

Trains Style Guide

For Safety, Compliance, and Training (SC&T)
Facilitator and Participant Guides

About this document

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Version 1.0

Developer: Human Capital

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Introduction

The *Trains Style Guide for Safety, Compliance, and Training Facilitator and Participant Guides* provides guidelines that must be adhered to in the design and development of Facilitator and Participant Guides produced by and for Trains. This style guide outlines standards determined by Trains to promote consistency across the classroom training materials.

This style guide was designed to accompany the Trains brand identity guidelines. Before using this style guide, you should be familiar with the Trains brand identity guidelines outlined in the document entitled, *Our Brand*. This document is located on the Trains Branding page on the Trains Intranet.

Other documents to be familiar with are the following:

- *Tone of Voice*, which describes how to write, speak, and operate to align to the outward expression of the Trains personality. This document is located on the Trains Branding page on the Trains Intranet.
- *Trains Writing Standards*, which provides standards for writing training documentation. This document is located on the Instructional Design Center of Expertise SharePoint site.

After the *Introduction* and *Overview* sections, this document is organized by topic, alphabetically. Use the *Table of Contents* section to find topics quickly.

Overview

Template Format

The Facilitator Guide and Participant Guide template is **two** files: one file for the Facilitator Guide and one file for the Participant Guide.

Note: *A PowerPoint template is available as well.*

Required Elements

Participant Guide

All Participant Guides must include the following elements.

- Confidentiality/proprietary information statement
- Table of contents
- Course overview
- Performance objectives
- How the course supports the Trains Vision, Mission, and Goals
- How the course supports the Trains Safety Statement

- Summary/review of learning objectives

Facilitator Guide

In addition to the list above for the Participant Guide, the Facilitator Guide must also include the following elements:

- Directions on how to use the Facilitator Guide
- Icon descriptions that facilitator will see
- Background information on the course
- Course preparation
- Course map (Training at a glance): each day broken down by modules, durations, lesson titles, and topics

- List of materials & preparation steps
- Module map (Timing & agenda): duration, lesson titles, topics, learning objectives
- Step-by-step directions to facilitate the course
- Answers to any assessment questions listed in the Participant Guide

Template Sections

The table below describes the sections of the template files.

Section	Description
About this document	Contains information about the document (creation date, version, course number, and the department that created the guide)
Table of contents	Lists the modules, lessons, and headings (levels 1, 2, and 3) in the Facilitator and Participant Guides
Facilitator overview	Contains information about the course for the facilitator Not included in the Participant Guide
Introduction	Contains information about the course for the participant
Content module	Contains course content; used as many times as needed to cover the course content
Appendix	Contains the Safety Briefing Guidelines; other documents/topics can be added as needed

Trains Logo

The Trains logo represents who we are, what we do, and what we believe in. It is important to be consistent. When using the Trains logo, follow the Trains brand identity guidelines outlined in the document entitled, *Our Brand*.

Captions

A caption is text that appears below an image or graphic. Captions should fully explain the significance of the image/graphic but still be succinct.

Format captions as described below.

- Use the style *FG/PG caption*.
- Begin with a capital letter.
- Most captions are not complete sentences, but merely sentence fragments, which should not end with a period. If any complete sentence occurs in a caption, then all sentences, and any sentence fragments, in that caption should end with a period.

Color Palette

We use a limited color palette for printed and electronic documents. The following colors are used as standard colors. The palette provides a reference for use the creation of text design, shapes, smart art, and arrows.

Facilitator and Participants Guides should be printed in color (whenever possible) for use in the classroom to aid in learning. However, when printing for other than classroom use (e.g., reviewing drafts), print in black and white.

Dark Blue R000 G088 B131	Sky blue R000 G188 B226
	Light green R206 G224 B007
	Orange R249 G155 B012

Module Covers

The covers for the individual modules are set up differently from the guide covers. When additional content modules are created, module covers need to be added.

Document Control

Versioning

Documents should be versioned as you are working.

- After updating a draft document; this increases the version by 0.1.
- When a document is ready to be printed for the first time or subsequent printings after updates were made; this increases the version by 1.0.

Version Numbers and Dates

Version numbers and dates should be listed once in each module of the Facilitator and Participant Guide. A table has been added to the beginning of each template file to include the information shown below.

About this document

Month Year

Version

Course Manager: Michelle Lutz

QA/QC Manager: Trent Bartholomew

Developer: *Insert Your Name*

Naming Conventions

Include the version number in the file name. File names should be saved in the following format, so they are easy identified by others:

Course title_Document type_Version Number

- Examples:
- Chainsaw Safety_FG_Ver .4
 - Chainsaw Safety_JA_Starting a chainsaw_Ver .1

Below is a list of Document type abbreviations to use when saving training materials.

