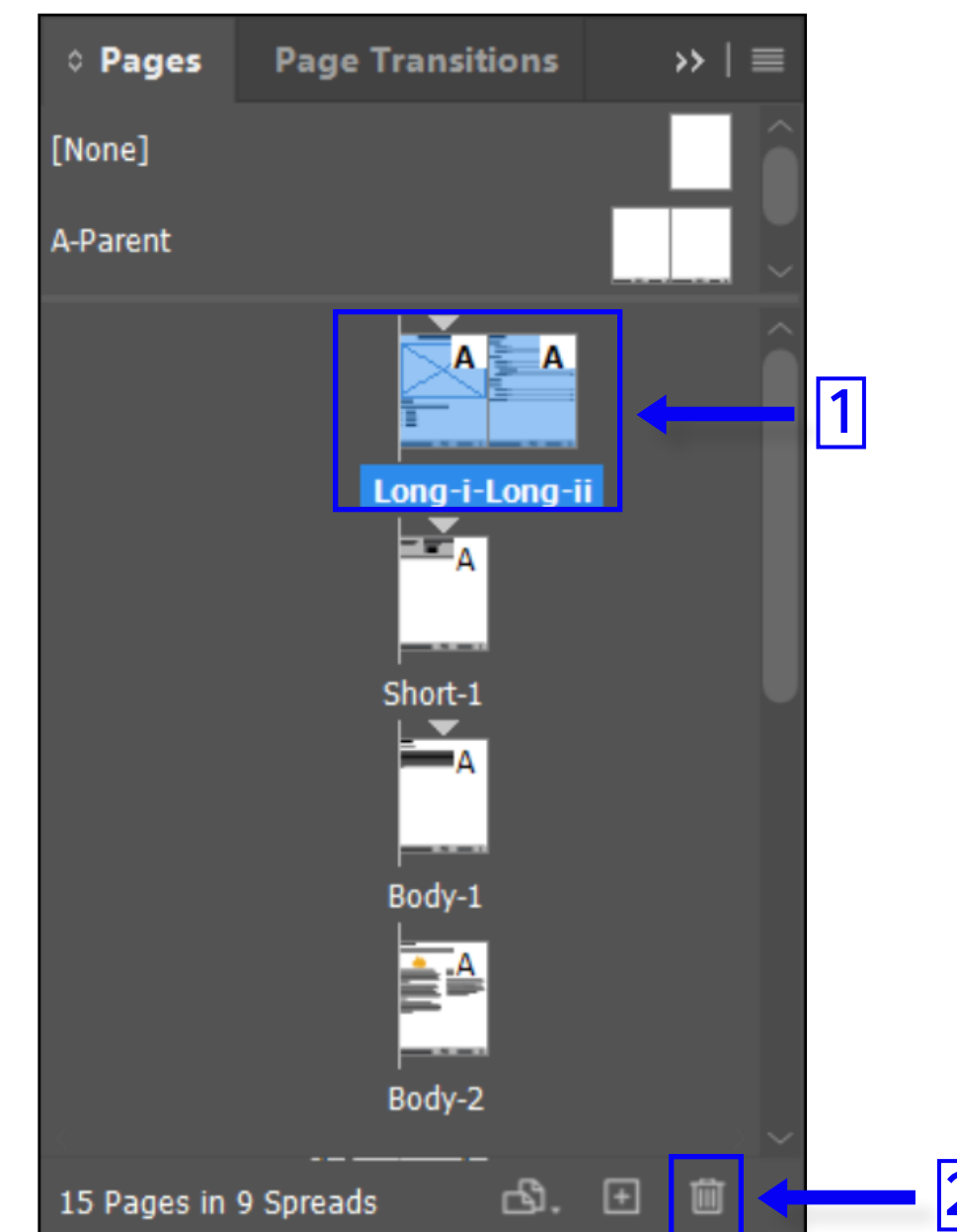
Page “Short-1”, featuring a header with a graphic placeholder, title, and objectives is designed to be used for job aids fewer than 10 pages and/or involving a single user type.

In order to explain “user type”, we will use an example from the [Work out of Class DocuSign Job Aid](#). WOC Managers, Appointing Authorities, rank and file Employees, and Human Resources all play a role in the process of completing a Work out of Class form using DocuSign. Since each user type has their own set of instructions in the user manual, the Table of Contents would be more appropriate because they can skip to the set of instructions that are relevant to them.

DELETING UNEEDED PAGES

Now that you have determined you don’t need the Table of Contents or Cover Page, delete pages i-ii and reset the document’s page numbering:

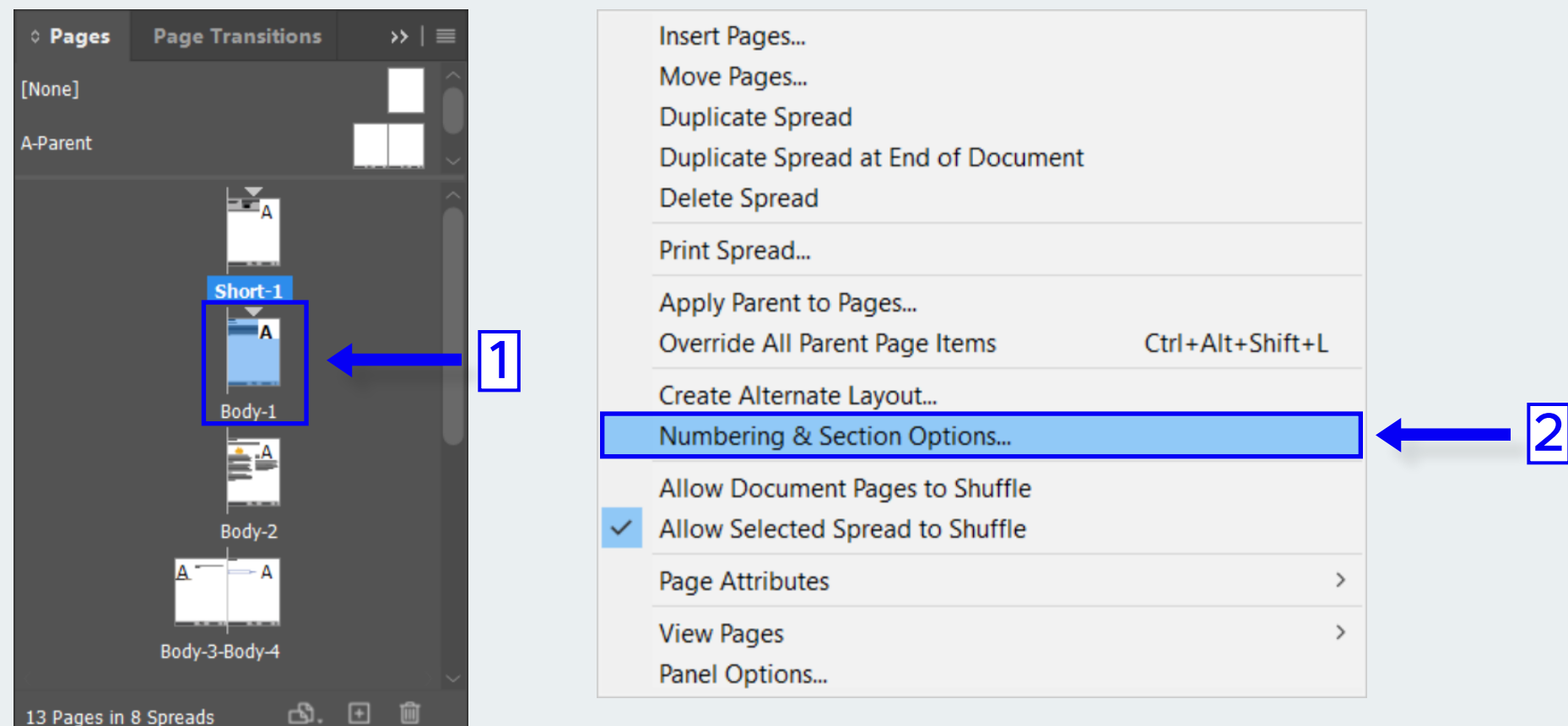
1. From the Pages Panel, select both page i and ii at the same time by using the Shift button



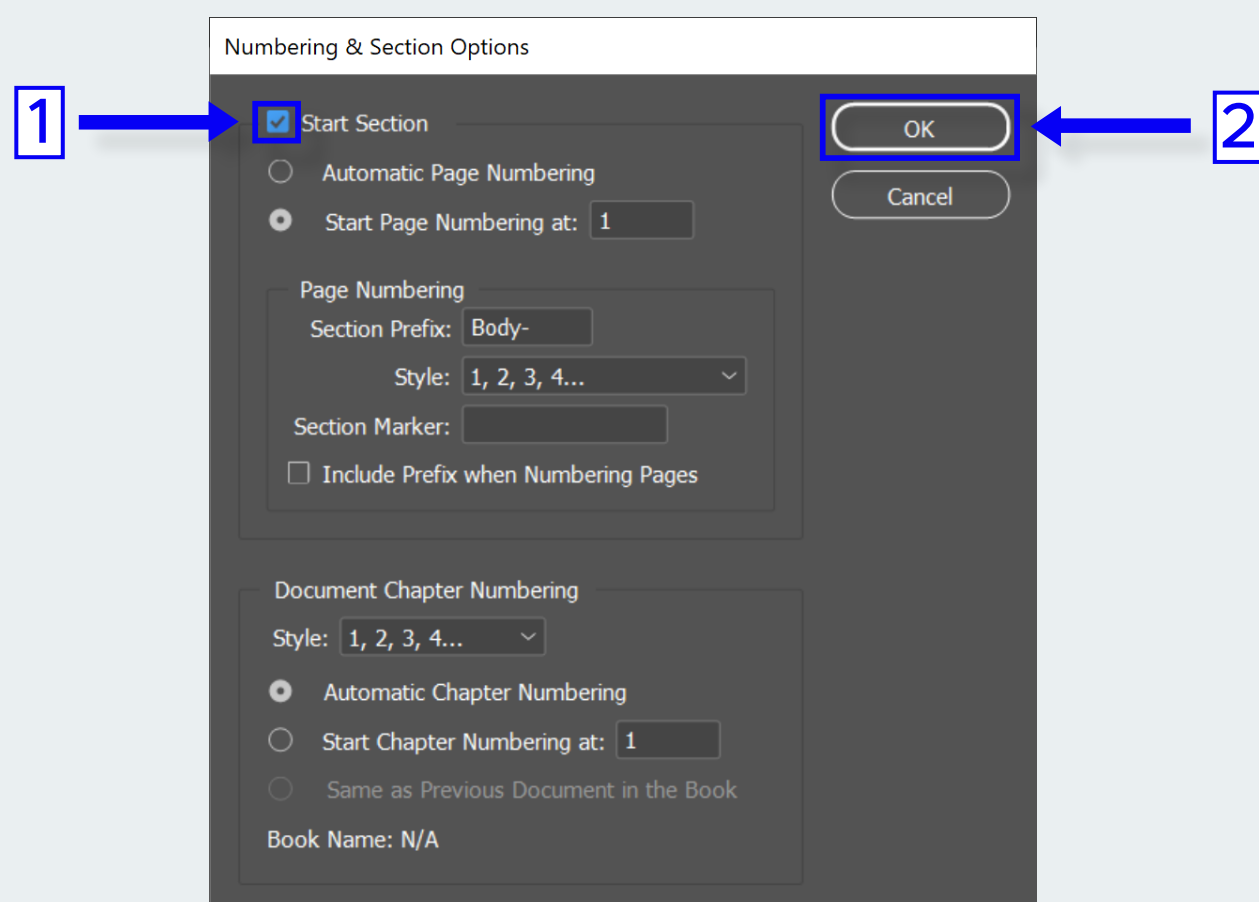
2. Select the trash icon within the Pages Panel

SHORT DOCUMENTATION

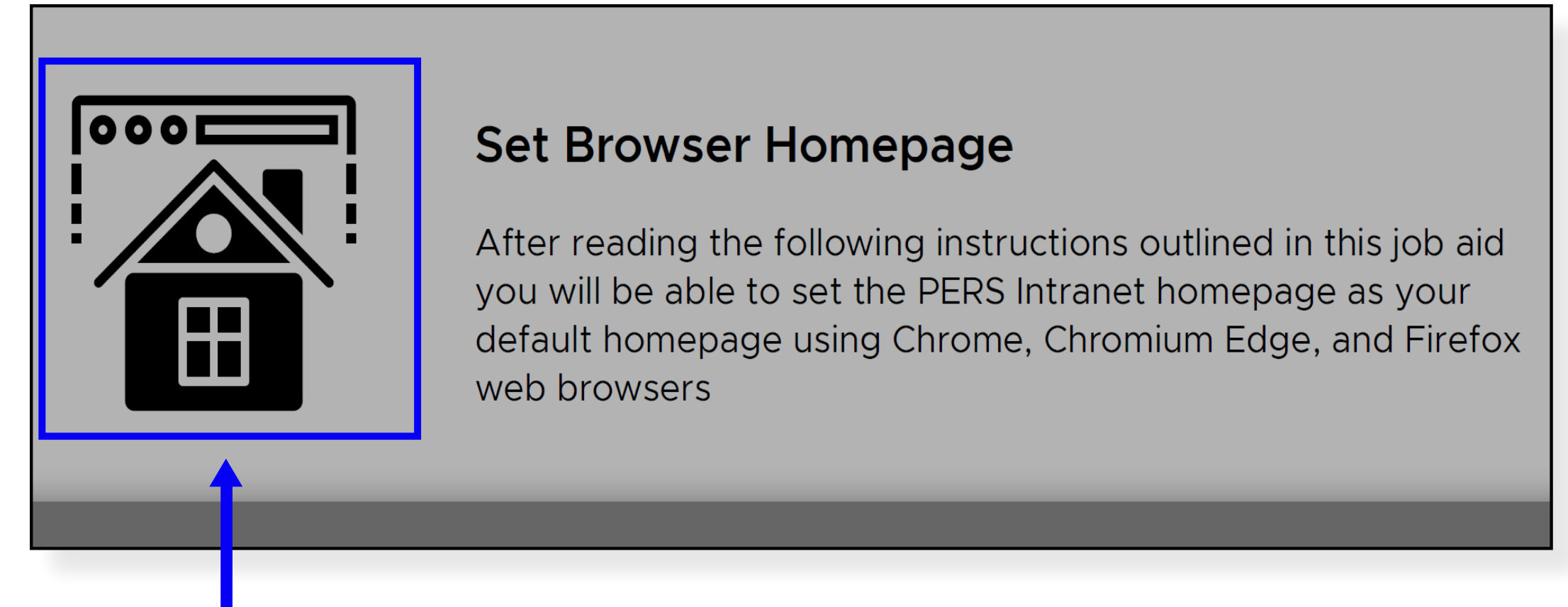
3. Right Click on the page “Body-1” and select “Numbering and Section Options” from the dialog box



4. Uncheck the box “Start Section”. Press “OK”.



GRAPHIC




Place a sourced vector or image within the rectangle frame of page “Short-1”.

You may wish to use Adobe Stock, Creative Commons photos, Vecteezy, flaticon, etc. to source a vector or high-resolution png file.

SHORT DOCUMENTATION

OBJECTIVES




Discussion Guide for Manager 1:1

After following the instructions outlined in this Discussion Guide you will be able to articulate your manager's expectations during your first six months at PERS.

Articulate the job aid's objective(s) by editing the placeholder objectives in the header of this template.


Generally, the terms “understand” or “know” should not be used when writing objectives. For more information on writing measurable objectives, check out [this article from the University of Arkansas](#).



Set Browser Homepage

After reading the following instructions outlined in this job aid you will be able to set the PERS Intranet homepage as your default homepage using Chrome, Chromium Edge, and Firefox web browsers

For one objective, type out a sentence. Delete the text frame containing bullet points.




Create Case in Workday to Request Learning Help

After reading the following instructions outlined in this job aid you will be able to:

- Create a Case in Workday
- Request Learning Support from the Training Team

For multiple objectives, use bullet points. These bullet points are styled using the paragraph style: “[Objectives-Header](#)”


TITLE



Set Browser Homepage

After reading the following instructions outlined in this job aid you will be able to set the PERS Intranet homepage as your default homepage using Chrome, Chromium Edge, and Firefox web browsers

There should only be *one* Title per document, which describes the documentation's topic in broad strokes; usually only a few words.



Workday Absence Request

After reading the instructions outlined in this job aid you will be able to:

- Access Workday
- Submit an absence request using the Time Off (Absence) App

Generally, you will simply edit the title present in the Header of this template. Otherwise, you can select the “[Title](#)” style from the Paragraph Panel.

LENGTHY DOCUMENTATION

LENGTHY DOCUMENTATION

OVERVIEW

Contents	
Meeting Etiquette	
Canceling	1
Avoid Distractions	1
Practice Active Listening	2
Camera On/Off	3
Recording Meetings	4
MS Teams & Cisco Softphones	
Internal Communication	5
Interference	5
Accessing Appropriate Documentation for MS Teams	
Microsoft Documentation versus Third Party Documentation	6
Documentation to Get you Started	6
Searching for Documentation on Microsoft Support	7
Further Questions	9

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Pages “Long-i” and “Long-ii”, featuring a Cover Page and Table of Contents, are typically intended for documentation which is over 10 pages long and/or involves multiple user types.

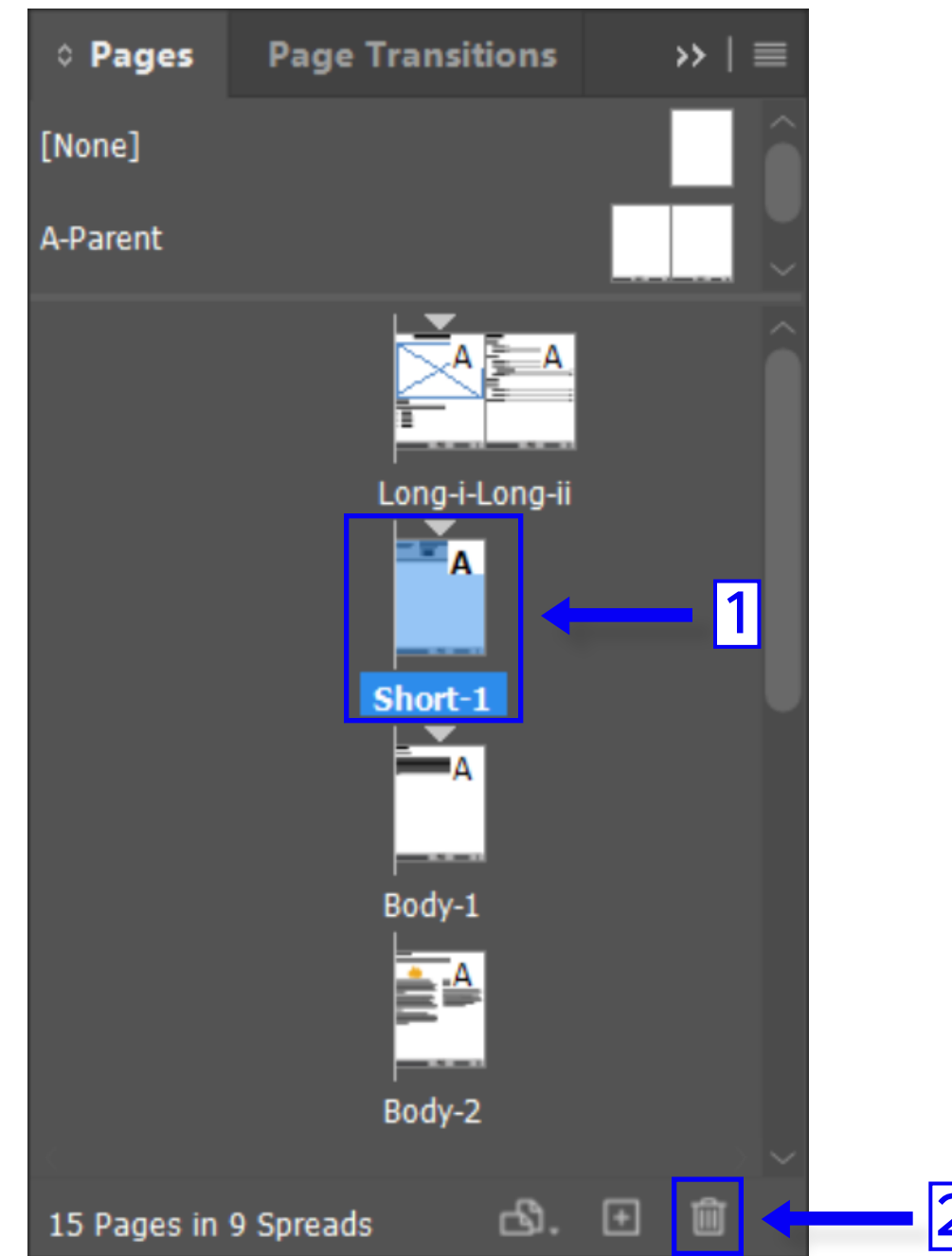
When the documentation is lengthy or involves several different user types, the navigability provided by the Table of Contents is crucial to saving the user time and frustration.

