WRITTEN DOCUMENTATION

PERS STYLE GUIDE



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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:

- 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 <u>links</u> throughout the style guide which will take you to the Appendix where you can get a "look under the hood" of a design element.

0	utlook Email
С	reate Email Signatures
Be re	fore creating an email signature check with your manager to see if there are any quirements 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.
	▼ P search ① □ ● × Home Send / Receive View Help Acrobat Try the new Outlook ● OFF New Email × ① ~ ○ ⑤ → 1000 Share to Teams ○ Unread/ Read □ * ○ Search People ○ … ✓
iea	aders should be used for separating out subsections of a job aid, such as

e nder







TEMPLATE

OVERVIEW

PERS Agency Training	OREGON PERS 	Insert Date	7

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.



4

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.





TEMPLATE

SHORT DOCUMENTATION

	Workstatio After reading you will be ab • Request In- • Recognize	n Ergonomics the following inst le to: -Office Workstatic appropriate ergo	ructions outlined on Modifications nomic workstatic	in this job aid on solutions
Assessing the Nee	d for Ergonom	ic Adjustments	to Your Workst	ation
Assessing the Nee After completing the v Your Workspace in W ergonomics: Self-Asse illustrate where works to improve comfortab disorders.	course DAS-Risk-l orkday, you may i <u>essment worksher</u> tation modificatic ility and reduce th	Ergonomically Adju wish to complete th <u>et from SAIE</u> . This f ons may be necess he incidence of mu	isting he <u>Office</u> orm can help ary in order sculoskeletal	
PERS Agency 1	raining	PERS	8/15/23	3 1

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 <u>Short Documentation Section</u> 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
Advantages and Disadvantages of Work out of Class
Alternatives to Work out of Class
Procedure for Requesting WOC Approval using DocuSign
Prerequisites to Filling out the Form
Locating the Work Out of Class (WOC) Form
Designating the appropriate signing roles for the WOC Form
Filling in the WOC Form for Review
Reviewing WOC Request Using DocuSign
HR Review and Signing
Signing as the Appointing Authority
Signing as the WOC Requesting Manager
Signing as the Employee
Declining to Sign
Appendix
Alternate Way to Access Documents: Input Security Code
Further Questions
PERS Agency Training

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.









7

OVERVIEW

Crea After able • <u>C</u> • R	ate Case in Workday to Requ r reading the following instructions o to: <u>reate a Case in Workday</u> equest Learning Support from the Tr	est Learning Help utline in this job aid you will be raining Team
Did you know? You can create • Using keywords in the Glo • Via the <u>Help App</u> in Workd 1. Create a Case in Workday A. Type in "Create Case" to (Task)" from the drop do	e a case two separate ways: bal Search Bar day. o the Global Search Bar. Then, se own options.	elect "Create Case
W Here's What's Happening	Create case Trask Create Case Task Create Case (Advanced) Task Create Case for Agency Scient Anticle Create Case for Central Wildey Support by Elevated Role Anticle	O Its Monday, March 20, 2023
Timely Suggestions Case #24936: In Progress Click View Case to see more Click View Case to see more As of Friday, March 24, a member of absence: Gregory Ballenger	View Case Inces I your team has an upcoming <u>View Team Calendar</u>	Your Top Apps Learning Admin Image: Comparison of the point of
PERS Agency Trainin	g PERS	4/25/23 1

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 <u>Work out of</u> <u>Class DocuSign Job Aid</u>. 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



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



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

<u>Place a sourced vector or image within the rectangle frame</u> 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.







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 veb browsers



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

For multiple objectives, use bullet points. These bullet points are styled using the paragraph style: "Objectives-Header"

TITLE



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



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





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LENGTHY DOCUMENTATION

OVERVIEW

Meeting Etiquette			
Canceling			1
Avoid Distractions			1
Practice Active Listening .			2
Camera On/Off			3
Recording Meetings			4
MS Teams & Cisco Softphone	es		
Internal Communication			5
Interference			5
Accessing Appropriate Docu	mentation for MS	Teams	
Microsoft Documentation ve	ersus Third Party Doo		6
Documentation to Get you	Started		6
Searching for Documentatio	on on Microsoft Supp	ort	7
Further Questions			9
			5

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



TOC: PARAGRAPH STYLES

Paragraph Styles, besides allowing us to <u>quickly and easily maintain design</u> 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.