Document type list

Abbreviation	Description
FG	Facilitator Guide
PG	Participant Guide
PPT	PowerPoint
JA	Job aid
RG	Reference guide
QA	Question and answer document

Facilitator Notes

There are three components to the notes on the Facilitator Guide pages:

Icons	Actions	Participant materials (e.g., PowerPoint slides)
	<p>Read each courtesy point.</p> <p>Ask: <i>Is there anything you would like added to the list?</i></p> <p>Obtain agreement on these courtesy points (e.g., by asking for a verbal agreement or by raising hands.)</p> <p>Explain that if anyone does have an issue with one of the items and would like to discuss it privately, he/she should see you before the end of the day.</p>	

Sample facilitator notes from the Facilitator Guide

Icons

Icons help quickly relate what action the facilitator should be performing. The following icons should be used consistently in Facilitator Guides.

Icon name	Icon	What the icon signals you to do
Activity		Facilitate an activity (e.g., individual, pair, triad, or whole class activity)
Assessment		Administer an assessment (e.g., a quiz or test)
Break		Initiate a break in the instruction
Check		Check for understanding before continuing onto the next topic
Flip chart		Utilize flip chart paper

Icon name	Icon	What the icon signals you to do
Handout		Distribute a handout
Key point		Emphasize something in the content
Objectives		State the objectives of the module or of a lesson
Participant Guide		Refer to a page in the Participant Guide
PowerPoint slide		Refer to a slide in the PowerPoint presentation
Role play		Facilitate a role play
Speaker		Indicates what a guest speaker should do/say
Transition		Transition from one module or topic to another

Actions

The actions describe what the facilitator should be doing, saying, etc. Follow the guidelines below when writing the facilitator actions. Each action should be:

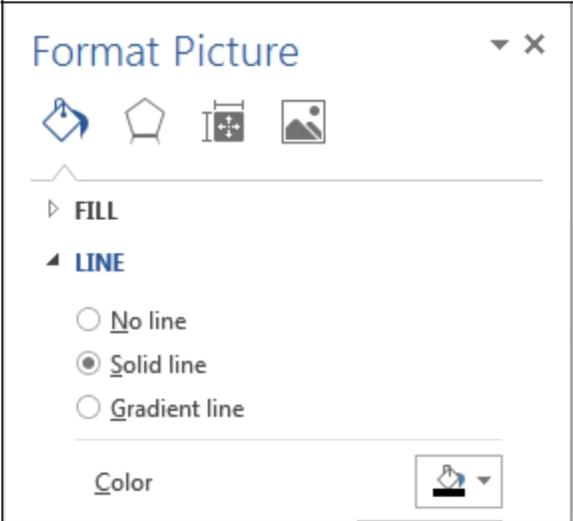
- Concise
- Begin with an action verb; use **bold font** for the initial action verb

PowerPoint slides

Use the last column to insert PowerPoint slides related to the facilitator’s actions.

To insert slides into the Facilitator Guide, do the following:

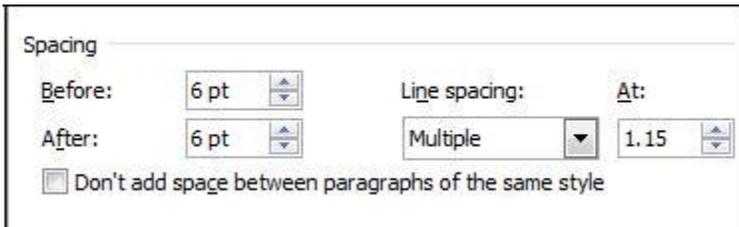
STEP 1	In PowerPoint, copy the slide from the presentation.
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STEP 2	In Word, paste the slide in the last column of the Facilitator Guide page.
STEP 3	<p>Select the Format tab. In the Height field, type 1.2 and press Enter.</p> <p><i>The PowerPoint slide should fit in the table cell.</i></p> <p>Note: <i>If the Format tab does not display, select the image of the PowerPoint slide first.</i></p>
STEP 4	Right click on the slide and select Format Picture .
STEP 5	<p>Do the following in the Format Picture window:</p> <ul style="list-style-type: none"> • Select Line, then Solid line. • For the color, select black. 

Bullet and Numbering Style

The key characteristics of bullets are as follows:

- Levels – Our bullet styles allow for three levels of bullets. Use the third level sparingly.
- Spacing – All levels of bullets are set to the specifications shown below.



Below are the specifications for each style. The last column lists the corresponding Style name used in the template.