Also, the Cover Page gives space for more objectives than the “Short-1” page.

DELETING UNEEDED PAGE

Now that you have determined you will be using the long documentation format, delete the page “Short-1”:

1. From the Pages Panel, select page “Short-1”

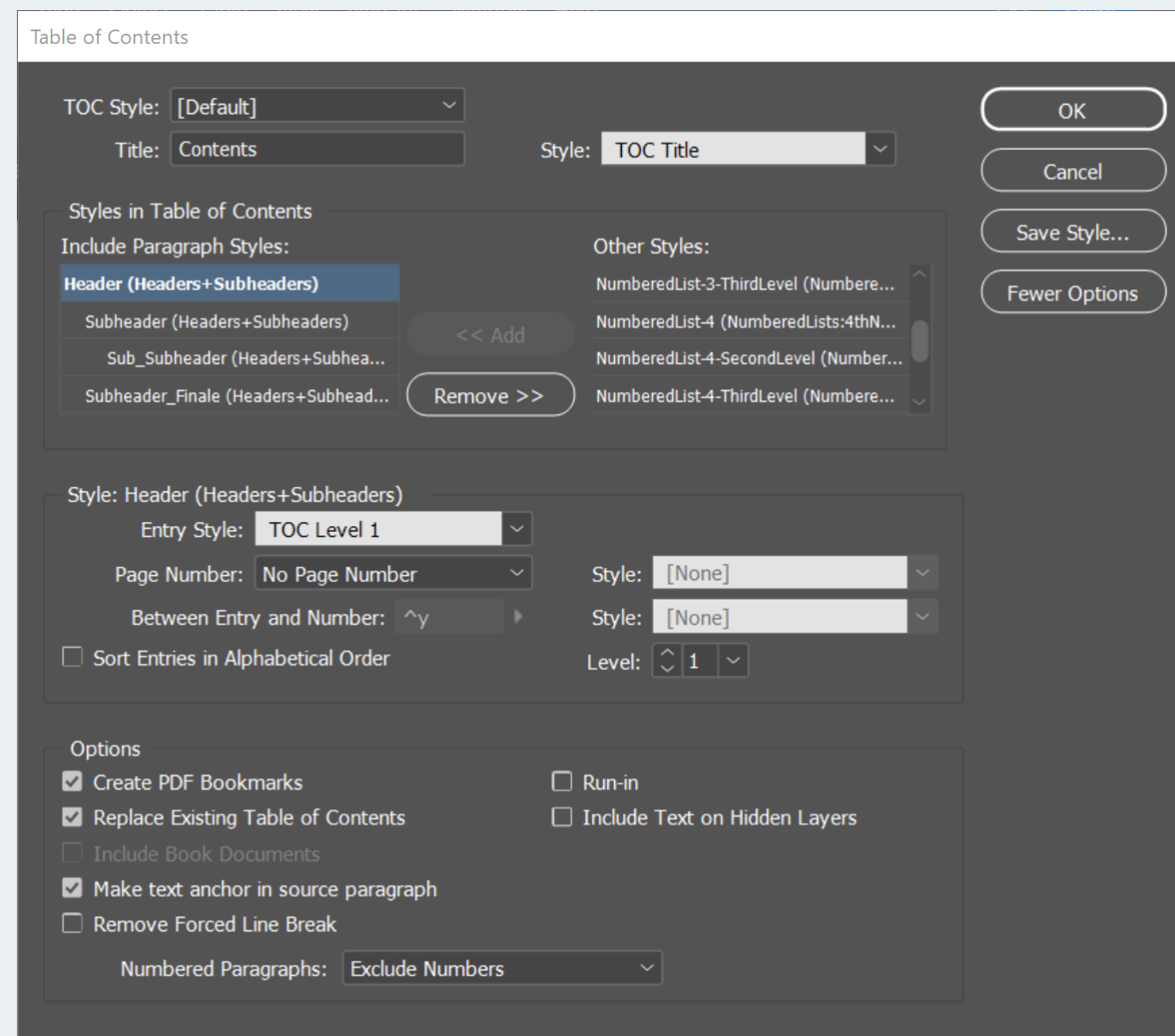


2. Select the trash icon within the Pages Panel

LENGTHY DOCUMENTATION: TABLE OF CONTENTS

TOC: PARAGRAPH STYLES

Paragraph Styles, besides allowing us to [quickly and easily maintain design consistency across a piece of documentation](#), are the building blocks for a Table of Contents in InDesign. It is important to label your text frames correctly in the body of your document so they show up (correctly) in the Table of Contents.



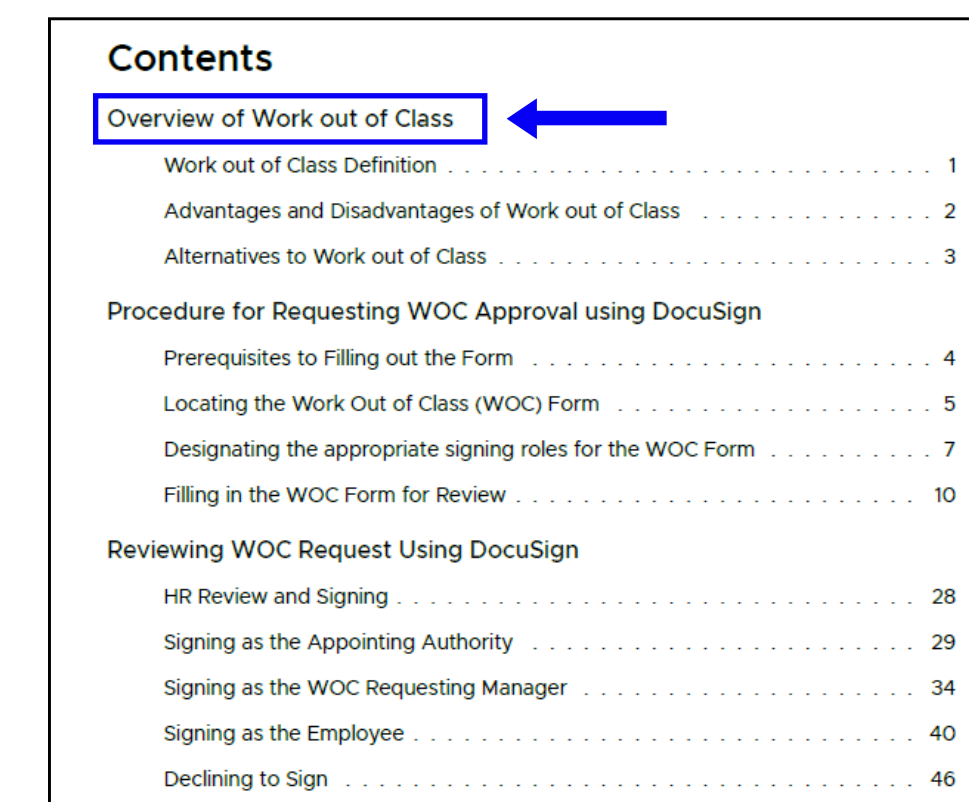
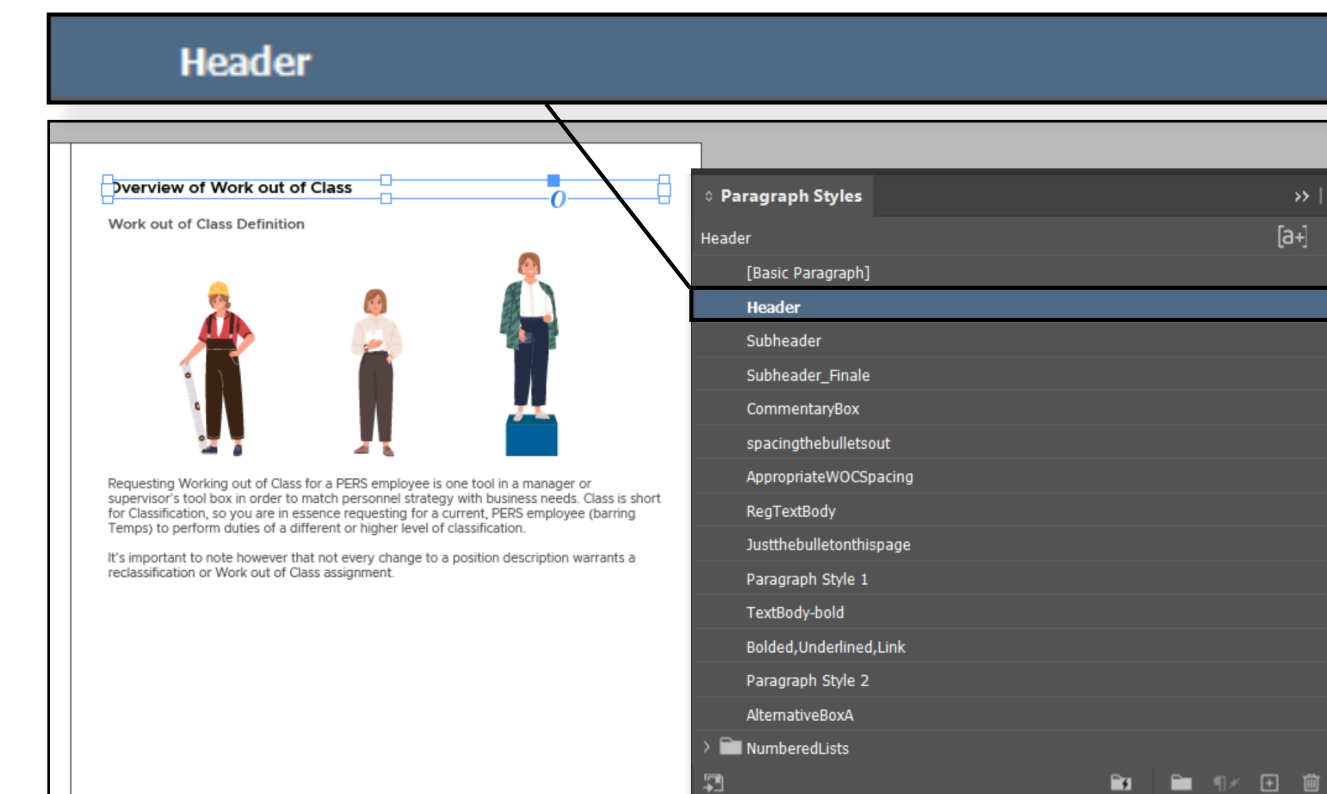
The following paragraph styles are used in the Table of Contents; click to be redirected to information on a particular paragraph style:

- [Header](#)
- [Subheader](#)
- [Sub_Subheader](#)
- [Subheader_Finale](#)

HEADERS

A “Header” not only improves the skimmability of documentation, but is also the first building block for the Table of Contents.

Below is an example of how labeling the text frame “Overview of Work out of Class” as a “Header” paragraph style in the body of the InDesign Document, in turn displays that header in the Table of Contents.



LENGTHY DOCUMENTATION: TABLE OF CONTENTS

SUBHEADERS

Contents	
Meeting Etiquette	
Canceling	1
Avoid Distractions	1
Practice Active Listening	2
Camera On/Off	3
Recording Meetings	4
MS Teams & Cisco Softphones	
Internal Communication	5
Interference	5
Accessing Appropriate Documentation for MS Teams	
Microsoft Documentation versus Third Party Documentation	6
Documentation to Get you Started	6
Searching for Documentation on Microsoft Support	7
Further Questions	9

Above is an example of how labeling the text frame “Canceling” as a “Subheader” in the body of the [Teams Job Aid](#) in turn displays that text in the Table of Contents.

INDENTED SUBHEADERS

Contents	
Header #1	
Subheader #1	1
Subheader #2	1
Header #2	
Subheader #1	2
Subheader #2	3
Sub_Subheader	4
Subheader #3	4
Header #3	
Header #4	
Subheader #1	8
Subheader #2	9
Further Questions	11

Although “Sub_Subheader” has the same style as the other subheaders within the body of the InDesign document, it is [programmed in the Table of Contents to be indented](#)- as shown above. This allows you to chunk relevant content together further.

One example of using the “Sub_Subheader” paragraph style is from the [Outlook job aid](#), where Security Levels Explained is indented under Create Email Signatures because one may wish to add security levels to their email signatures when communicating externally.

LENGTHY DOCUMENTATION: TABLE OF CONTENTS

FURTHER QUESTIONS

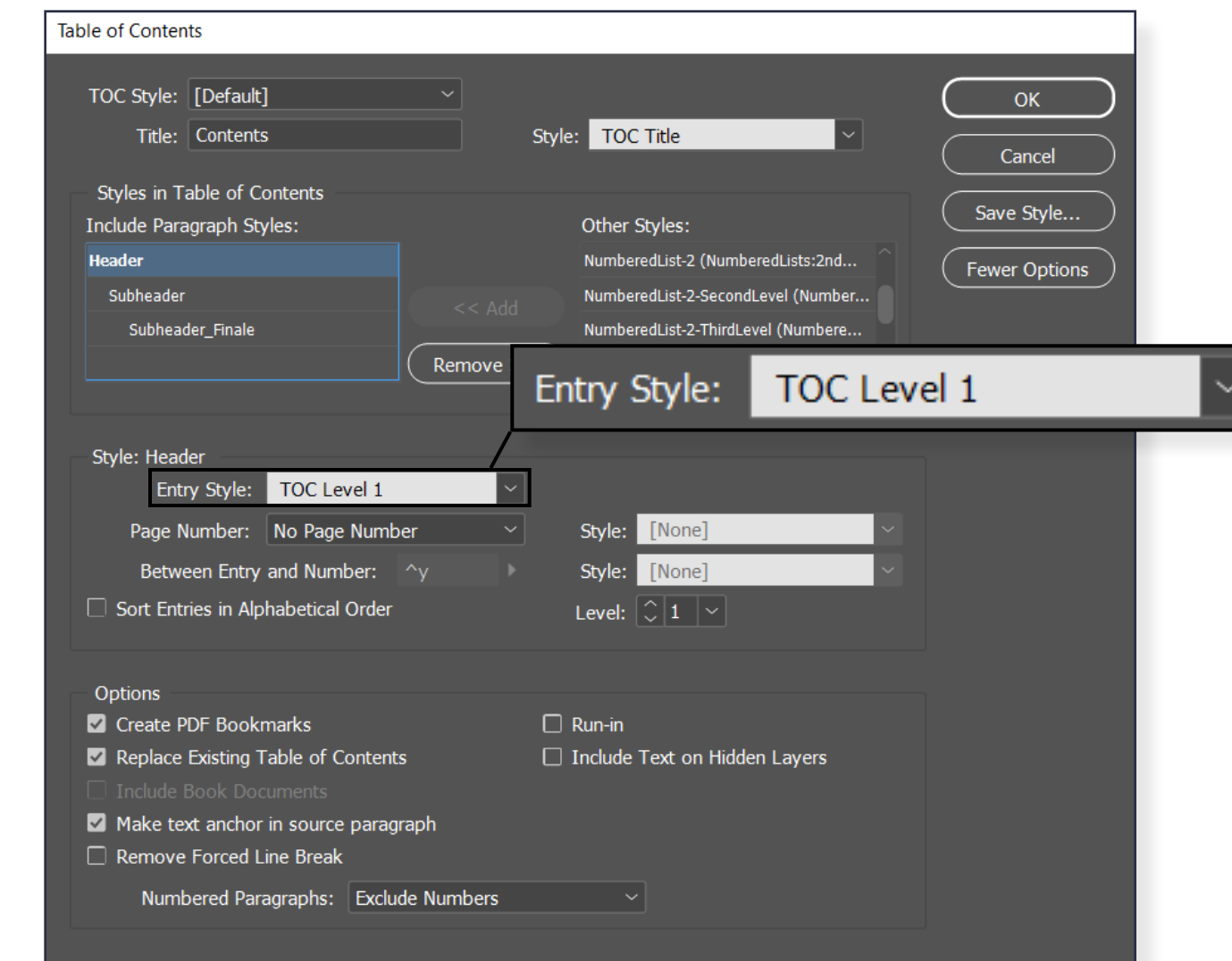
Contents	
Overview of Work out of Class	
Work out of Class Definition	1
Advantages and Disadvantages of Work out of Class	2
Alternatives to Work out of Class	3
Procedure for Requesting WOC Approval using DocuSign	
Prerequisites to Filling out the Form	4
Locating the Work Out of Class (WOC) Form	5
Designating the appropriate signing roles for the WOC Form	7
Filling in the WOC Form for Review	10
Reviewing WOC Request Using DocuSign	
HR Review and Signing	28
Signing as the Appointing Authority	29
Signing as the WOC Requesting Manager	34
Signing as the Employee	40
Declining to Sign	46
Appendix	
Alternate Way to Access Documents: Input Security Code	49
Further Questions	51

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“Further Questions”, where a link to a job aid is provided on how to request learning support through Workday, is labeled with the Paragraph Style “Subheader_Finale” so that it is styled differently from the other subheaders in the Table of Contents.

To learn more about building a Table of Contents using Paragraph styles, check out [this video](#).