Table of Contents	
TOC Style: [Default] ~ Title: Contents Style: TOC Title	ОК
Styles in Table of Contents Include Paragraph Styles: Other Styles: Header (Headers+Subheaders) NumberedList-3-ThirdLevel (Numbere Subheader (Headers+Subheaders) << Add	Save Style Fewer Options
Style: Header (Headers+Subheaders) Entry Style: TOC Level 1 Page Number: No Page Number Style: [None] Between Entry and Number: Y Style: [None] Sort Entries in Alphabetical Order Level:	
Options Image: Create PDF Bookmarks Run-in Replace Existing Table of Contents Include Text on Hidden Layers Include Book Documents Include Text on Hidden Layers Make text anchor in source paragraph Remove Forced Line Break Numbered Paragraphs: Exclude Numbers	

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

- Header
- Subheader
- <u>Sub_Subheader</u>
- <u>Subheader_Finale</u>

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.



Contents
Overview of Work out of Class
Work out of Class Definition
Advantages and Disadvantages of Work out of Class
Alternatives to Work out of Class
Procedure for Requesting WOC Approval using DocuSign
Prerequisites to Filling out the Form
Locating the Work Out of Class (WOC) Form
Designating the appropriate signing roles for the WOC Form
Filling in the WOC Form for Review
Reviewing WOC Request Using DocuSign
HR Review and Signing
Signing as the Appointing Authority
Signing as the WOC Requesting Manager
Signing as the Employee
Declining to Sign



LENGTHY DOCUMENTATION: TABLE OF CONTENTS

SUBHEADERS

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

Above is an example of how labeling the text frame "Canceling" as a "Subheader" in the body of the <u>Teams Job Aid</u> in turn displays that text in the Table of Contents.



INDENTED SUBHEADERS

Contents
Header #1
Subheader #1
Subheader #2
Header #2
Subheader #1
Subheader #2
Sub_Subheader
Subheader #3
Header #3
Header #4
Subheader #1
Subheader #2
Further Questions

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.



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LENGTHY DOCUMENTATION: TABLE OF CONTENTS

FURTHER QUESTIONS

Contents
Overview of Work out of Class
Work out of Class Definition
Advantages and Disadvantages of Work out of Class
Alternatives to Work out of Class
Procedure for Requesting WOC Approval using DocuSign
Prerequisites to Filling out the Form
Locating the Work Out of Class (WOC) Form
Designating the appropriate signing roles for the WOC Form
Filling in the WOC Form for Review
Reviewing WOC Request Using DocuSign
HR Review and Signing
Signing as the Appointing Authority
Signing as the WOC Requesting Manager
Signing as the Employee
Declining to Sign
Appendix
Alternate Way to Access Documents: Input Security Code
Further Questions
PERS Agency Training

"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

Table of Contents	
TOC Style: [Default] ~ OK Title: Contents Style: TOC Title Cancel	
Styles in Table of Contents Include Paragraph Styles: Other Styles: Save Style Header NumberedList-2 (NumberedLists:2nd Fewer Options Subheader Subheader_Finale NumberedList-2-ThirdLevel (Numbere	
Entry Style: TOC Level 1	~
Style: Header Entry Style: TOC Level 1 Page Number: No Page Number Style: [None] Between Entry and Number: ^y Style: [None] Sort Entries in Alphabetical Order Level: 1	
Options Create PDF Bookmarks Run-in Replace Existing Table of Contents Include Text on Hidden Layers Include Book Documents Include Text on Hidden Layers Make text anchor in source paragraph Remove Forced Line Break Numbered Paragraphs: Exclude Numbers	

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





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			_				1				
Header #1											
Subheader #1	 	 		 	 				 		
Subheader #2	 	 			 				 		2
Header #2											
Subheader #1	 	 		 	 				 		3
Subheader #2	 	 			 						4
Header #3											
Subheader #1	 	 			 				 		1C
Subheader #2	 	 		 	 				 		1
Further Questions											14