Bullet / numbering styles	Description	Symbol	Indent
First level	Small square, black	Winddings 167 [■]	
Second level	Small open square, black	Winddings 250 [□]	
Third level	Dash, black	Arial En Dash [–]	

Formatting

- Use **bold typeface** to highlight:
 - Field names
 - Menu paths
 - Tabs
 - Buttons within the document
- Use *italic typeface* to highlight:
 - Screen names
 - References to other sections of the document, including appendices
 - References to other course titles
- Use brackets [] to enclose:
 - References to keyboard buttons
- Underlining for emphasis is now obsolete, a relic from the typewriter are; use *italics* instead. Also, do not use underlining for headlines. Underlines should only be used for links.

Graphics

Per industry standards and because adults do not relate to cartoonish illustrations, do not use clip art in any Trains training materials. Only use graphics that are relevant; in other words, use graphics only to support the content. Other considerations follow.

- Consider the size and relevance of graphics within the training materials. Size will be determined based on training output (e.g., Participant Guide, job aid, etc.) Small graphics can be difficult to interpret and difficult to read if they contain text. Giant graphics can be overwhelming.
- Graphics should always reinforce the words. Graphics are not necessary on every page. If a graphic is not needed to illustrate or reinforce an idea, do not use one. Do not make use graphics just to fill space.
- Keep it simple. Avoid unnecessary visual clutter, redundant labels, and other information that does not serve a purpose.
- Be consistent with the graphic effect, if any. Graphics should belong together as a package.

Photographs

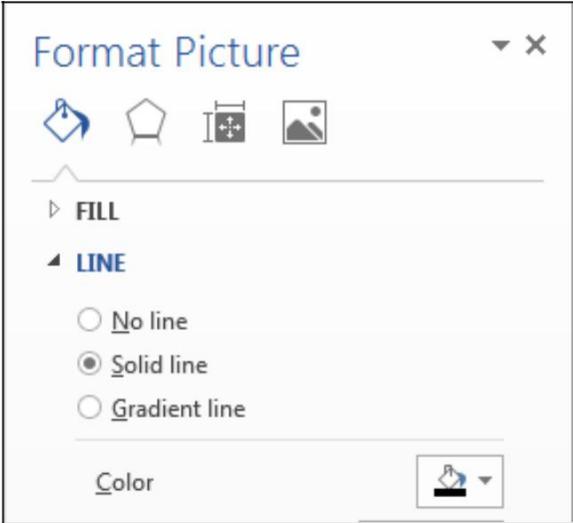
Select photographs from the sources listed below.

- Internet; however, ensure there are no copyright issues
- Take your own photographs
 - When taking pictures or video of people or objects on Trains property, you must get a signature on the *Consent and Release* form.
 - Photos of employees: Uniforms must be in complete compliance with the standards manual.
 - Photos of objects: Ask the person in charge of the location to sign the form.

Screen Captures

- Screen captures should always be readable.
- Add borders to screen captures; use the following formatting:

STEP 1	Right click on the capture and select Format Picture .
STEP 2	Do the following in the Format Picture window: <ul style="list-style-type: none"> • Select Line, then Solid line. • For the color, select black.



- Place screen shots on the page in a logical way, taking into consideration space available, layout, and call out placement (see below). There is no standard for the size or placement of screen captures on the page.
- Use consistent terminology to refer to the components of a software environment. Refer to *Trains' Writing Standards* document and *Microsoft Manual of Style for Technical Publication* for software terminology.

Call Outs

If items within a screen capture need identification, follow the specifications below for using call outs.

- Keep arrows small. Per instructional standards, you should never use big arrows because they are distracting and defeat their purpose. It has been proved that end-users focus more on a big arrow than the actual pointed field or content.
- Place call outs near what they are identifying in order to use the shortest arrow possible.

Use colors from the color palette described in this document. Be consistent with the color(s) chosen.

Headers and Footers

Header

The headers should include the bulleted information below.

- Facilitator Guide or Participant Guide
- Trains logo

Footer

The footer should include the following:

- Page number
- Proprietary / Confidential
- Course Title

Headings

Effective headings are critical in getting your audience to read and navigate the rest of the document. At Trains, we write clear, descriptive, and concise headings. We use formats that enhance the readability and navigability of the writing.