TOC: STYLING



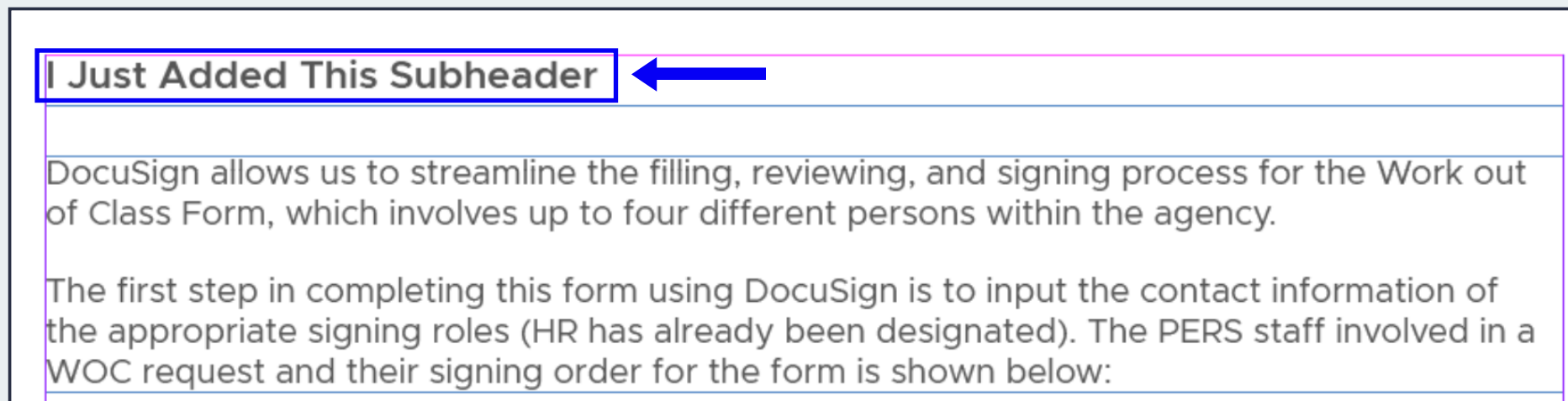
The styling of the Table of Contents should happen automatically. However, if you need to edit the following elements in the TOC, please edit the corresponding entry (paragraph) style-as can be observed within the Table of Contents Dialog Box:

- Title (“Contents”): [TOC Title](#)
- Headers: [TOC Level 1](#)
- Subheaders: [TOC Level 2](#)
- Further Question Subheader: [TOC Level 3](#)
- Indented Subheaders: [TOC Level 4](#)

LENGTHY DOCUMENTATION: TABLE OF CONTENTS

TOC: UPDATING

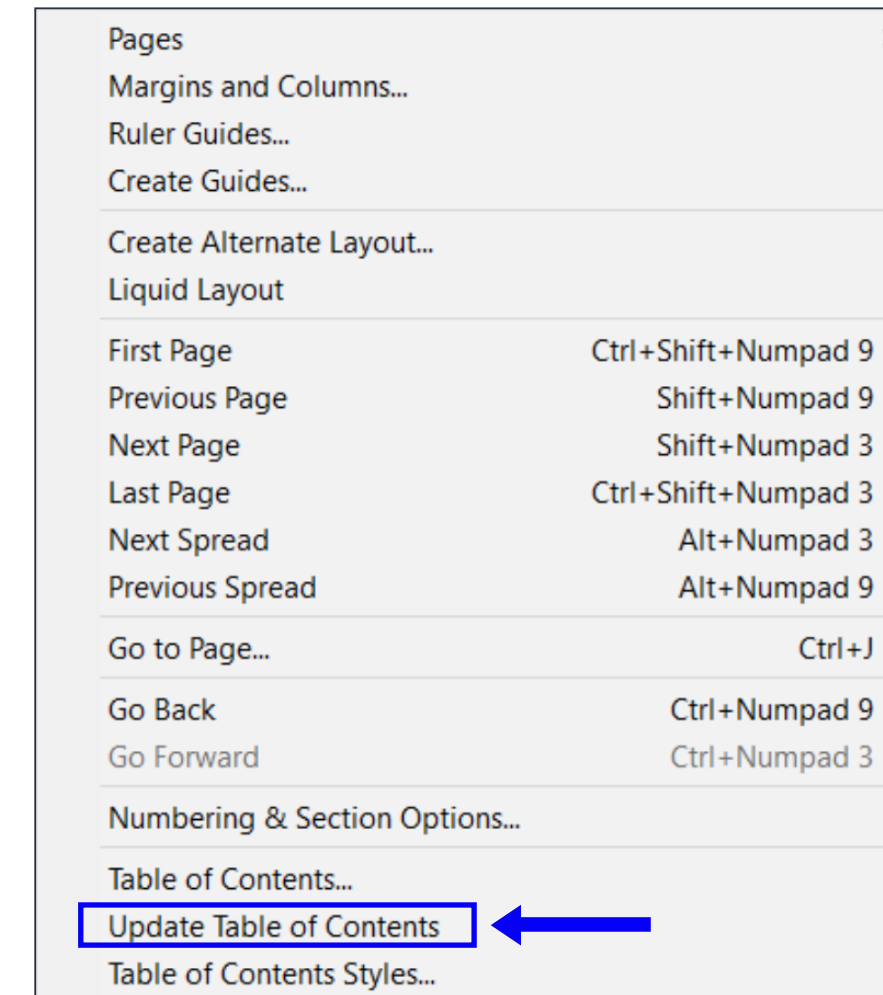
As you add or delete pages/headers/subheaders to your document, you want the Table of Contents to reflect those changes. The process of updating the Table of Contents happens manually, as is depicted in the following scenario where a new subheader is added:



1. Select the text frame containing the Table of Contents.

Contents	
Header #1	
Subheader #1	1
Subheader #2	2
Header #2	
Subheader #1	3
Subheader #2	4
Header #3	
Subheader #1	10
Subheader #2	11
Further Questions	14

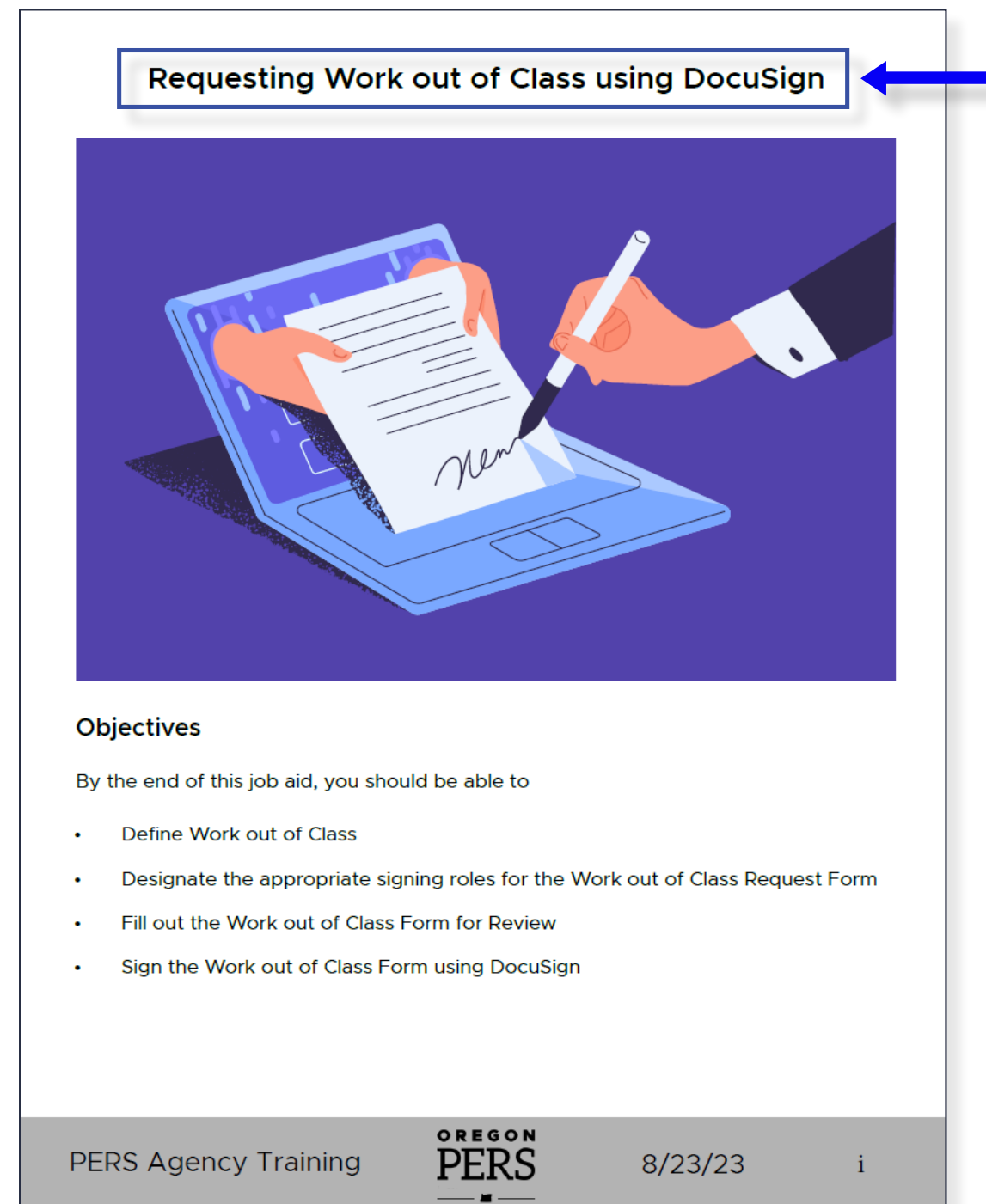
2. Under the “Layout” Menu tab, select “Update Table of Contents”



Contents	
Header #1	
Subheader #1	1
Subheader #2	2
Header #2	
Subheader #1	3
Subheader #2	4
I Just Added This Subheader	5
Header #3	
Subheader #1	10
Subheader #2	11
Further Questions	14

LENGTHY DOCUMENTATION TEMPLATE: COVER PAGE

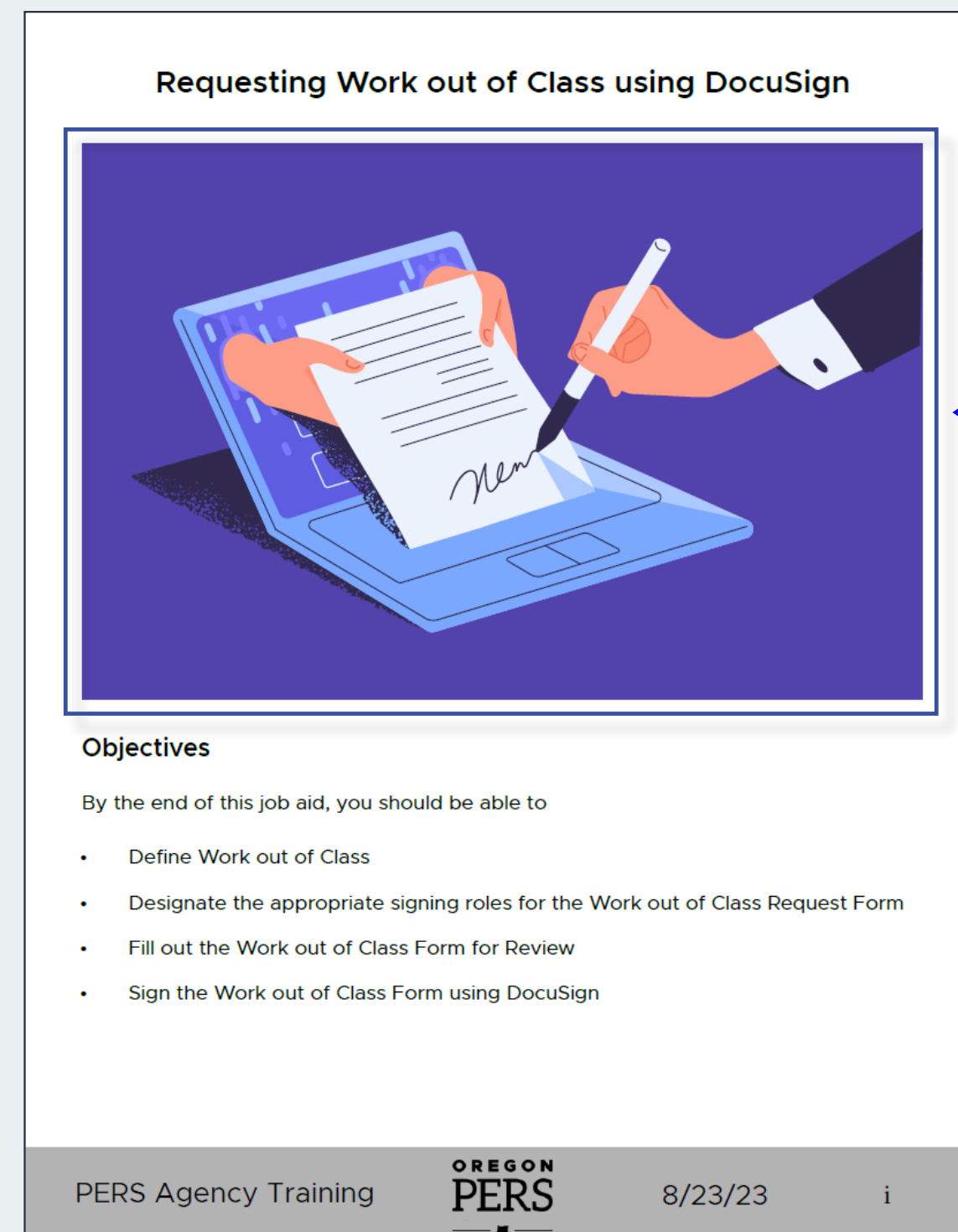
TITLE



Describe the purpose of the documentation in broad strokes by editing the Title placeholder in this template.

The Title on the Cover page should use the Paragraph Style "[TitleonCoverPage](#)".

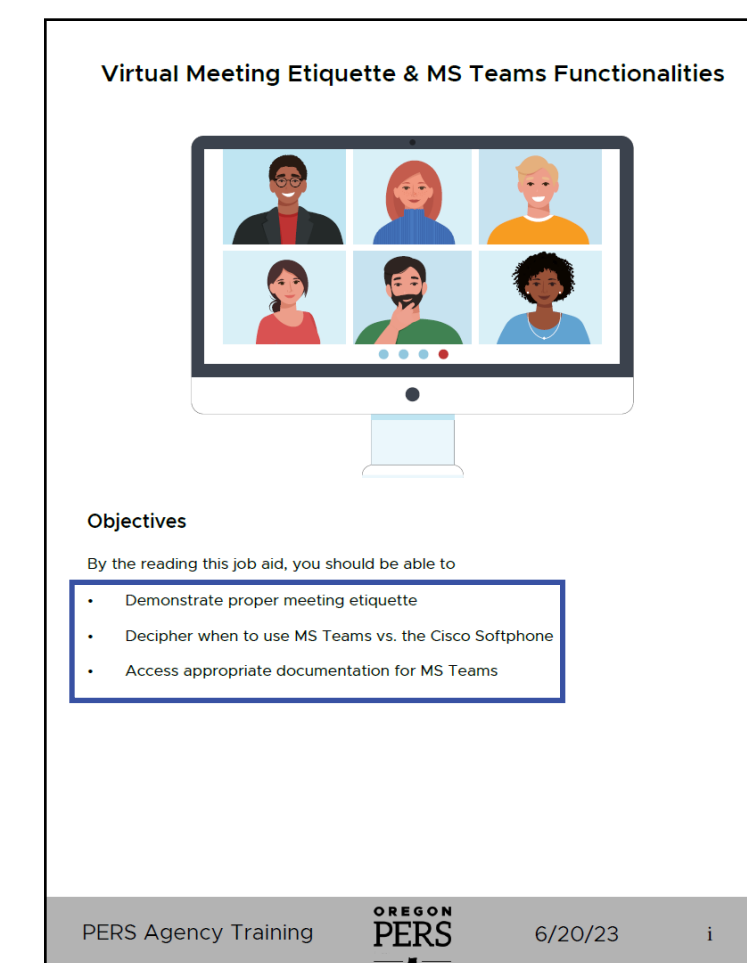
GRAPHIC



Obtain a vector/high-resolution image that is associated with the content of the documentation. You may wish to use Adobe Stock, Creative Commons photos, Vecteezy, flaticon, etc. to source this file.

[Place the sourced vector or image within the rectangle frame](#) of page i.

OBJECTIVES



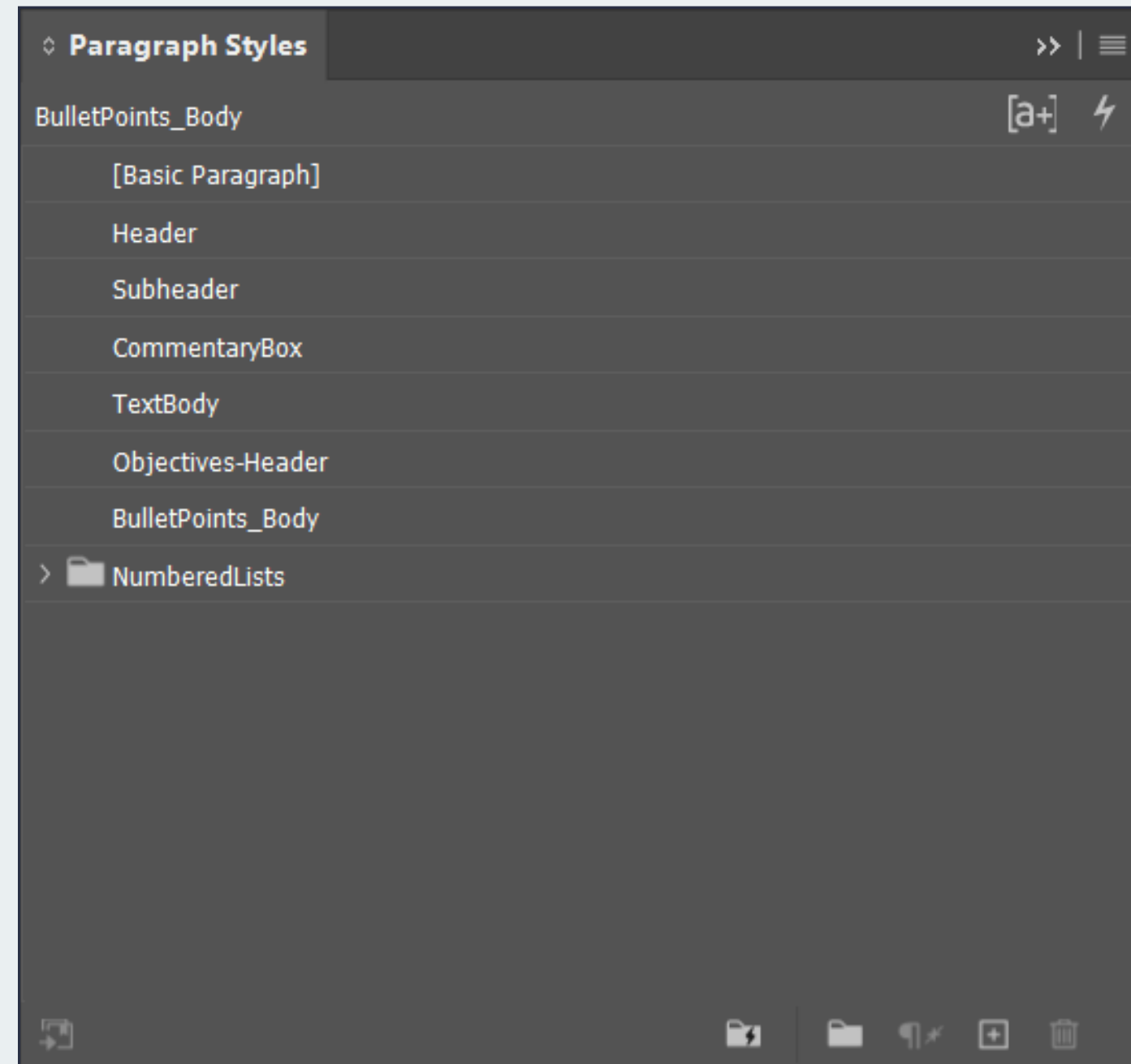
Write out the objectives on the Cover Page of the Template.

Generally, the terms “understand” or “know” should not be used when writing objectives. For more information on writing measurable objectives, check out [this article from the University of Arkansas](#).

The Objectives on the Cover page should use the Paragraph Style "[ObjectivesforCover](#)".

PARAGRAPH STYLES

WHAT IS A PARAGRAPH STYLE?



Paragraph Styles help to maintain consistency throughout the documentation. They allow us to apply specific character and paragraph styles to a text frame with a single click. To learn more about paragraph styles, [check out this article from Adobe](#).


Besides maintaining design consistency, Paragraph Styles are crucial to the functioning of the [Table of Contents](#).

CREATE YOUR OWN


The Paragraph Styles found within each template are not intended to be comprehensive. You are encouraged to create your own as the need arises.