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

	Pages	>	,
	Margins and Columns		
	Ruler Guides		
	Create Guides		
	Create Alternate Layout		
	Liquid Layout		
	First Page	Ctrl+Shift+Numpad 9	
	Previous Page	Shift+Numpad 9	
	Next Page	Shift+Numpad 3	
	Last Page	Ctrl+Shift+Numpad 3	
	Next Spread	Alt+Numpad 3	
	Previous Spread	Alt+Numpad 9	
	Go to Page	Ctrl+J	
	Go Back	Ctrl+Numpad 9	
	Go Forward	Ctrl+Numpad 3	
	Numbering & Section Options		
	Table of Contents		
C	Update Table of Contents		
	Table of Contents Styles		

Contents Header #1 Header #2 Header #3 Subheader #1



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 "<u>TitleonCoverPage</u>".

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

Virtual Meeting Etiquette & MS Teams Functionalities	
By the reading this job aid, you should be able to Demonstrate proper meeting etiquette 	
Decipher when to use MS Teams vs. the Cisco Softphone Access appropriate documentation for MS Teams	
PERS Agency Training PERS 6/20/23 i	

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 "<u>ObjectivesforCover</u>".





WHAT IS A PARAGRAPH STYLE?

o Paragraph Styles		» ≡
BulletPoints_Body		[a+] <i>4</i>
[Basic Paragraph]		
Header		
Subheader		
CommentaryBox		
TextBody		
Objectives-Heade		
BulletPoints_Body		
> 🖿 NumberedLists		
	B ø 1]⊀ + ₪

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 <u>Table of Contents</u>.

CREATE YOUR OWN

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









NUMBERED STEPS

Source a Profile Photo

- 1. Source an appropriate Workday Profile Photo



has the following requirements: to be easily identified

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

• Your Photo should be an individual head shot (shoulders and above) and be an appropriate professional image. See samples <u>here</u>.

• The photo should be clear, of good quality, and a view that is close enough for you

• 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.



NUMBERED STEPS

Set Up Automatic Replies

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

File Home Send / Receive View Help Acro	Try the new Outlook • off
New Email ~ 🛍 ~ 🖻 🖄 ~ 🕤 🕤	→ 🛱 Share to Teams 🗠 Unread/ Read 🔛 - 🔍 · Search People 🛛 ···

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

1. Source an appropriate Workday Profile Photo

There are two approaches to sourcing an appropriate Workday Profile Photo:

- Option A: Have the PERS Production Team take a professional photo of you
- Option B: Locate a headshot which portrays you professionally

Option 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.



- 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, add a commentary box describing each option the user has for completing that step. Finally, use the paragraph style "<u>NumberedList-X-SecondLevel</u>" 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.





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 crticial 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 resonding 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 "<u>TextBody</u>" from the Paragraph Styles panel.

BULLET POINTS

- Bullet 1 ٠
- Bullet 2 •
- Bullet 3 •

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

- the paragraph style
- **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".

1. Select the text box with which you intend to set

2. Select "<u>BulletPoints_Body</u>" from the Paragraph

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.

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
- Via the Help App in Workday B.

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





HEADERS

Crea	te Email Signatures
Befor requi	e creating an email signature check with your manager to see if there are any rements that need to be included with your email signature.
1. F tł	rom your Microsoft Outlook inbox, click on the File menu option from the ribbon bar in ne top left corner of your inbox.
File	Home Send / Receive View Help Acrobat Try the new Outlook $\bigcirc ff$ v Email \checkmark \bigcirc

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

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, <u>go here</u>. 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

Cr	eate Email Signatures
Be rea	fore creating an email signature check with your manager to see if there are any quirements 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 the top left corner of your inbox.
ら F	▼ ✓ Search

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.















CAPTURING SCREENSHOT



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



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.