- Headings should be simple and direct.
- Use logical sentence structure and active voice.
- Avoid abbreviations and acronyms not immediately recognized by the reader.
- Be sure your headings are not ambiguous or have hidden, unintended meaning.
- Use normal punctuation as you would when writing a sentence with these notable exceptions:
 - Do not end the heading with a period.
 - Commas may be used instead of the word *and*
- Headings should always flush-left (not centered).
- For multi-line headings, break at logical intervals. Avoid splitting verbs (e.g., has increased), splitting hyphenated words (e.g., brand-name), and ending lines with prepositions.
- Use initial capital letters on the first word and proper nouns only; example:
 - Correct heading capitalization: Exiting a train safely
 - Incorrect heading capitalization: Exiting a Train Safely

Margins

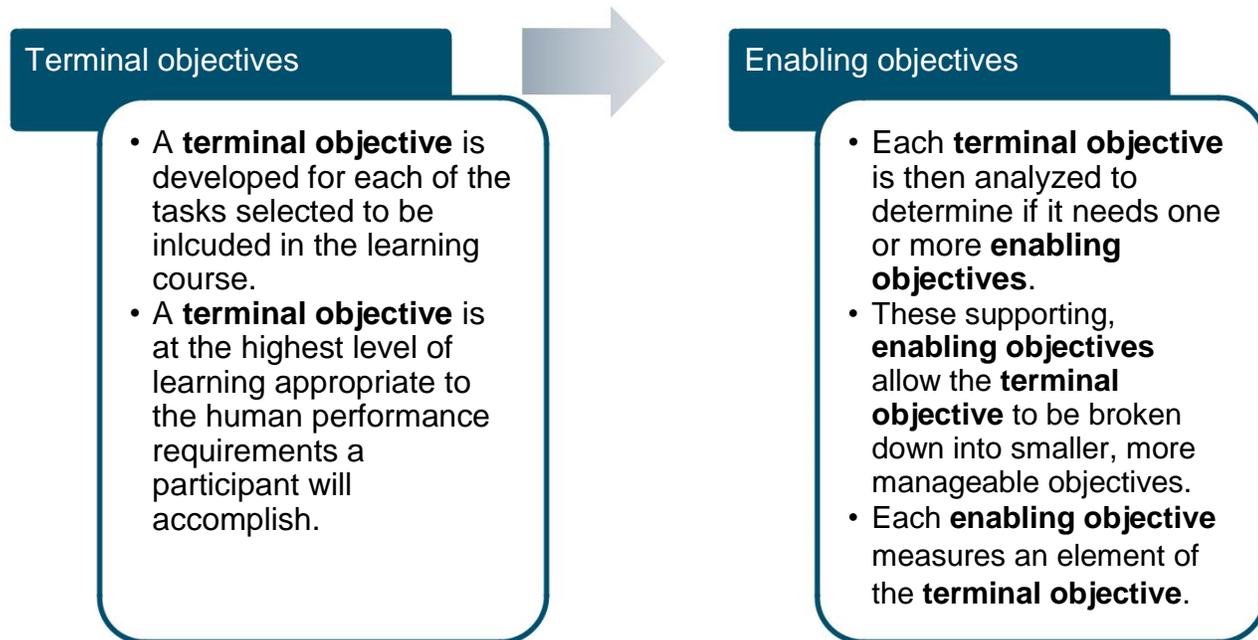
The cover page of both guides have the same margin settings. The margins for the remainder of the documents differ.

- Facilitator Guide – half inch for top and bottom; one inch for left and right margins
- Participant Guide – half inch for top and bottom; one inch for left and right margins

Objectives

The Facilitator and Participant Guides include two types of objectives, performance objectives and learning objectives.

- **Performance objectives** should be listed in the *Facilitator Overview* and *Introduction* modules.
- **Learning objectives** should be listed in each content module.



All objectives should include the following:

- Action/behavior word
- Condition under which the job will be done (with or without what?)
- Level of achievement (quality, quantity, and/or speed)

Quick Parts Gallery

The Quick Parts Gallery is used to create, store, and find reusable pieces of content. There are several content items that need to be created and stored in the Quick Parts Gallery in your version of Word, so that you can use them as needed in the template. It is important that all users of the Facilitator and Participant Guide templates use the selected content pieces for the Quick Parts Gallery, so that guides are consistent for participants and facilitators.

Using the Quick Parts Gallery

STEP 1	Open the Facilitator or Participant Guide template.
STEP 2	Click the Insert tab and then select Quick Parts .
STEP 3	Choose the selection from the gallery that you need. The item will be inserted into the document.

Table of Contents

The table of contents (TOC) contains the titles of the modules and lessons. Within each lesson, the three levels of topics (FG/PG Heading 1, 2, and 3) should be included.

Tables

The key characteristics of tables are as follows:

- Table headers
 - Shading fill: Trains blue
 - Font: Arial, 11pt, white
 - Repeat as header row at top of each page
- Rows
 - Arial, 11pt, black
 - Spacing: 6 pt before and after
 - Do not allow row to break across page
- Borders
 - ½ pt, Trains blue
 - No borders on either side of table

Inserting tables with Quick Tables Gallery

When you need to include a table in the Facilitator or Participant Guide, use the Quick Tables Gallery.