Advantages and Disadvantages of Work out of Class

There are several advantages and disadvantages involved with having an employee Work out of Class:



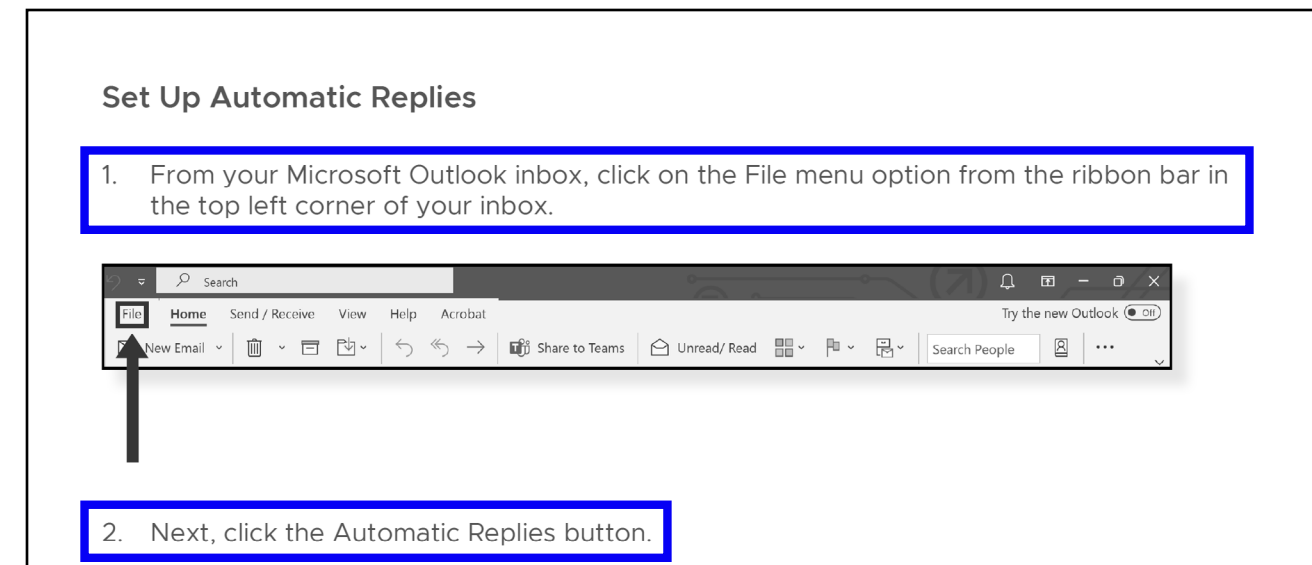
- **Current employees Working out of Class have already been through the agency-wide portion of their onboarding.** This can save PERS significant time and money versus onboarding a new, external employee
- **Working out of Class can be ended at any time and for any reason.** Removing a permanent employee who is not performing to expectations from their incumbent position is generally much more onerous after the end of their trial service period
- **You are giving a developmental opportunity to PERS Staff.** WOC can give a PERS employee a ramp to meet minimum qualifications and continue on their career development



- **Are you robbing Peter to pay Paul?** Working out of Class may only be shuffling vacancies within PERS
- **Working out of Class generally must be renewed at the conclusion of the biennium or the end of the 12 month assignment, whichever is shorter.** Hiring for a permanent position means the budget has been allocated and there is less uncertainty regarding funding/getting required approvals going forward

← This is a paragraph style that was created specifically to fit bullet points in these two narrow columns.

NUMBERED STEPS




There are eight numbered list styles within the documentation template, which allow you to create eight different numbered directions across multiple text frames and pages. These paragraph styles have the following notation: “[NumberedList-X](#)”. Select the paragraph style “NumberedList-1” when you are creating the first level (1, 2, 3, 4) of the **first** numbered list within your InDesign file, and so on.

Numbering directions across pages and/or frames requires the use of defined lists within InDesign. If you need to create more numbered lists or adjust current ones, watch [this video](#).

If you insert a new numbered list item before an existing list item of the same paragraph style on the same page, the automatic numbering likely will not work correctly. For a solution, [read this discussion](#).

OPTIONS

Source a Profile Photo

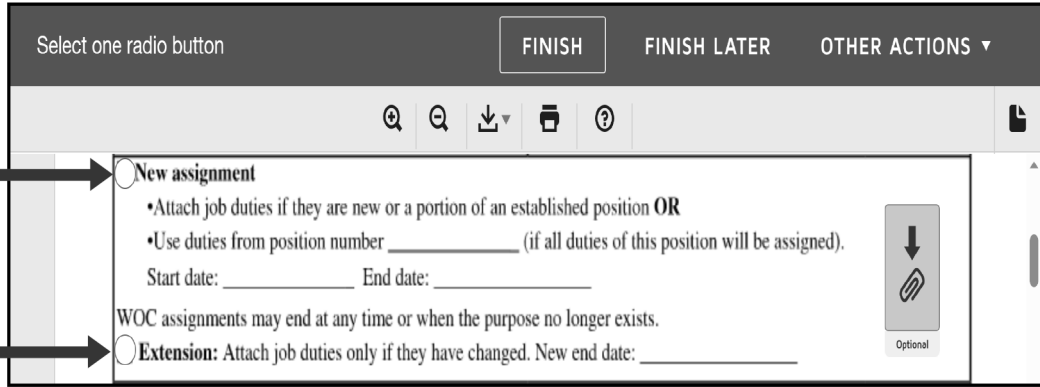
1. Source an appropriate Workday Profile Photo
 - A. Have the PERS Production Team take a professional photo of you. Send an email to pers.production@pers.oregon.gov and request a time for them to take a photo of you.
 - B. Locate a head shot photo which portrays you professionally. A Workday profile photo has the following requirements:
 - Your Photo should be an individual head shot (shoulders and above) and be an appropriate professional image. See samples [here](#).
 - The photo should be clear, of good quality, and a view that is close enough for you to be easily identified
 - You should be dressed in appropriate business formal or business casual attire
 - Examples of photos that do not meet guidelines include: caricatures; group photos, vacation photos; sports/hobby photos, photos of pets, etc.

Sometimes there may be multiple ways of completing a step. In these instances, first describe what needs to be accomplished in the first level. Then, use the paragraph style “[NumberedList-X-SecondLevel](#)” to mark each option for completing the step in the first level.

Please note that all objects [should be aligned to the step with which they correspond](#). For instance, the image above is aligned to step A, not to step 1.

OPTIONS WITHIN OPTIONS

10. Select whether the WOC position will be a new assignment or an extension of an existing assignment. Depending on your selection, you may have additional options.



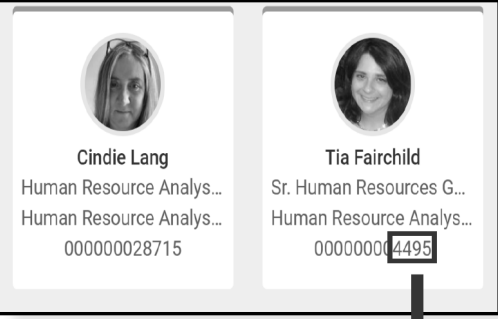
Option A → **New assignment**
• Attach job duties if they are new or a portion of an established position **OR**
• Use duties from position number _____ (if all duties of this position will be assigned).
Start date: _____ End date: _____
WOC assignments may end at any time or when the purpose no longer exists.

Option B → **Extension: Attach job duties only if they have changed. New end date: _____**

A. If you select that the WOC position will be a **New assignment**, select the intended start and end dates for the employee you are planning to have Work out of Class using the calendar dialog boxes. You can request to have Work out of Class extended later if needed.

i. If there is a match between the position description of a position the employee will be working out of class in enter that position number here (available via Workday's Org Chart feature- as shown in [Step 4](#)).

An example of when you would use this option is if Cindie Lang, Human Resources Analyst 2, will be working out of class as a Human Resources Analyst 3 for three months to fill in for Tia Fairchild 's absence while Tia is out on Leave.



ii. Sometimes Working out of Class will involve new responsibilities for which there is no one currently within the agency with a matching position description (e.g. the WOC is not to fill in for someone else while they are temporarily on leave). If this is the case, attach the position description, which contains the job duties, here. All position descriptions in the agency can be found within the Position Description Folder in K Drive: k:\Human Resources\POSITION DESCRIPTION\PD_Updates\Position by Division

In some very rare instances, there will be options within options for a particular step-as depicted in the WOC DocuSign Job Aid (above). In these instances, use the paragraph style “[NumberedList-X-ThirdLevel](#)” to mark the third level.

PARAGRAPH STYLES

DIRECTIONS (NON-SEQUENTIAL)

Email Etiquette & Tips

Tip #1 - Don't respond to an email when emotional. Cooler heads should prevail. Take a little time to compose yourself first before typing and sending your response.

Tip #2 - Proofread your emails. An occasional spelling or grammar mistake can happen, but if your emails are always littered with them it's a problem. It can make you look unprofessional and like you don't care about your job.

Tip #3 - Keep emails concise. Keep business emails brief while conveying critical information. According to research, the magic number is 50 to 200 words.

Tip #4 - Respond to emails promptly. In a perfect world, we'd respond to emails immediately. But busy schedules and cluttered inboxes means this isn't always possible. Try to follow the 12-24 hour rule for responding to emails.

Tip #5 - Use "Reply all" correctly. Only ever use "Reply all" if you feel your response is important and everyone should know, e.g., you've fixed an important issue the email raised. If you're thanking a specific person, you're better off just replying to them.

Sometimes there is not a linear set of steps, but a general set of principles to be applied by the learner. In this case, one option is to use the paragraph style "[TextBody](#)" from the Paragraph Styles panel.

BULLET POINTS

- Bullet 1
- Bullet 2
- Bullet 3

In order to use bullet points within the body of the InDesign document:

1. Select the text box with which you intend to set the paragraph style
2. Select "[BulletPoints_Body](#)" from the Paragraph Styles Panel

This paragraph style is not intended for the objectives found on the cover page, "Long-i" or the objectives found on the Header Section of page "Short-1".

COMMENTARY BOXES

Greg Bellenger (he/him)
Human Resource Analyst
Oregon Public Employees Retirement System
503-603-7690



CONFIDENTIALITY NOTE: All information in this email, including attachments, is approved solely for delivery to and authorized use by intended recipients. Use, dissemination, distribution, or reproduction of this message and/or any of its attachments by unintended recipients is not authorized and may be unlawful. If you are not an intended recipient of this message or an authorized assistant to an intended recipient, please notify the sender by replying to this message and then delete it from your system.

S13

Explanation: Greg chose Security Level 3 in his email signature because a good deal of the information he will be emailing is of a restricted security level. One example of Security Level 3 is discussing disciplinary action of an employee with a manager. Another is emailing an employee to discuss the use of FMLA or OFLA for taking time off to treat a recently diagnosed medical condition.

Commentary Boxes add additional context or an explanation to a direction. In order to use a commentary box, copy and paste the example commentary box from the template.

If you would like to view the settings through which the commentary box was constructed, skip to [its section in the Appendix](#).

Did you know? You can create a case two separate ways: 
A. Using keywords in the Global Search Bar
B. Via the [Help App](#) in Workday 

The Box should only extend the width of the text; unlike in the above example.

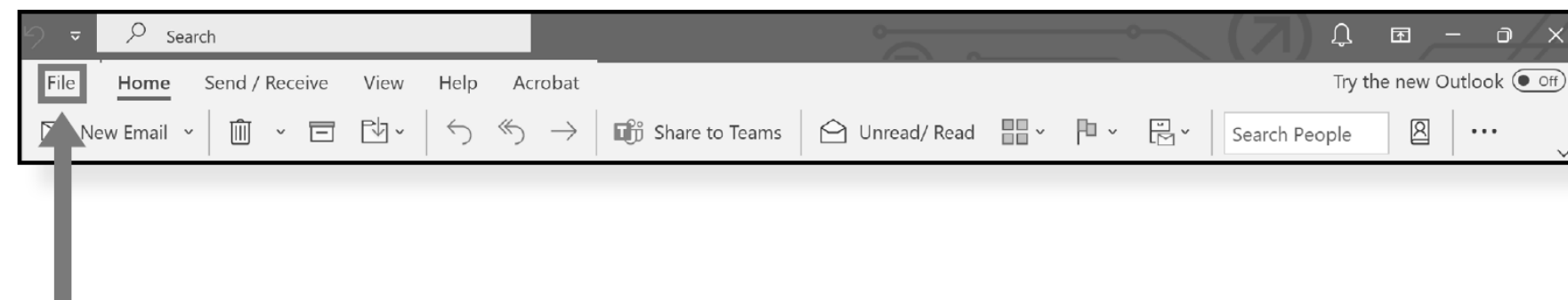
HEADERS

Outlook Email

Create Email Signatures

Before creating an email signature check with your manager to see if there are any requirements that need to be included with your email signature.

1. From your Microsoft Outlook inbox, click on the File menu option from the ribbon bar in the top left corner of your inbox.



Headers can be used to improve the navigation and skimmability of documentation.

Headers are not required for short documentation, as there is no Table of Contents. To understand the relationship between the “Header” paragraph style and the Table of Contents, [go here](#). In some scenarios, adding headers does not improve navigation. An example is the [Manager 1:1 Job Aid](#): adding header(s) to this three page document doesn’t add any more useful information than the Title already provides.

In order to create your subheader, type in text into a new text box and then select “[Header](#)” from the Paragraph Styles Panel with the text box selected.

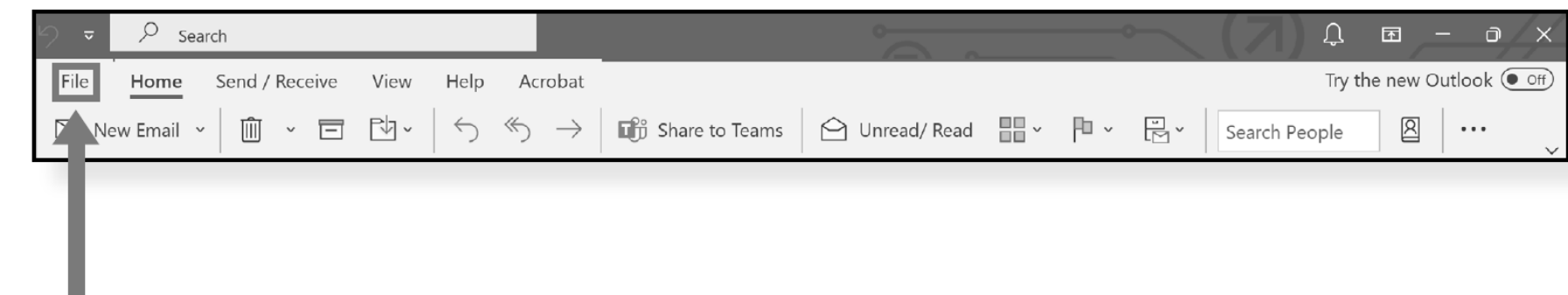
SUBHEADERS

Outlook Email

Create Email Signatures

Before creating an email signature check with your manager to see if there are any requirements that need to be included with your email signature.

1. From your Microsoft Outlook inbox, click on the File menu option from the ribbon bar in the top left corner of your inbox.



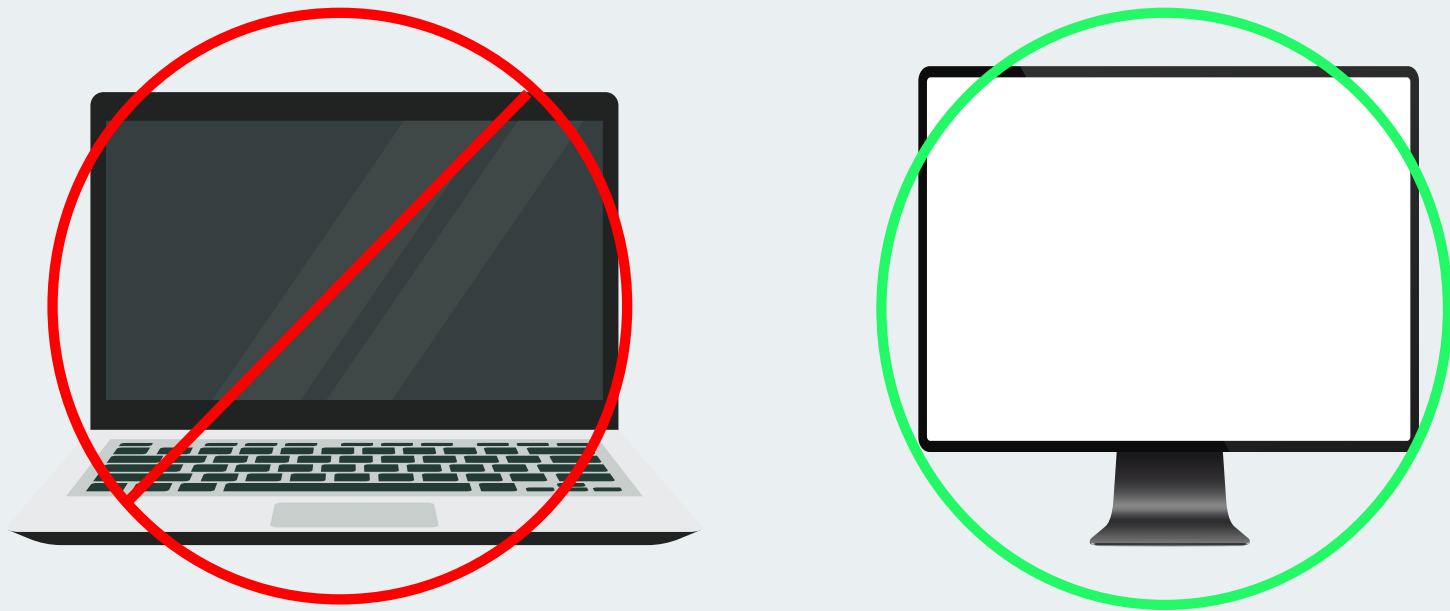
Subheaders should be used for separating out subsections of a job aid, such as “Create Email Signatures” within the Outlook Job Aid.

In order to create your subheader, type in text into a new text box and then select “[Subheader](#)” from the Paragraph Styles Panel with the text box selected.