Tooltip
Move the mouse over the text below:
Tooltips are one reason you may need to show the cursor Hoverpver me

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

	Q Search		4ª 🔮 👰
Here's W	/hat's Happening	It's Monday, March 20, 20	23
Timely Sug	ggestions	Your Top Apps	
@ <u>=</u> 0	Case #24936: In Progress Click View Case to see more	Learning Admi	n
		Help Workspace	ce
þ	Your Team Has Upcoming Absences As of Friday, March 24, a member of your team has an upcoming absence: Gregory Bellenger	Time	
	apooning absence. Gregory benefiger	Verify My Infor	mation

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

- Stroke: 1 pt, <u>Black</u>
- 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

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RECTANGLES

≡ menu	Q Search	¢ª 🛃 🌚
Here's	What's Happening	It's Monday, March 20, 2023
Timel	Suggestions	Your Top Apps
@	Case #24936: In Progress	Learning Admin
		Help Workspace
Ę	As of Friday, March 24, a member of your team has an View Team C	alendar Time
		Verify My Information

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 ("<u>TheJobAidBlue</u>")



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

ARROWS

Micro	osoft Support Microsoft 365 Office Windows More ~ Buy Microsoft 365 All Microsoft ~
	How can we help you?
	Forward a meeting - Microsoft Support
	On the main meeting menu (either Meeting, Meeting Occurrence or Meeting Series), in the Actions group, click Forward > Forward. In the To box, enter the email address or addresses of the people you want to forward the meeting to, and then click Send. <i>Applies To: Outlook for Microsoft 365, Outlook 2021, Outlook 2019, Outlook 2016, Outlook 2013</i>

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.

₃:29	Enter Security Code
Oregon Public Empl max.anderson@pers.or	*
8 oregon Workday 499 062 (19	
	Enter the 6-digit security code found in your authenticator app.
	Security Code
	2 Submit
Authenticator Passwords Addresses Verified IDs	

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 "<u>Blue_Numbered_Box</u>".

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.

Automatic Replies - max.anderson@pers.oregon.gov	×			
Do not send automatic replies Send automatic replies				
Only send during this time range:				
Start time: Mon 5/22/2023 V 8:00 AM V				
End time: Wed 5/24/2023 V 8:00 AM V				
Au omatically reply once for each sender with the following messages:				
Inside My Organization 📀 Outside My Organization (On)				
1 oe UI ∨ 14 ∨ B <i>I</i> <u>U</u> <u>A</u> Ξ Ξ Ξ				
Hello, I am currently out of the office and will return on Wednesday, May 24th. If you have an urgent question, please contact Shane Wallis or Sarah Diggs. Otherwise, I will respond on the day of my return.				
Rules OK Cancel				

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

USING MARGINS

Next, click the New button as shown. Signatures and Stationery ? × E-mail Signature Personal Stationery	
Selegt signature to edit Choose default signature E-meil groountr Max ANDERSON@pers.oregon.gov New messages: inone! Delete New Save Renome inone! Edit signature inone! Calibri (Body) 11 B I Automatic image: Business Card image: Business Card	
Get signature templates Cancel Cancel	Objects generally should not exten past the rightmos margin.
Next, type in the name you want to assign to your signature and click OK. New Signature Yupe a name for this signature:	

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

Create About
Search name
This person won't get any notifications about this case
Case Type*
Select the most relevant case type
General Human Resources Support
Human Resources (Confidential)
Learning Support
Payroll Support asolution

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

[Name (firs [Title] [Agency] [Program r [Section, D [Contact in	t, last) (preferred pronouns)] name] (optional, if applicable) ivision] (optional, if applicable) formation]
Signatures and Stati <u>E</u> -mail Signature E-mail <u>a</u> ccount: Sele <u>c</u> t signat	Personal Stationery tax.ANDERSON@pers.oregon.gov
Profession Profession Profession Workday Edi <u>t</u> signatur	e
Max A Traini Orego Huma	nderson (he/him) ng & Development Specialist I n PERS n Resources Section, Central Administration
503-5	98-3547

There is one **exception** to the rule of aligning all objects to the pink 0.5 inch margins: <u>options</u> when creating sequential directions.

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

Setting a <u>Ruler guide</u> of 0.82 inches may help in aligning objects to option formatting (e.g. Option B).