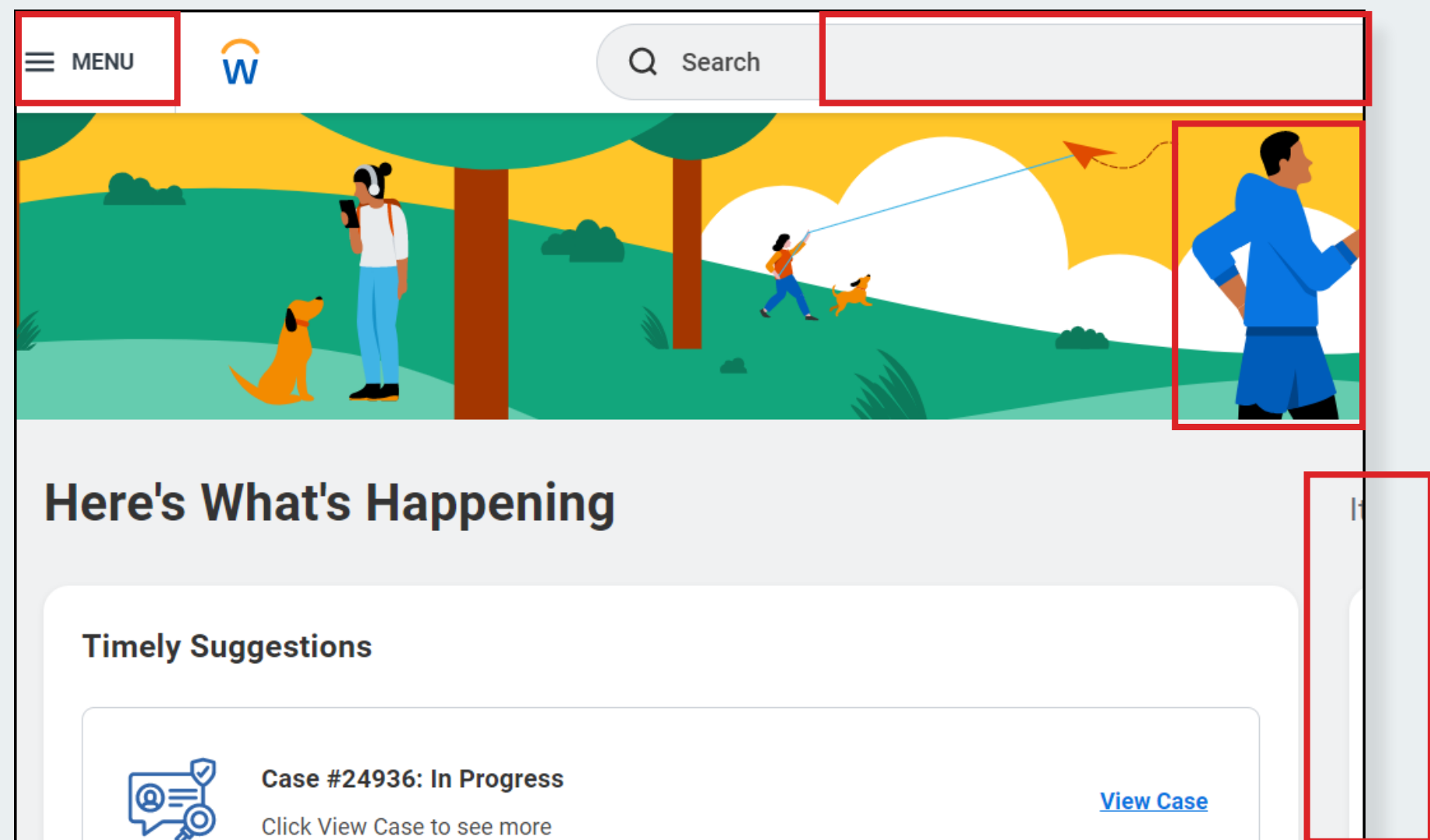
SCREENSHOTS

SCREENSHOTS

CAPTURING SCREENSHOT

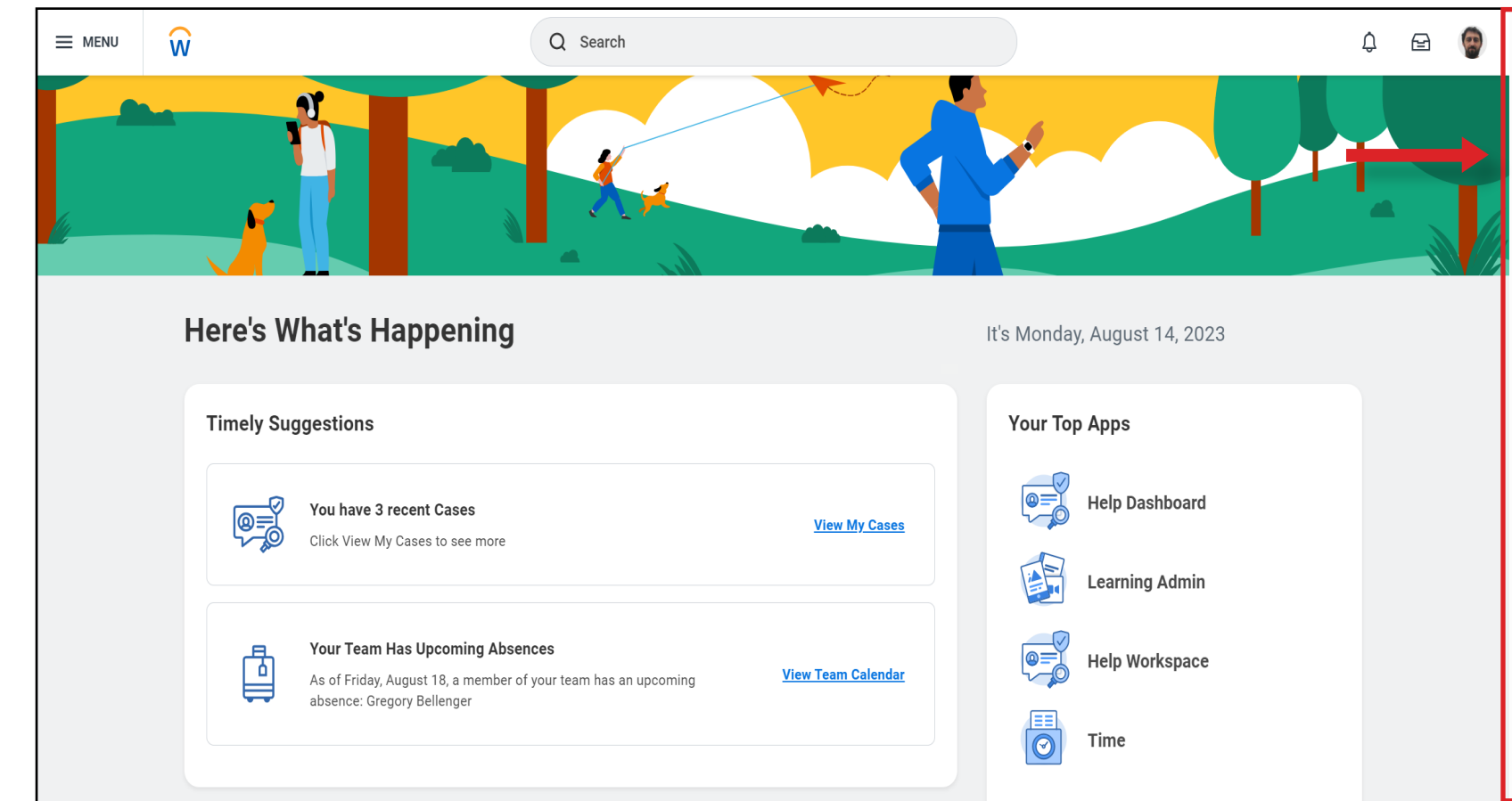


Capture a screenshot using your largest monitor for the best resolution.

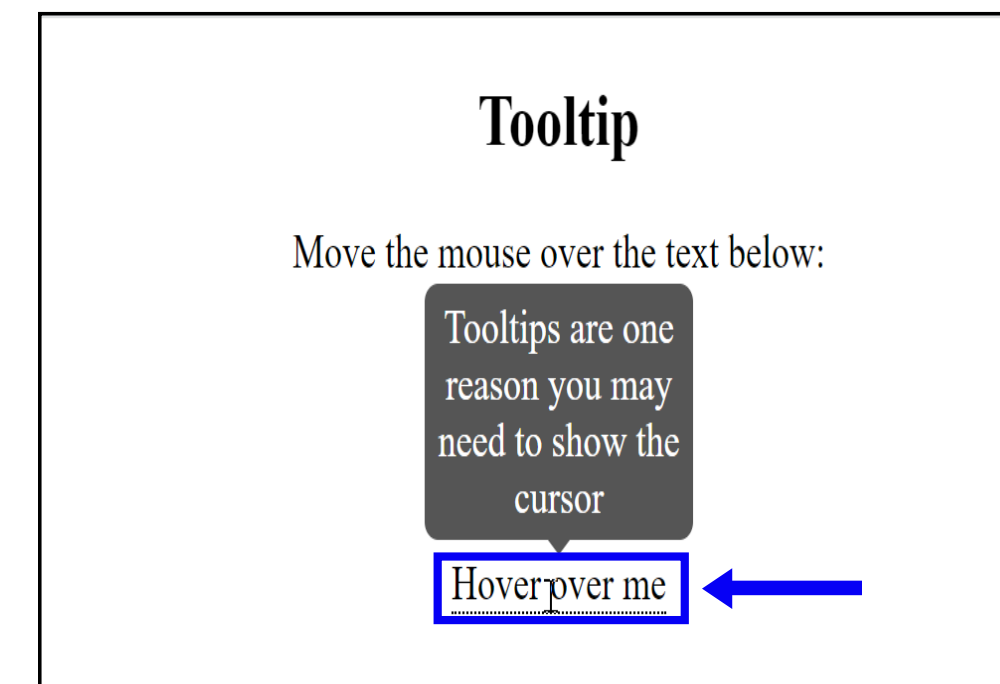


Don't cut off any words, shapes, people, assets, etc. while capturing your screenshot.

SCREENSHOT SPECIFICATIONS

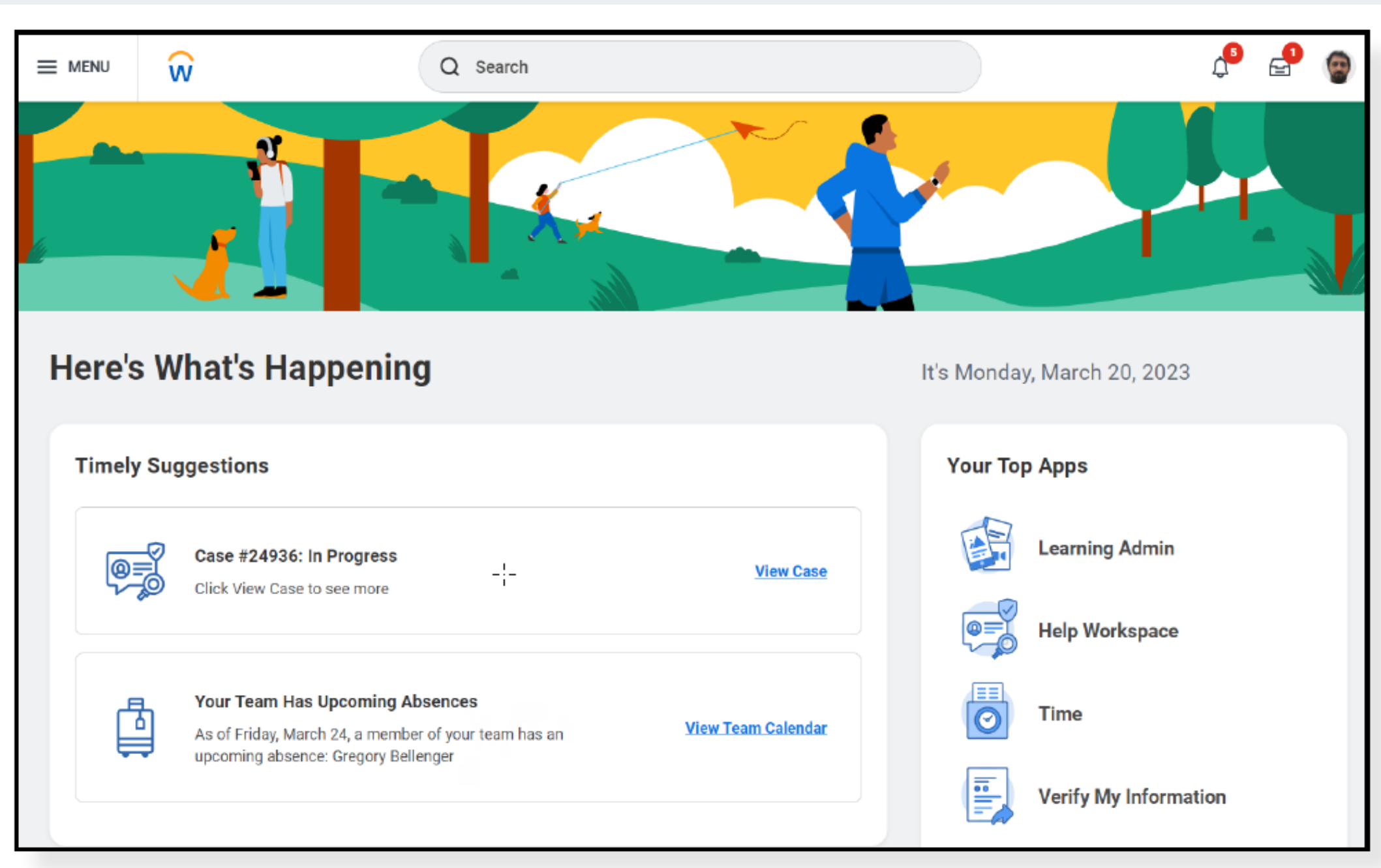


Generally, exclude the scroll bar on a browser window. In cases where directions involve scrolling on a longer page, include it.



Generally, exclude the cursor when taking a screenshot. Only include the cursor when it's necessary in order to demonstrate a certain procedure-such as the above screenshot where how to display a tooltip is being demonstrated.

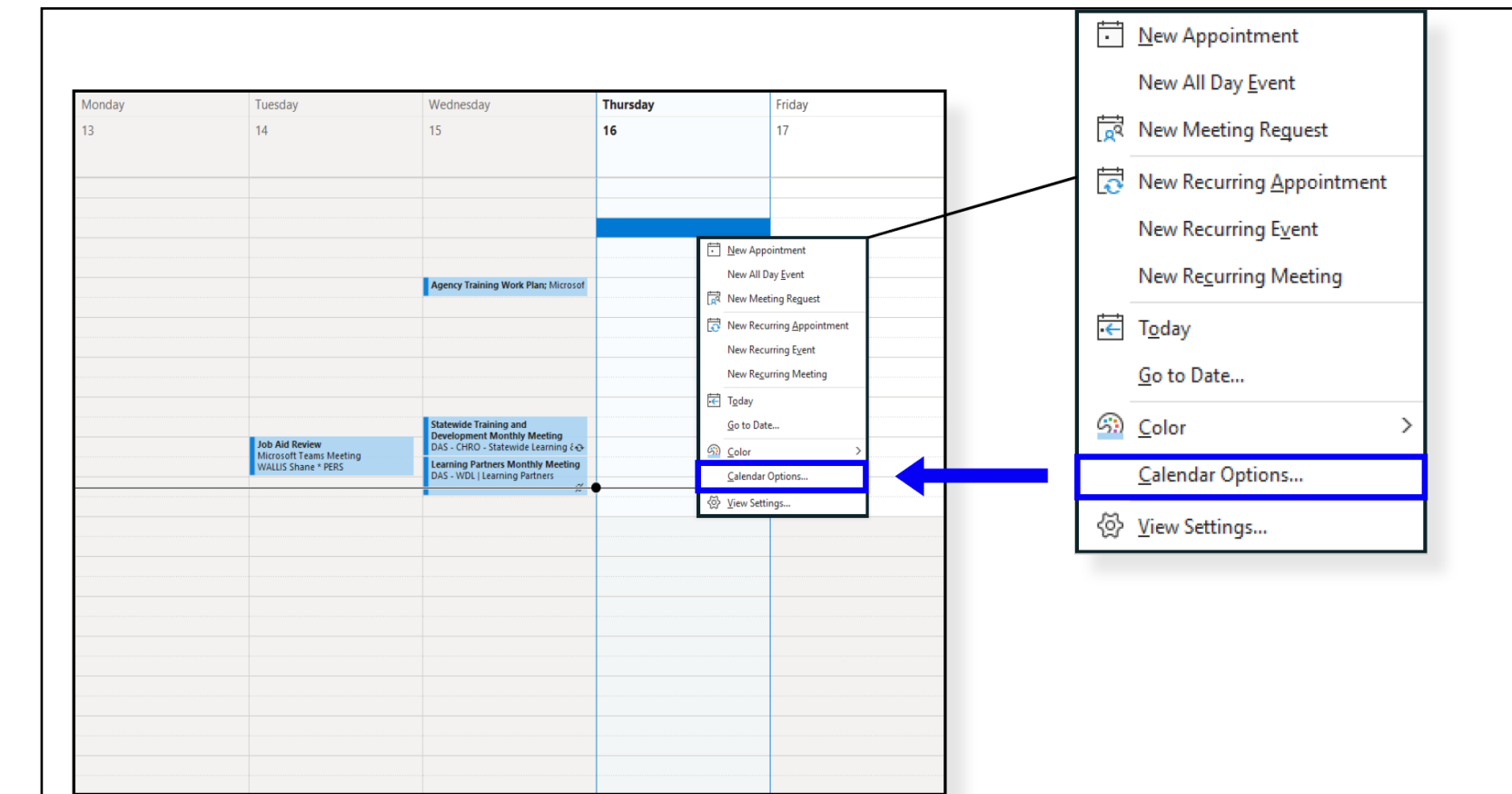
SCREENSHOT STYLING



Add the following styling options in InDesign to the rectangle frame which contains your screenshot:

- Stroke: 1 pt, [Black](#)
- Drop Shadow Effect with 10% Opacity

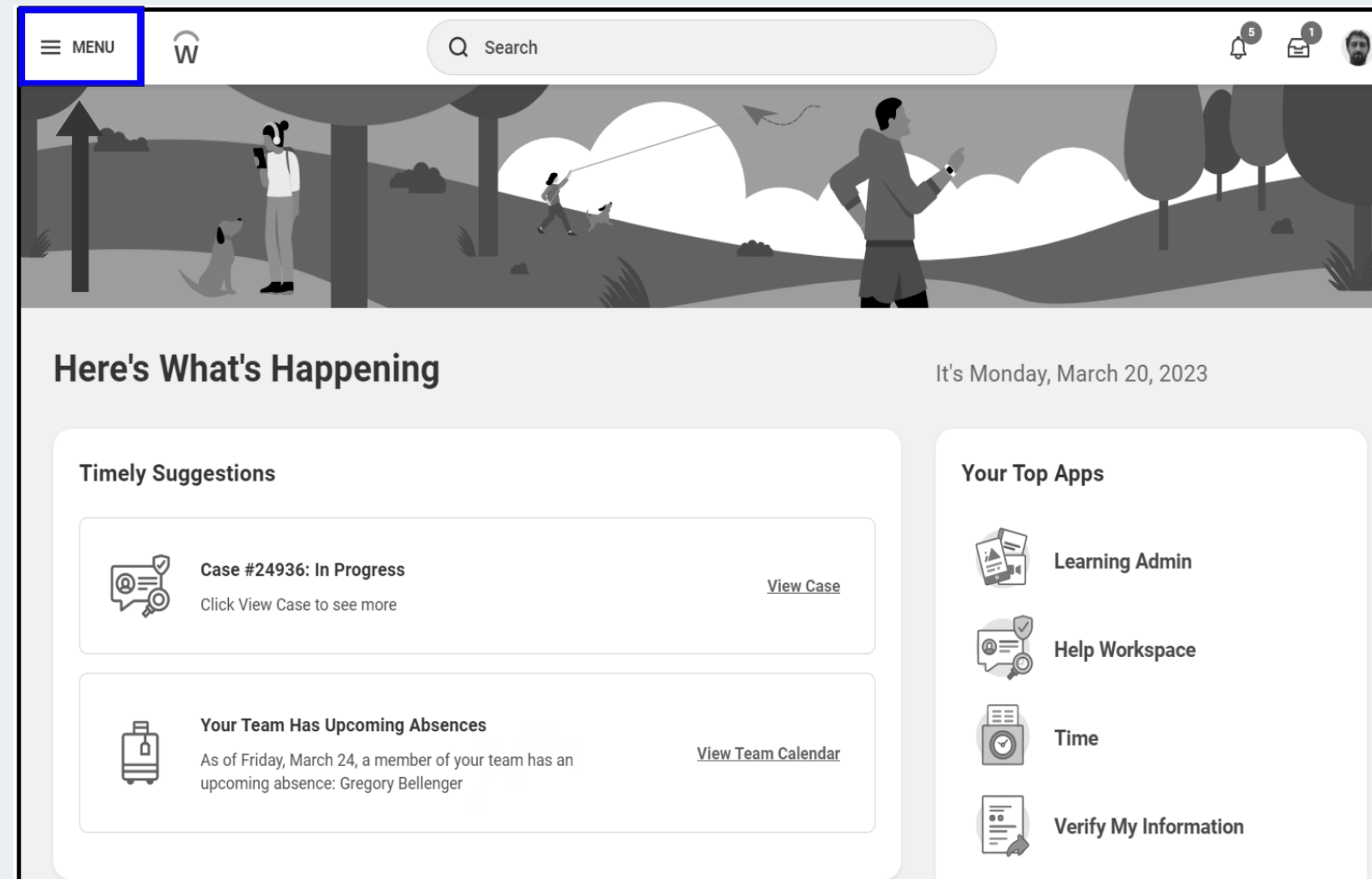
ZOOMED IN OVERLAY



Sometimes it will be difficult to adequately zoom in on a key feature of a screenshot without cutting off words, shapes, etc. In this case, use a zoomed in overlay- as shown above.

1. Take a second screenshot which is more zoomed in on the key feature. You may [need to adjust your monitor's scaling settings](#)
2. Position the zoomed in screenshot by the original screenshot
3. Add 10% drop shadow and an outline of 1.5pt, #000000 to the zoomed in screenshot
4. Place a rectangle with an outline of 1.5pt, #000000 around the part of the original screenshot you are magnifying
5. Create a line, with a stroke of 1.5pt, #000000 which connects the two screenshots

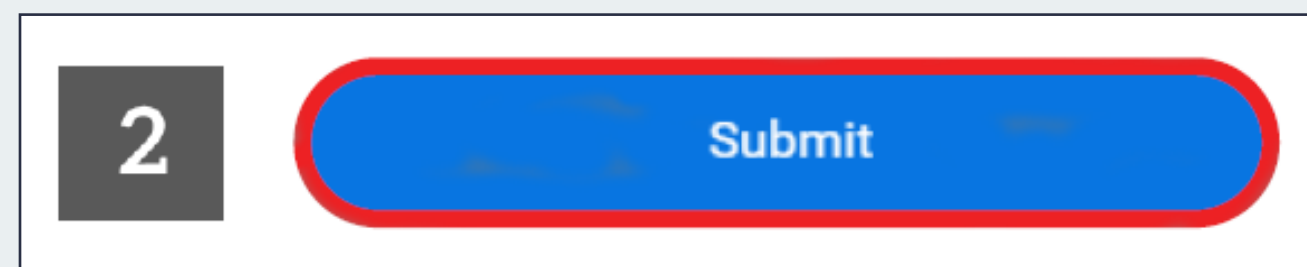
RECTANGLES



We can focus user attention on a particular part of the user interface by using a blue rectangle shape.

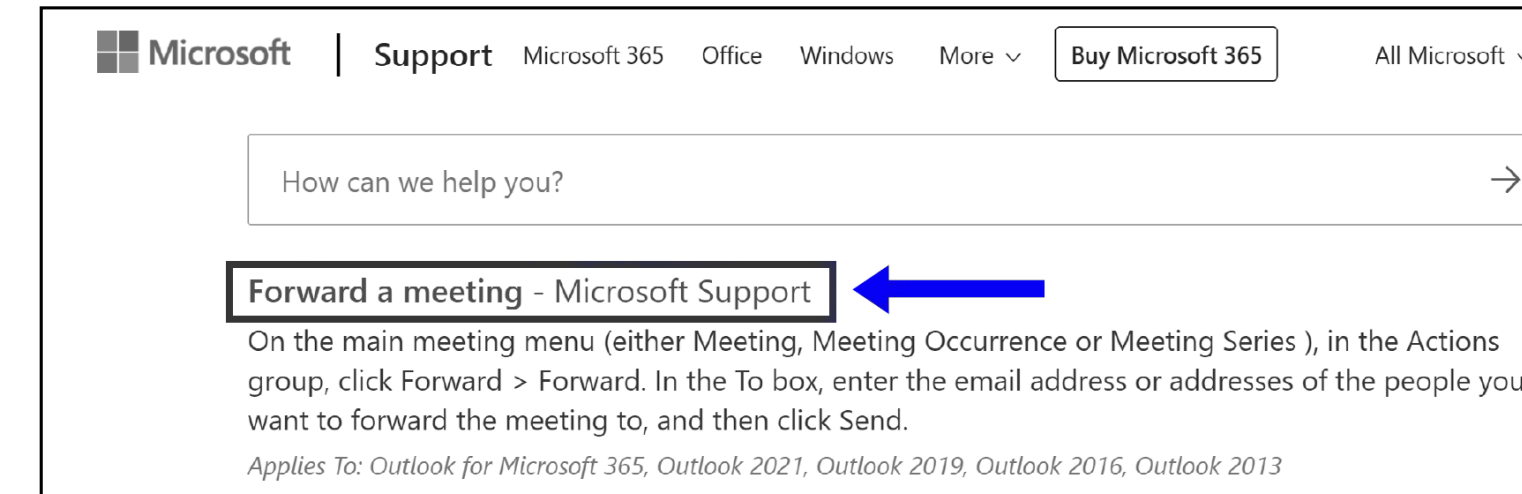
The Blue Rectangle should have the following settings:

- Stroke: 2 Pt, Solid, #0600F5 (“TheJobAidBlue”)



- 90 degree corners; **do not** use rounded rectangles as shown above

ARROWS



If you would like to draw additional attention to a particular part of a screenshot beyond the blue rectangle, use a blue arrow.

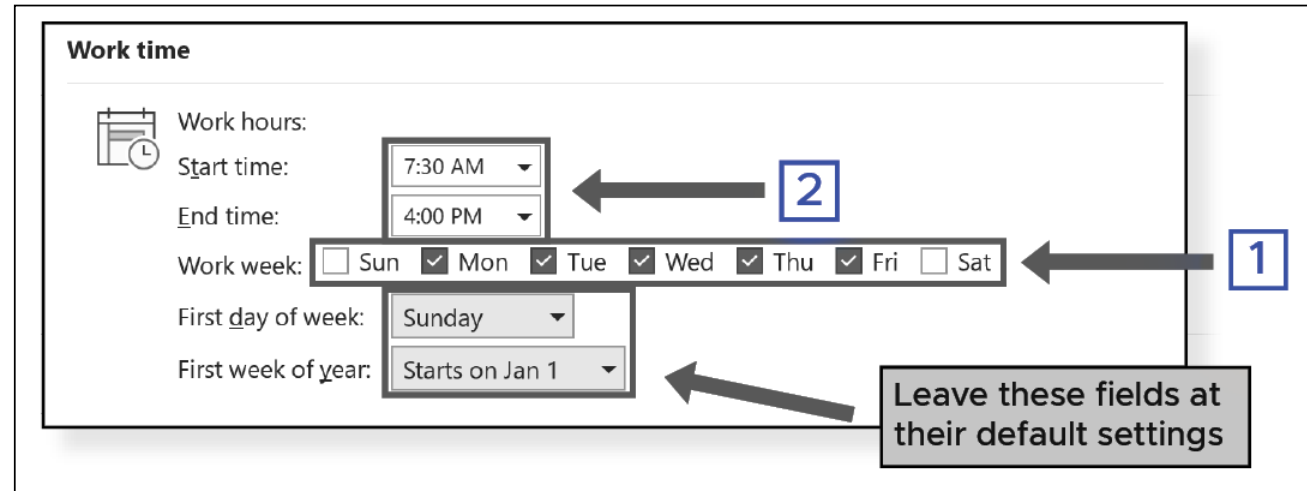
When using an arrow to draw additional attention to a screenshot, position it 5 pixels (5 arrow > keystrokes) from the stroke of the rectangle.



Arrows can also connect steps in a discrete process, as shown above.

If you would like to view the settings through which the arrow was constructed, skip to [its section in the Appendix](#).

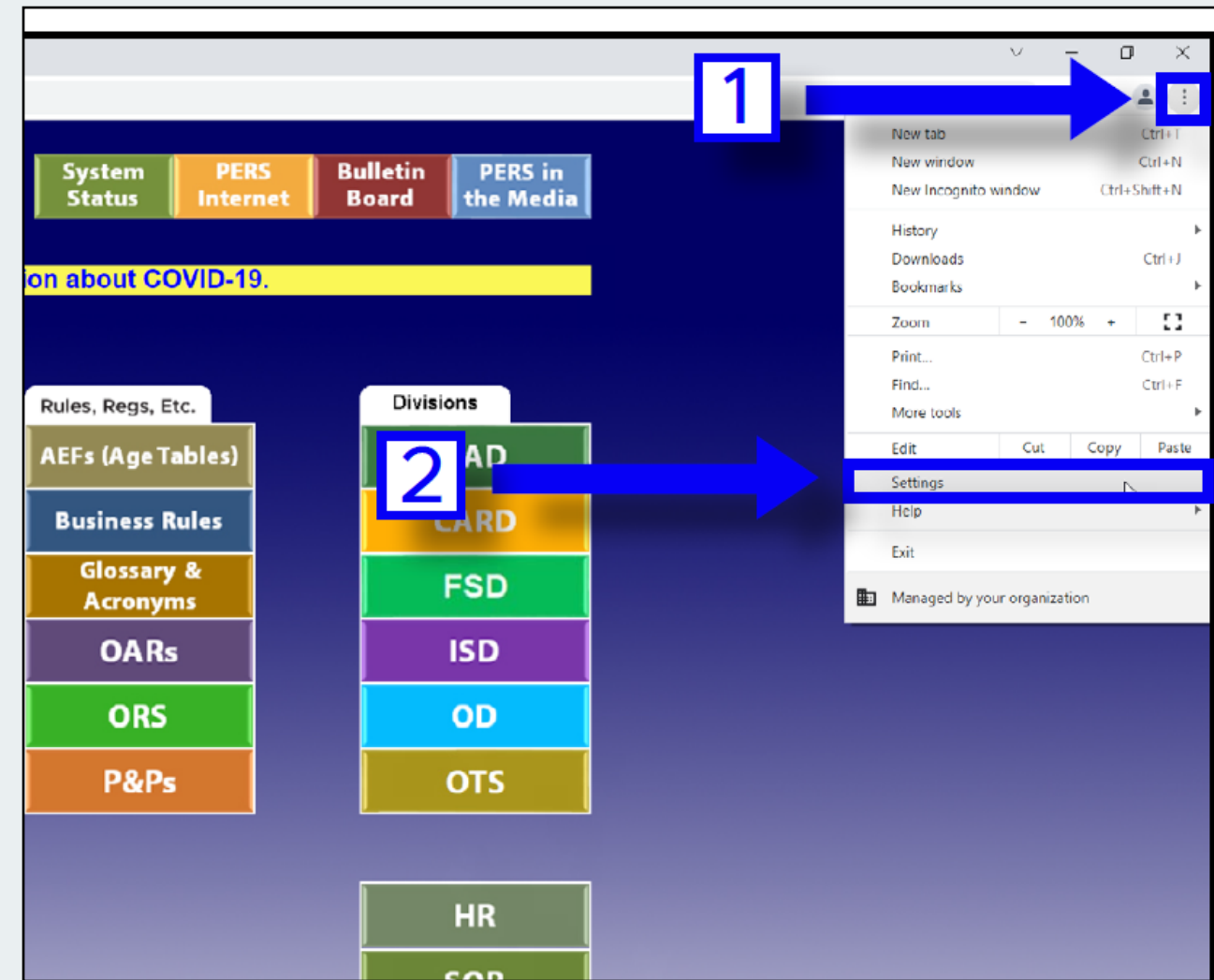
NUMBERED BOXES



Sometimes, a screenshot will need to depict multiple steps. In this case, use the numbered boxes available within either of the two templates.

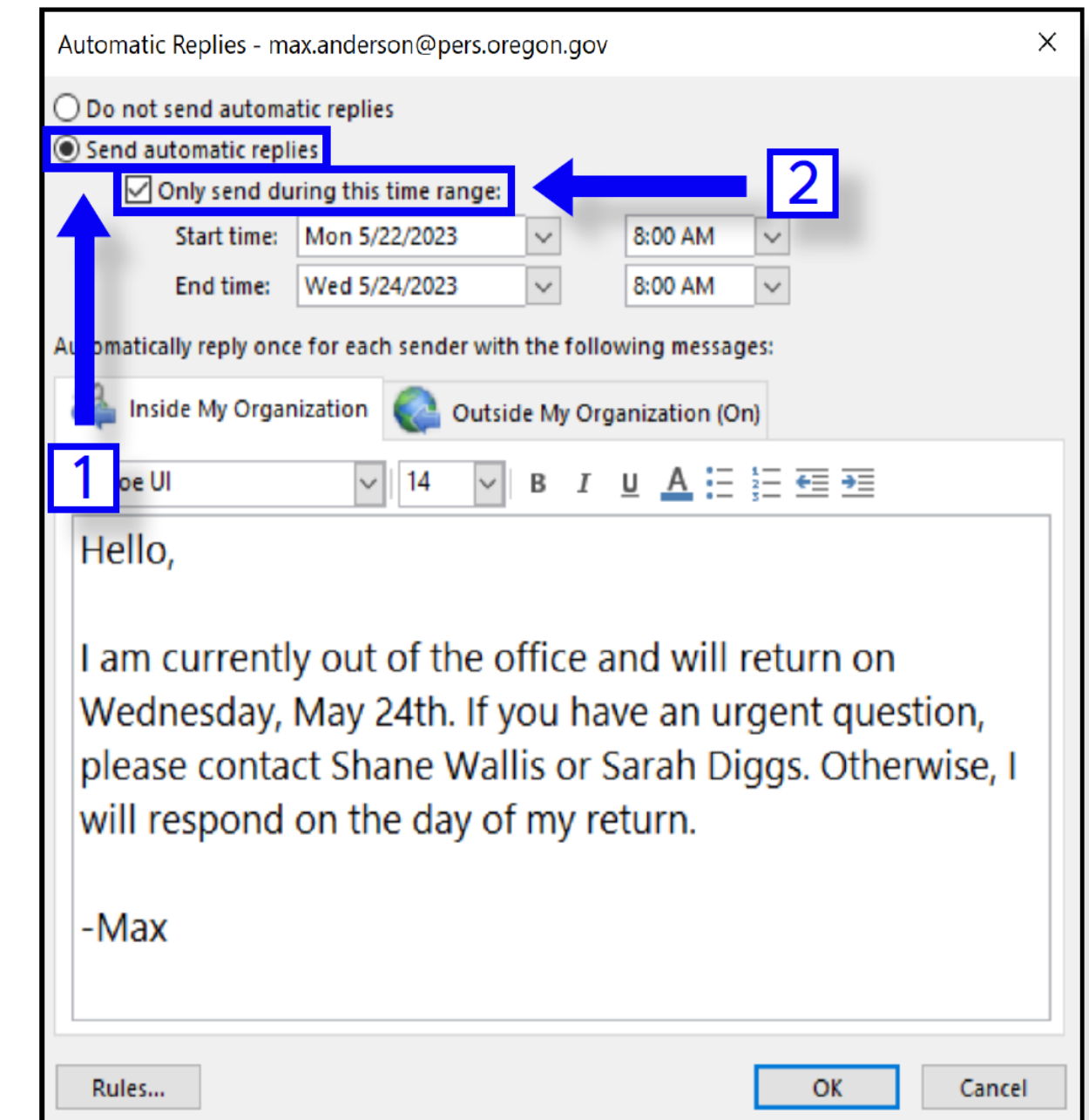
The Numbered Boxes are made using the paragraph style “[Blue Numbered Box](#)”.

LACK OF CONTRAST



The Dark Blue, #0600F5, that is used for arrows, rectangles, and numbered boxes can in some occasions not provide enough contrast with the image below it. In these instances, apply a 20% drop shadow to the aforementioned objects to start off. If you feel there is still not enough separation, you may increase the percentage opacity up to 40%.

A lack of color contrast between a blue region of a screenshot and one of the blue objects above it is one reason you would need to add a drop shadow effect.

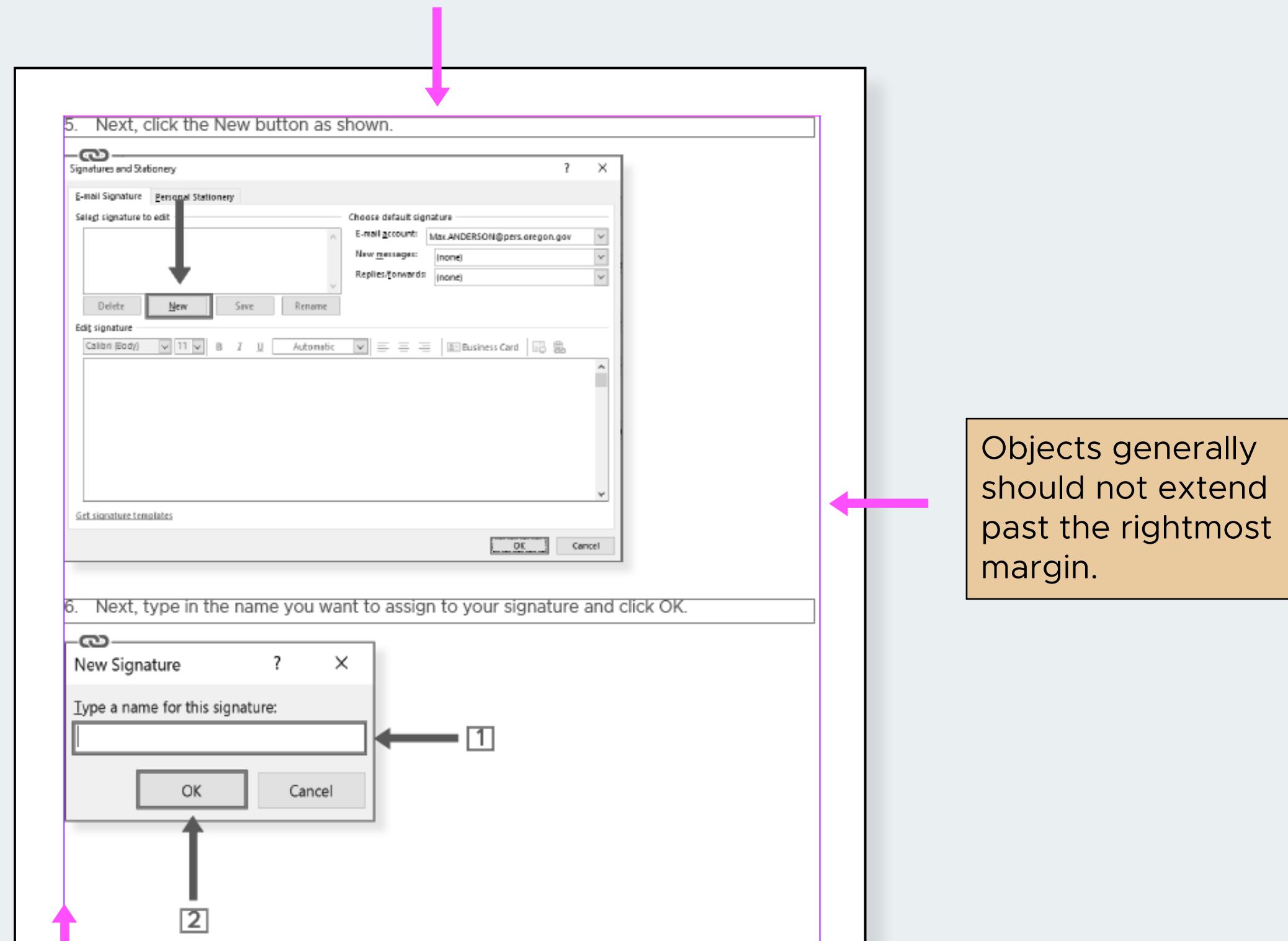


The text below an object may create a lack of separation between an object and the screenshot below it. The drop shadow effect can also be used to mitigate these circumstances.