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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

1.	Open the P	RS Intranet Home Page in your browser.	
		1	
2.	Select the "	Forms" link from the PERS Intranet Home Page.	

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:

	Learning Support ×
T	his helps us route your case
0	Case Title *
	Link is broken in Workday Course
[Detailed Description
	<u>So</u> I was clicking the button "Go to Pc icy" on the Acceptable and it resulted in an error message.
	It looks like the link might be broken.
	Ø
U	
	Create Case

spacing feature

ip #1 - Don't	respond to an email wh	en emotional. Cooler heads should prevail. Ta	ke a little
me to comp	se vourself first before	typing and sending your response.	
		1	
ip #2 - Proo	read your emails. An oc	casional spelling or grammar mistake can	
appen, but i	your emails are always	littered with them it's a problem. It can make	
ou look unp	ofessional and like you o	don't care about your job.	
ip #3 - Keep	emails concise. Keep bu	usiness emails brief while conveying crticial inf	ormation.
According to	research, the magic num	aber is 50 to 200 words.	



• Group objects together with the screenshot so they remain in their correct position in relation to the screenshot when you use the distribute

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 <u>Space</u> Button (within the Align Panel).









AROUND HEADERS & SUBHEADERS

MS Teams & Cisco Softphones **1** 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 <u>PERS Intranet homepage</u>.

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

ELEMENTS OF SAME STEP/SECTION



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.

1 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.

PERS	BEGIN SIGNING	⑦ HELP
	PowerForm Signer Information	
	Fill in the name and email for each signing role listed below. Signers will receive an email inviting them to sign this document.	
	Signing Order: HR, Appointing Authority, Manager, Employee	
	Please enter your name and email to begin the signing process.	
	Manager/Supervisor	
	Your Name: *	
	Full Name	
	Your Email: *	
	Email Address	
	1 0.25 inches	
	w those with either "Manager" or "Supervisor" in their classificati	on (or

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

ELEMENTS OF DIFFERENT STEPS/SECTIONS



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.

Signatures and Stat	Parcanal Stationary		? ×	
Select signature to	ersonal stationery	Choose default signature		
Professional-Ext Professional-Int Workday	ernal	E-mail account: Max.ANDERSON@pe New messages: (none) Replies/forwards: (none)	rs.oregon.gov	
Max Ander Workday L Oregon Pu	son (he/him) earning Partner blic Employee Retirement Syster	n (PERS)		
	plater			



EXPORTING & UPLOADING





EXPORTING

Now that you have either created a new piece of written documentation or updated an existing one, you will need to export the InDesign File. Here is the procedure you should be following to get the best results :

1. Within InDesign, select "File" then "Export" from the Drop Down Menu



2. Change the File Name. It's recommended that you version the documentation file

xport					
\rightarrow \checkmark \uparrow \blacksquare \Rightarrow This PC \Rightarrow My Passport (D:)	> Documentation > PrinterJobAid		× ٿ	Search PrinterJ	obAid
ganize 🔻 New folder					* *
矈 Favorites	^ Name	Date modified	Туре	Size	
🐌 Links	484 Forms Order-AuxProd	7/25/2023 3:59 PM	Adobe Acrobat Docu	191 KB	
Music	Fresource_TkrjC_1563240786	7/7/2023 9:56 AM	Adobe Acrobat Docu	4,316 KB	
OneDrive	Printer JobAid V5	7/6/2023 4:33 PM	Adobe Acrobat Docu	7,728 KB	
Pictures	Printer_JobAid_V4	6/30/2023 4:08 PM	Adobe Acrobat Docu	7,715 KB	
h Saved Games	Printer_JobAid_V3	6/28/2023 10:58 AM	Adobe Acrobat Docu	6,356 KB	
Searches	Printer_JobAid_V2	6/27/2023 3:20 PM	Adobe Acrobat Docu	865 KB	
Videos	🛃 PERSLetterhead	6/27/2023 8:39 AM	Adobe Acrobat Docu	308 KB	
	🛃 Action Item Printers	5/22/2023 1:10 PM	Adobe Acrobat Docu	615 KB	
	OutsideDocumentation	7/7/2023 10:40 AM	File folder		
	PicturesofPrintersfromweekofJuly4th	7/6/2023 4:18 PM	File folder		
My Passport (D:)	PicturesofChadPressingbuttonsonmachine_Shar	6/28/2023 10:08 AM	File folder		
Network		6 /00 /0000 0.01 AM	File folder		
File name: Printer_JobAid_V6					
Save as type: Adobe PDF (Interactive)					
	T				
Document Name as					