ALIGNMENT

ALIGNMENT

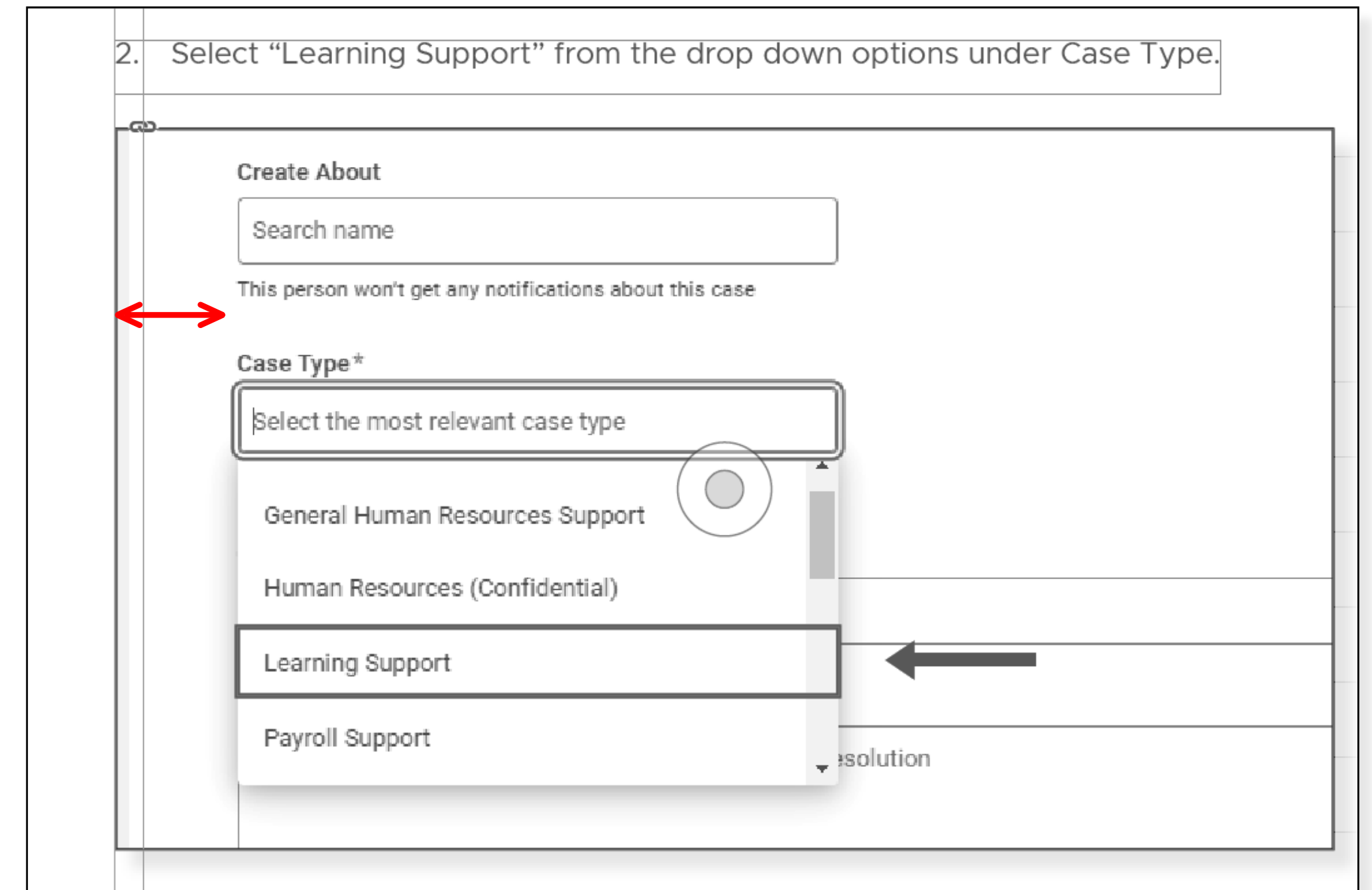
USING MARGINS



Align all objects to the pink 0.5 inch margins- as shown above.

In order to [toggle between viewing the margins, guides and frame edges \(in normal mode\)](#), and [seeing how the document will look when exported \(in preview mode\)](#) hit the “W” key.

PITFALL: OVERSIZED FRAMES

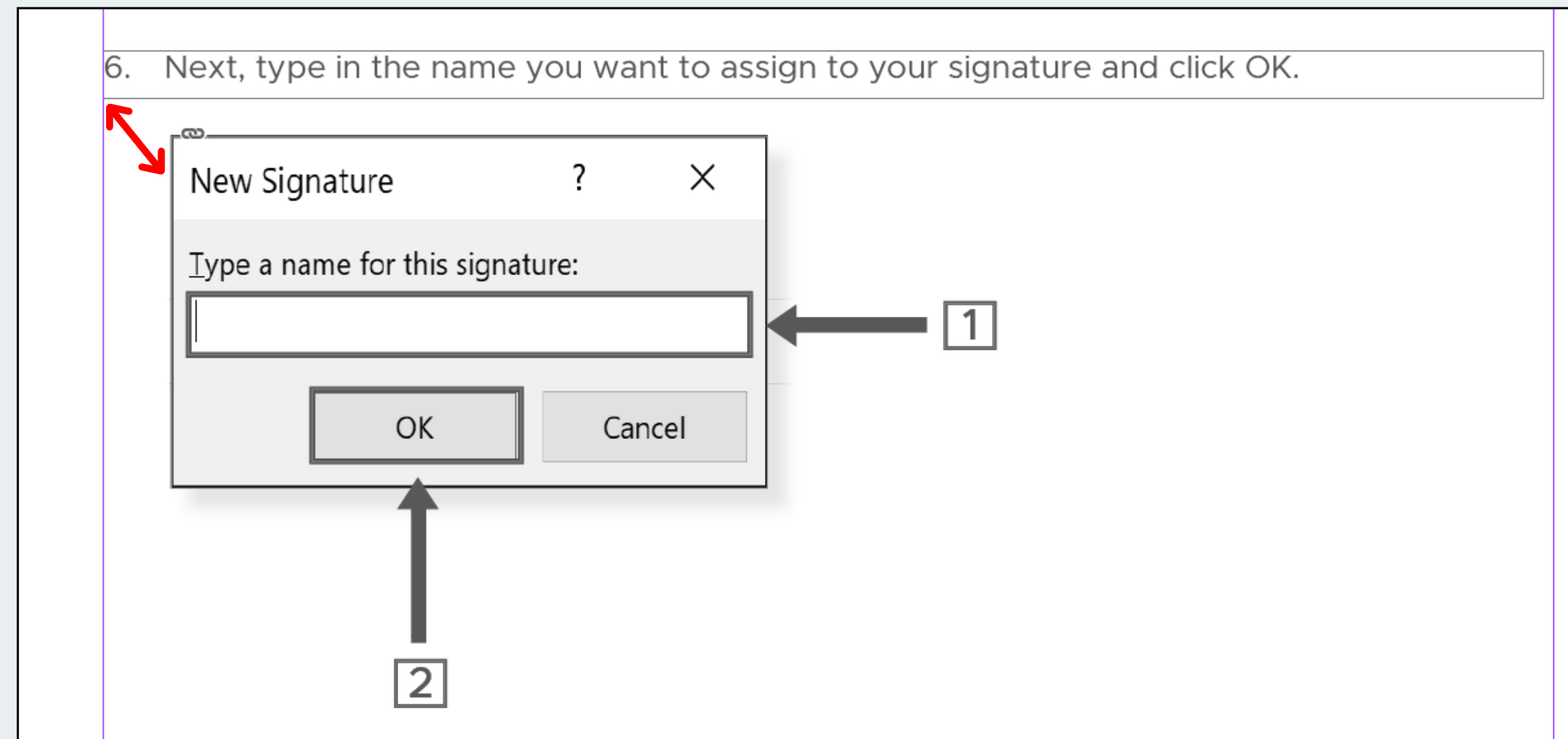


The actual images, not just the frames containing the image, should be aligned with the margins to the greatest extent possible. Pay attention to this particularly when there is lots of whitespace within the screenshot; see above where the image frame is aligned with the margin but the screenshot is not.

The [commands under Object > Fitting](#) may help to keep the size of the frame and its corresponding contents in sync. In particular, the command “Fit frame to Content” may be helpful.

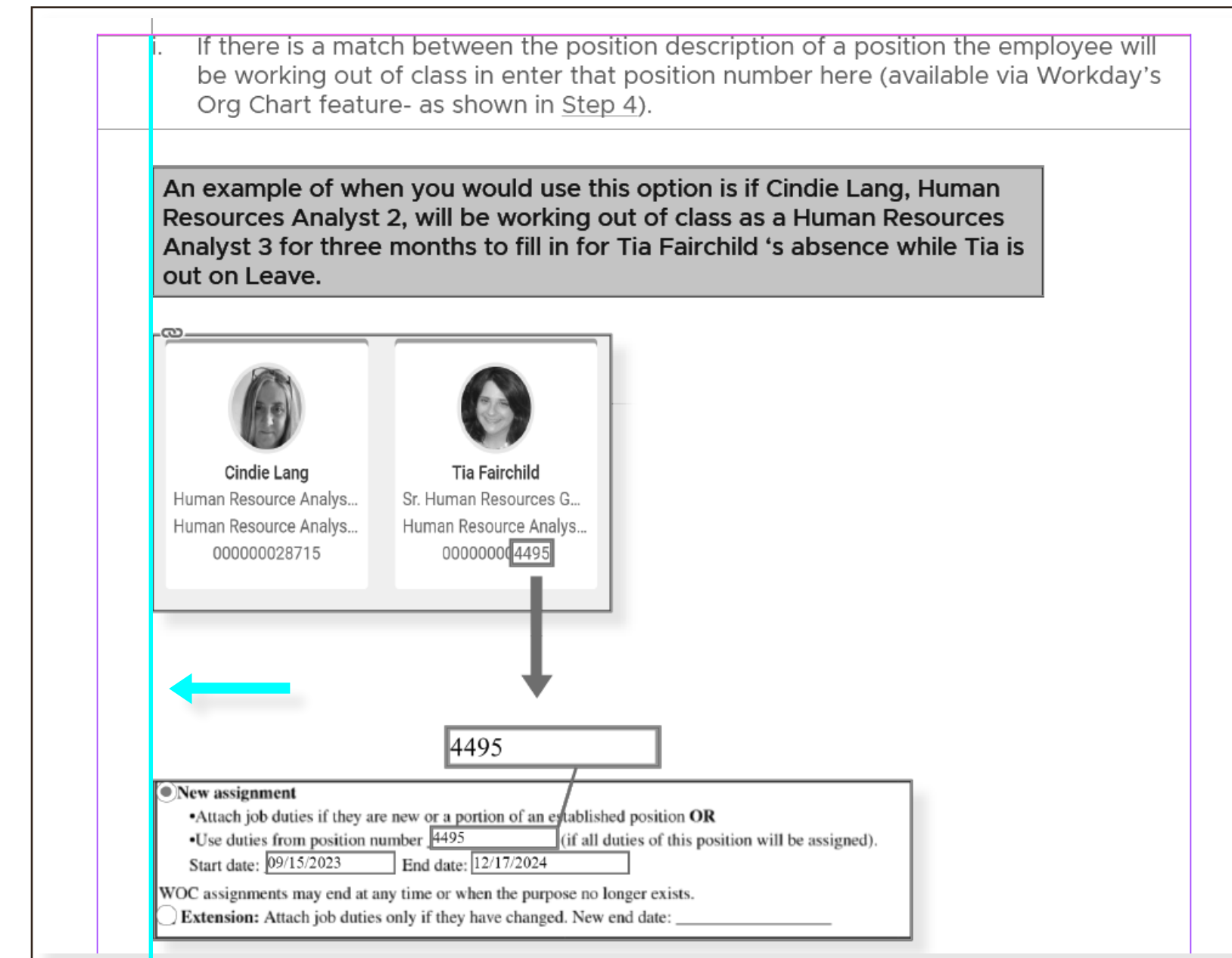
ALIGNMENT

PITFALL: NUMBERED LISTS



Numbers in numbered lists, not the indented textual directions, should be aligned to the margin. The above screenshot is a bad example of this.

EXCEPTION: OPTIONS




There is one **exception** to the rule of aligning all objects to the pink 0.5 inch margins: [options and options within options](#) when creating sequential directions:

Align objects with their corresponding sequential direction-like how the commentary box and screenshots are aligned with i. in the screenshot above.

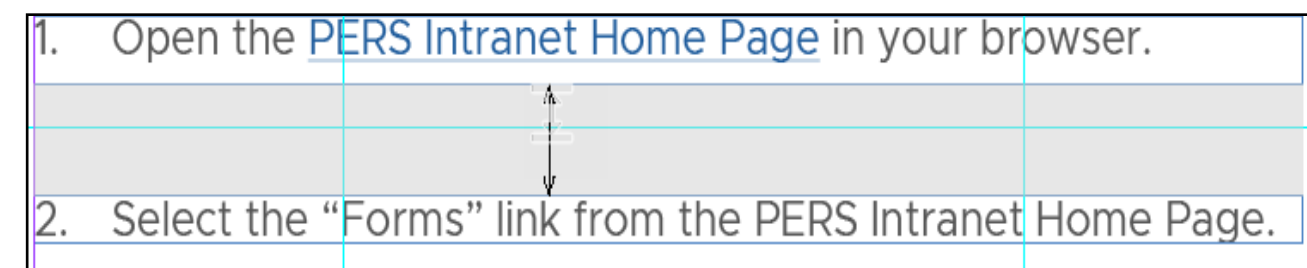
Setting [Ruler guides](#) of 0.6875 and 0.875 inches may help in aligning with options (e.g. A) and options within options (e.g. i), respectively.

SPACING

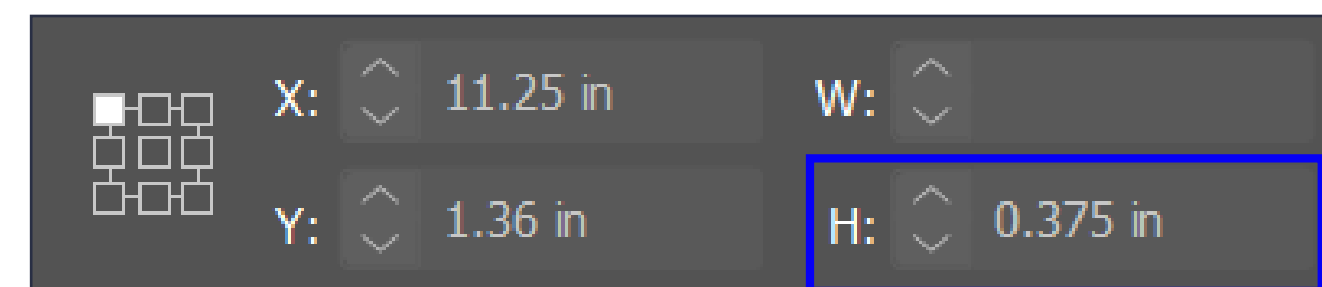
MEASURE SPACING

 You can check the spacing between two objects on an artboard using the [Gap tool](#):

1. Select the Gap Tool
2. Hover over the gap you want to measure

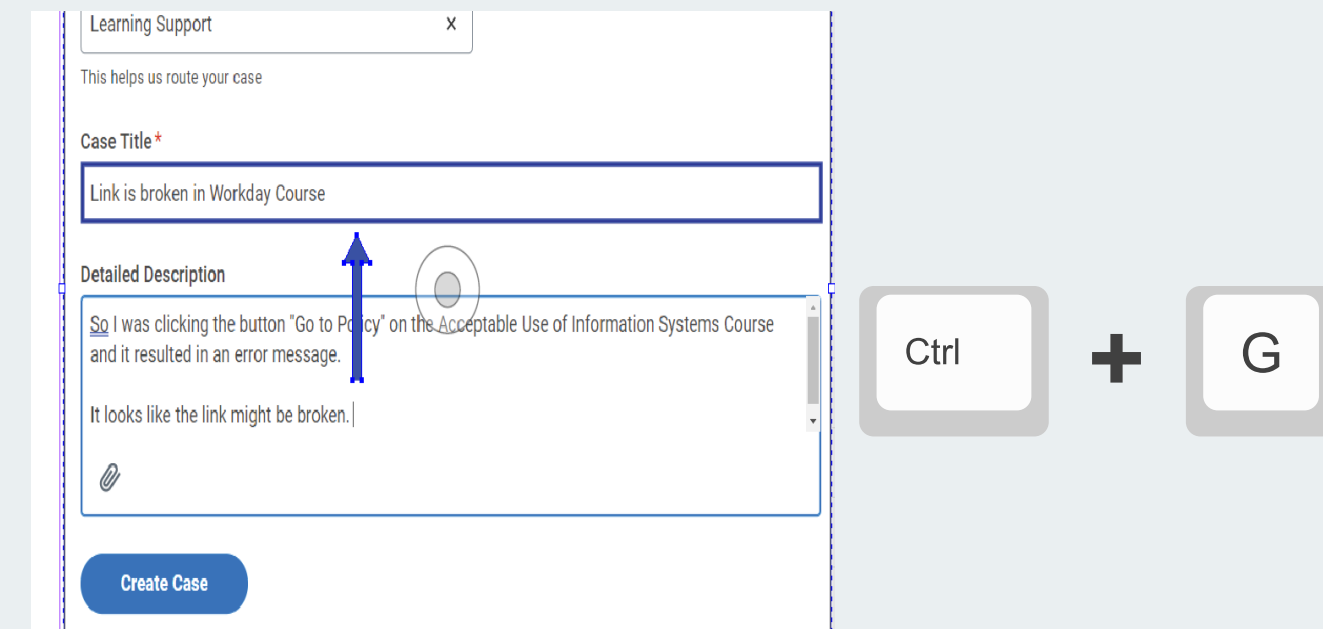


3. Read the Height (or Width if you are measuring horizontal distance) in the Control Panel

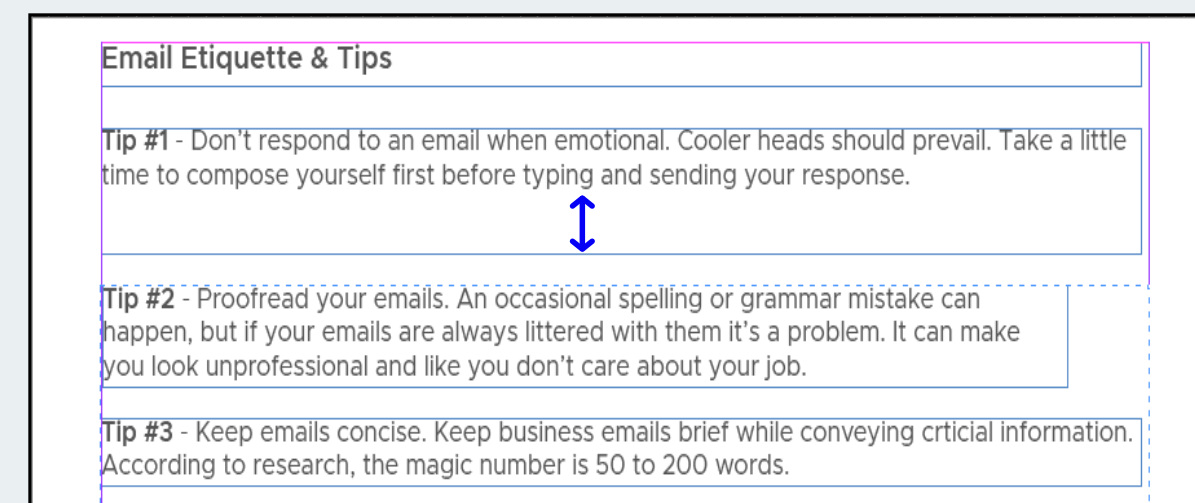


BEFORE USING DISTRIBUTE SPACING

In order to utilize the distribute vertical spacing feature effectively, you should:



- [Group](#) objects together with the screenshot so they remain in their correct position in relation to the screenshot when you use the distribute spacing feature