3. Export your InDesign File as Type Adobe PDF Interactive

dobe PDF (Interactive)	
dobe PDF (Interactive)	
dobe PDF (Print)	
PS	
PUB (Fixed Layout)	
PUB (Reflowable)	
TML	
Design Markup (IDML)	
PEG	
NG	
ML	

Exporting as Adobe PDF (Interactive), allows users to click links within the PDF. This export setting is crucial to the clickable Table of Contents and the use of website hyperlinks.



UPLOADING TO FILENET

4. Set the Compression to JPEG 2000 (Lossless) and the Resolution to 300 ppi

Export to Interactive PDF		
General	Compression	
Compression Advanced Security	Image Compression Compression: JPEG 2000 (Lossless) ~ JPEG Quality: Medium ~	
	Resolution (ppi): 300	
	Export Cancel)

5. Select the "Export" Button

UPLOAD NEW FILE TO PERS' TRAINING REPOSITORY

In the instance where you are uploading a completely new piece of documentation to FileNet, use the following procedure:

1. Navigate to <u>PERS' Training Repository</u> within FileNet

Please contact Shane Wallis to be added to PERS' Training Repository within FileNet.

- 2. Open the "Agency Training Job Aids" folder
- 3. Select the "Add Document" Button
- 4. Select the "Choose Files" Button
- 5. Navigate to the location of your documentation file. Select it.
- 6. Select the "Add" Button
- 7. Right Click on the new job aid. Hover over Link then View Link.
- 8. Copy the Link
- 9. Insert the Link as a Hyperlink in the NEO Resource Directory or Share it with the appropriate party







UPLOADING TO FILENET

UPDATE EXISTING DOCUMENTATION IN PERS' TRAINING REPOSITORY

Now that you have an updated version of a Documentation file, use the following procedure:

- 1. Navigate to <u>PERS' Training Repository</u> within FileNet
- 2. Open the "Agency Training Job Aids" folder
- 3. Right click the file you wish to update. Hover over Checkout, then select Checkout only from the flyout menu.
- 4. Right click the documentation file you wish to update again and select "Check in" from the menu options
- 5. Select the "Choose Files" Button
- 6. Navigate to the location of your updated documentation file. Select it.

Leave the major version of the file checked. This means that the version of the documentation you are uploading will be

7. Change the Name of the file to"FileName _Official"

8. Select the "Check In" button

The link for the updated version of documentation is the same. You do not need to update any of the links that have already been distributed.







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

- Paragraph Shading: #ffffff
- Baseline Shift: -0.5 Pt

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

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

• Font: Metropolis Medium, 16Pt, #0600F5

• Paragraph Border: 1.5 Pt, Solid, #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

- 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

• Font: Metropolis SemiBold, 24Pt, #000000

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

- Hyphenation: No
- List Type: Numbers
- Format: 1, 2, 3, 4...
- Level: 1
- Left Indent: 0.3125 in
- First Line Indent: -0.3125 in

Options

- Hyphenation: No
- List Type: Numbers
- Format: A, B, C, D...
- Level: 2
- Previous
- Left Indent: 0.5 in
- First Line Indent: -0.3125 in

• Character: Metropolis Regular, 12Pt, #555555

Mode: Continue from Previous Number

• Character: Metropolis Regular, 12Pt, #555555

Mode: Continue from Previous Number

• Restart Numbers at this Level: After Any

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 <u>swatches panel</u>.

"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 FOR 3 COLUMN PAGE





TEMPLATE 2 COLUMN

HEADER FOR 2 COLUMN PAGE