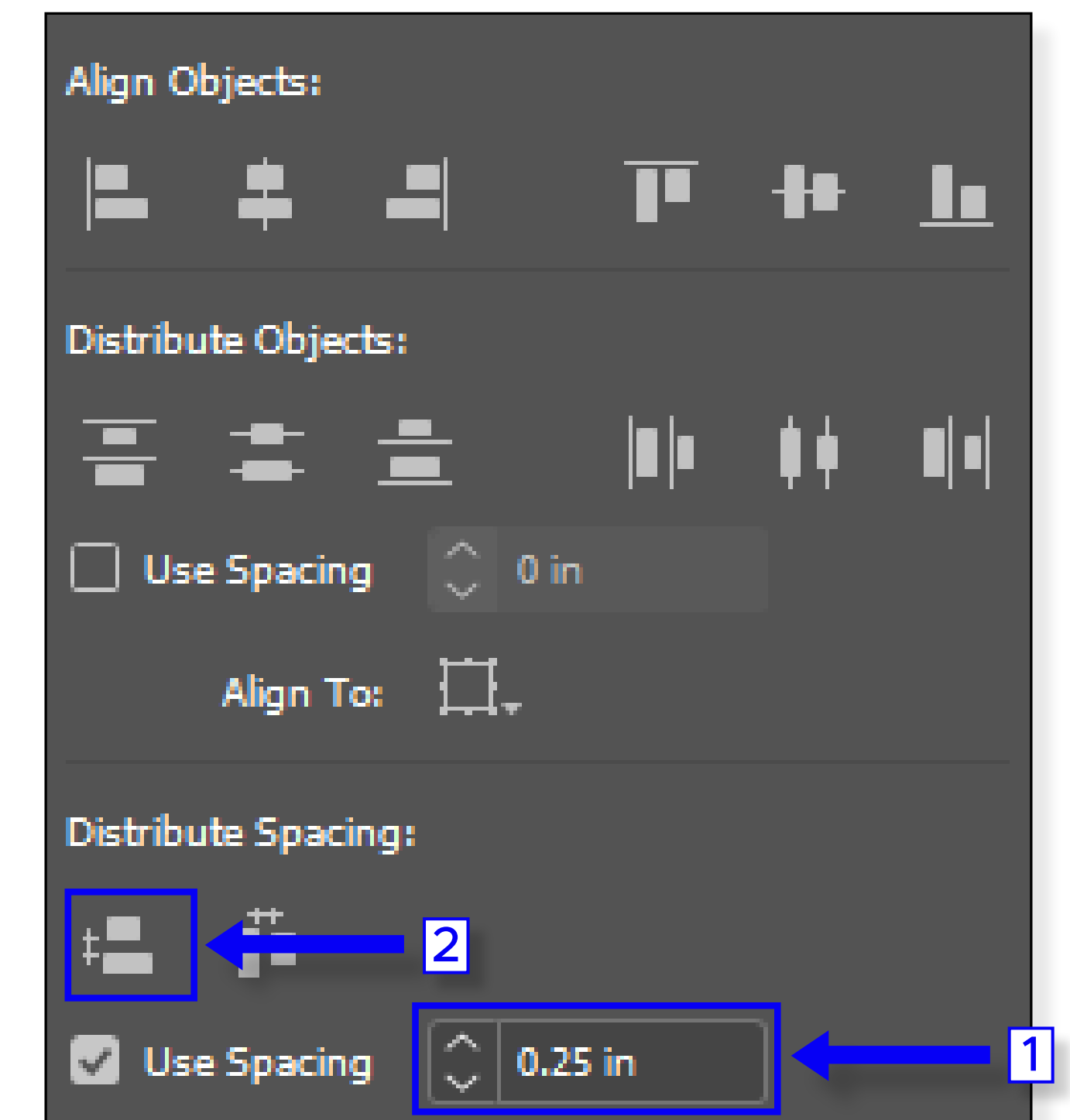


- Ensure the text boxes and image frames are only as large as is necessary to fit the contents. The above screenshot is a bad example of this

SPACING ELEMENTS

Spacing between elements should be consistent.

Set the spacing of objects by selecting the objects you wish to space, setting the spacing amount (with the “Use Spacing” Checkbox selected), and using the [Distribute Spacing- Distribute Vertical Space](#) Button (within the Align Panel).



AROUND HEADERS & SUBHEADERS

MS Teams & Cisco Softphones

↕ 0.25 inches

Internal Communication

Use Teams over the Cisco Softphone for internal communication with other PERS Staff. Conversely, the Softphone is intended for external communication: with members, employers, etc.

Generally, a Header will be the start of each section of documentation; such as Microsoft Teams and Cisco Softphones within the Teams Job Aid. Spacing between Headers and the start of a related Subheader or other related section element should be 0.25 inches.

Access the PERS Intranet Homepage

↕ 0.25 inches

1. Open the browser you have set as your default browser.
2. Open the [PERS Intranet homepage](#).

The space around Headers should be the same as that for Subheaders: 0.25 inches

ELEMENTS OF SAME STEP/SECTION

Your forearms are not parallel with the floor while typing: Install an Adjustable Keyboard tray.

↕ 0.1875 inches



Spacing between elements within the same step number or section should be 0.1875 inches (e.g. text box, screenshot).

Spacing in this style guide is included heavily by [Gestalt's Proximity Principle](#); that is like elements should be grouped closer together. This is why the spacing is closest between elements of the same section or step number.

AROUND COMMENTARY BOXES

Complete the Ergo Desk Modification Form when you need to make ergonomic adjustments to your in-office desk. This can include changing the desk height, installing an adjustable keyboard tray, etc.

↕ 0.25 inches

All In-Office adjustments to Workstations need to be performed by facilities. This is to protect you from injury.

There is one other exception to the guideline of spacing elements of the same step or section: commentary boxes.

1. Fill in your name and your (PERS) email in the Manager/Supervisor section.

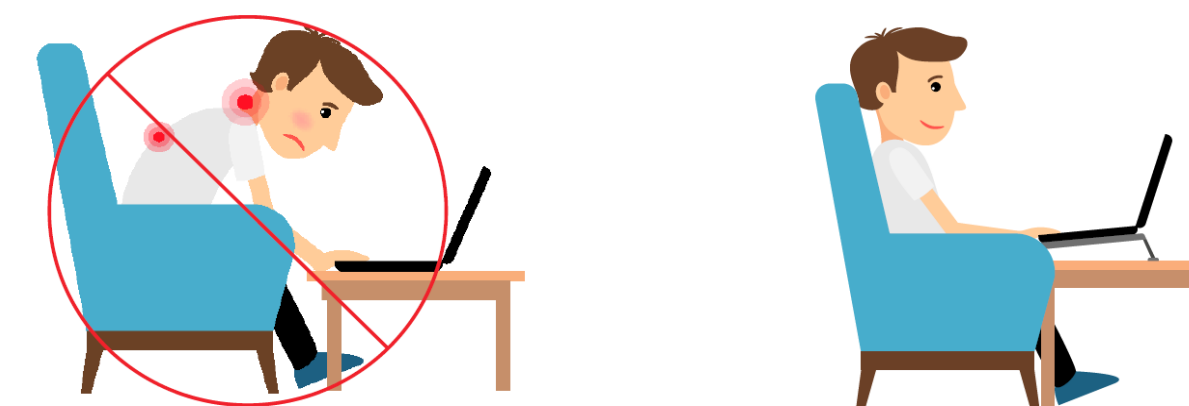
↕ 0.25 inches

Please note that only those with either "Manager" or "Supervisor" in their classification (or job title) are eligible to be entered into these fields. Examples include Business Operations **Manager** 1 and Business Operations **Supervisor** 2. Lead Workers are NOT eligible to fill in the signing role of a Manager.

Spacing between Commentary boxes and other elements within the same step or section should be 0.25 inches.

ELEMENTS OF DIFFERENT STEPS/SECTIONS

Tips for Working on the Go



Watch the following [video excerpt from SAIF for tips on Working on the Go and Cost Effective Ergonomic solutions for your home office.](#)

↕ 0.375 inches

Further Questions

If you have further questions on this job aid, or need any other support from the training team, [create a Help Case in Workday and request learning support.](#)

Spacing between elements in one step or section and the start of a new step or section on the same page should be 0.375 inches.

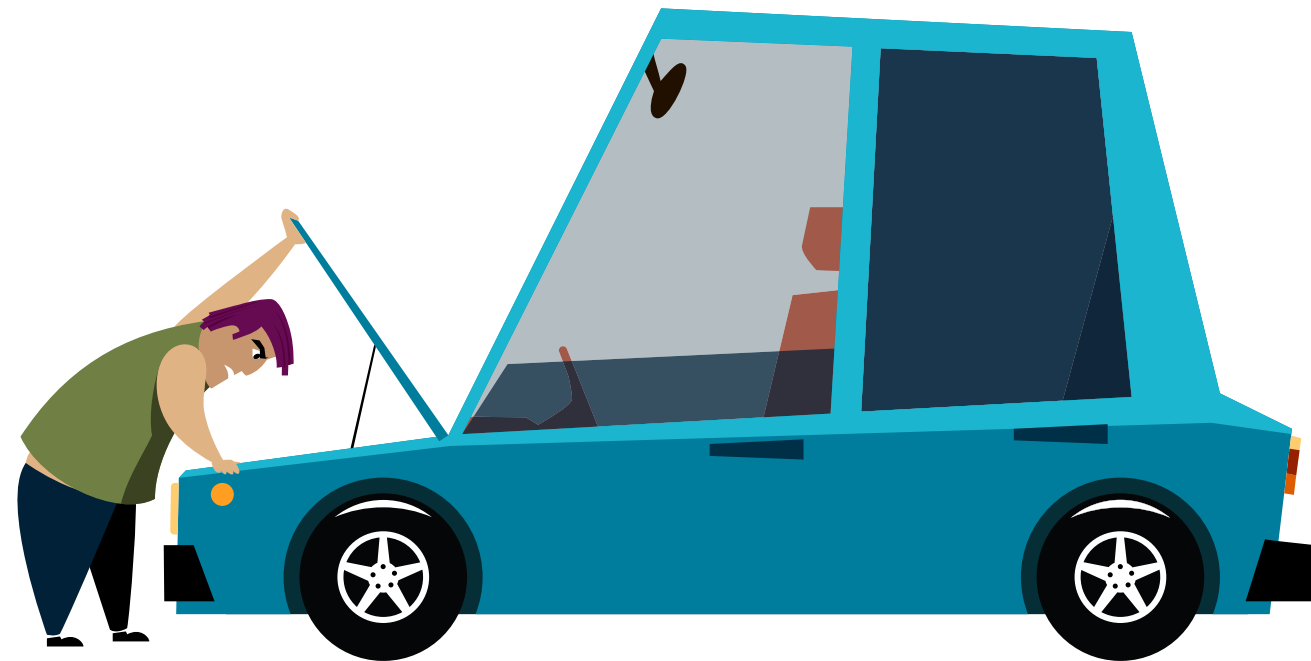
10. Repeat Steps 5-9 as needed. You may wish to have a different signature for internal/external communications and for different roles within the organization you may have.

↕ 0.375 inches

11. Choose your default signature settings via the drop-down menus.

APPENDIX

OVERVIEW



As stated in the Overview Section, this Appendix gives you the ability to “look under the hood” of the various stylistic elements present in the documentation template; from arrows to paragraph styles. You may find this information to be useful when creating a new paragraph style or other stylistic element.

[Load paragraph styles](#) from the template document into your current one rather than trying to copy the settings found here. Likewise, use the arrows and commentary boxes found within the template rather than trying to copy the settings found here to create an identical stylistic element.

SCREENSHOT RELATED ELEMENTS

Blue Numbered Boxes 1

- Font: Metropolis Medium, 16Pt, #0600F5
- Paragraph Border: 1.5 Pt, Solid, #0600F5
- Paragraph Shading: #ffffff
- Baseline Shift: -0.5 Pt

You may need to resize the text frame after the paragraph style has been applied.

Arrows

- Width: 0.2125 inch
- Height: 0.8333 inch
- Fill: #0600F5

SHORT DOCUMENTATION

Title in Header

- **Metropolis SemiBold**
- 16Pt
- #000000

Objectives in Header

- Font: Metropolis Regular, 13Pt, #000000
- Hyphenation: No
- List Type: Bullets
- Left Indent: 0.3125 inches
- First Line Indent: -0.3125 inches
- Space Before: 0.03 inches

LENGTHY DOCUMENTATION

“Title on Cover Page”

- **Metropolis SemiBold**
- 20Pt
- #000000
- Alignment: Center

Objectives on Cover Page

- Font: Metropolis Regular, 13Pt, #000000
- Hyphenation: No
- List Type: Bullets
- Space Between Paragraphs Using Same Style: 0.1875 inches
- Space Before: 0.125 inches
- Left Indent: 0.4375 inches
- First Line Indent: -0.4375 inches

TABLE OF CONTENTS STYLING

TOC Title

- Font: **Metropolis SemiBold**, 24Pt, #000000
- Space Before: 0.125 Inches
- Space After: 0.0625 Inches

TOC Level 1 (Headers)

- Font: **Metropolis Medium**, 15Pt, #000000
- Space Before: 0.1875 Inches
- Space After: 0.0625 Inches
- Space Between Paragraphs using Same Style: 0.25 Inches

TOC Level 2 (Subheaders)

- Font: Metropolis Regular. 13Pt, #000000
- Left Indent: 0.5 inches
- Space Before: 0.125 Inches
- Space After: 0.0625 Inches
- Space Between Paragraphs using Same Style: 0.1875 Inches

TOC Level 3 (“Further Questions” Subheader)

- Font: Metropolis Regular. 13Pt, #000000
- Left Indent: 0 inches
- Space Before: 0.1875 Inches
- Space After: 0.1875 Inches
- Space Between Paragraphs using Same Style: 0.1875 Inches

TOC Level 4 (Indented Subheaders)

- Font: Metropolis Regular. 13Pt, #000000
- Left Indent: 0.875 inches
- Space Before: 0.125 Inches
- Space After: 0.0625 Inches
- Space Between Paragraphs using Same Style: 0.1875 Inches

HEADERS & SUBHEADERS

Headers

- **Metropolis SemiBold**
- 16pt
- Character Fill: #000000

Subheaders

- **Metropolis SemiBold**
- 14Pt
- Character Fill: #555555

SEQUENTIAL DIRECTIONS

Numbered Steps

- Character: Metropolis Regular, 12Pt, #555555
- Hyphenation: No
- List Type: Numbers
- Format: 1, 2, 3, 4...
- Level: 1
- Mode: Continue from Previous Number
- Left Indent: 0.3125 in
- First Line Indent: -0.3125 in

Options

- Character: Metropolis Regular, 12Pt, #555555
- Hyphenation: No
- List Type: Numbers
- Format: A, B, C, D...
- Level: 2
- Mode: Continue from Previous Number
- Restart Numbers at this Level: After Any Previous
- Left Indent: 0.5 in

Options within Options

- Character: Metropolis Regular, 12Pt, #555555
- Hyphenation: No
- List Type: Numbers
- Format: i, ii, iii, iv...
- Level: 3
- Mode: Continue from Previous Number
- Restart Numbers at this Level: After Any Previous
- Left Indent: 0.6875 in
- First Line Indent: -0.3125 in

MISCELLANEOUS TEXTUAL ELEMENTS

TextBody

- Metropolis Regular
- 12Pt
- Fill: #555555
- Hyphenation: No

BulletPoints_Body

- Font: Metropolis Regular, 12 pt, #555555
- List Type: Bullets
- Left Indent: 0.25 inches
- First Line Indent: -0.25 inches
- Space Before: 0.0625 inches

Commentary Boxes

- Font: Metropolis Medium, 12pt, #111111
- Hyphenation: Off
- Text Frame Options:
 - Fill: #e9c99e
 - Stroke: 1 pt, black
 - [Inset Spacing](#): 0.0625 inches
 - Autosize: height

COLOR SWATCHES

Named color swatch can be selected within the [swatches panel](#).

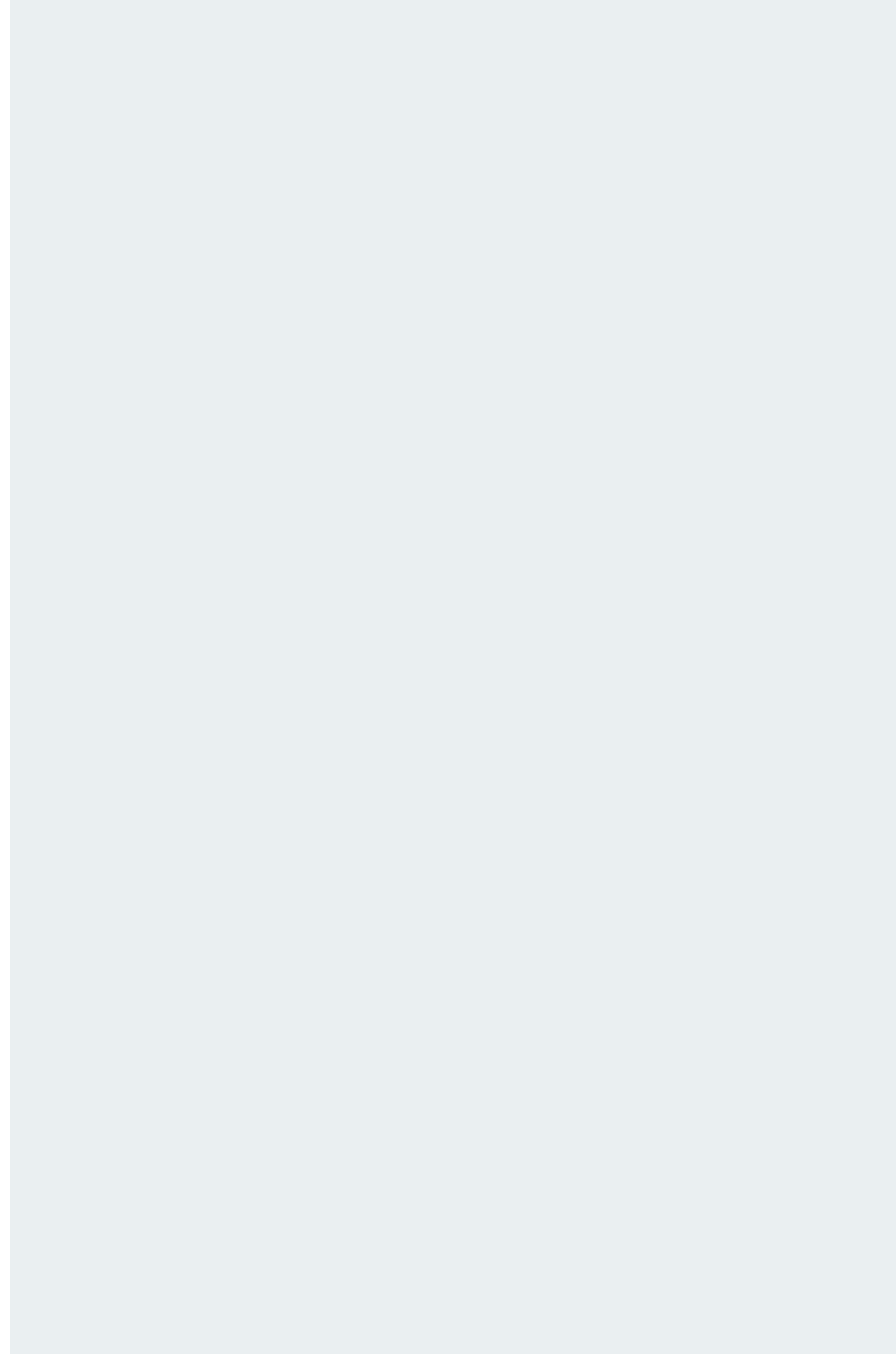
“TheJobAidBlue”

This named color swatch stands in for the hex code #0600F5.

Black

This named color swatch stands in for the hex code #000000

HEADER 1



HEADER 1