

Style Guide for NDSA Publications

A guide for writers and reviewers of NDSA publications. This replaces the [CLIR formatting guide from 2014](#).

The [Publishing Template](#) is what the CaPs Publishing Team will apply to published reports for consistency. To use the template, make a copy and start writing your document using the applied settings and formatting.

Copyright Information

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Preferred citation

General Formatting

Use Arial font unless otherwise specified. All text should be black unless otherwise specified. Use the following font sizes for specified report components:

- **Report title (use Heading 1):** size 24
- **Subtitle (at top of page):** size 16, bold, color #2265ae
- **Alternate title (beneath NDSA logo):** size 14, bold, color #2265ae

- **Authors' names:** size 12
- **Level 2 Headings (Table of Contents, About the NDSA, Introduction, etc.):** size 16, color #2265ae
- **Subheaders (Level 3 Headings):** size 14, color #2265ae
- **Additional Subheader (Level 4 Heading):** size 12, color #2265ae
- **Header text:** size 9
- **Body text:** size 12
- **Links:** color #2265ae. Underline links.
- **Footnote text:** size 10

In general the Chicago Manual of Style formats should be used. Some of the most common formatting to be used within the report body is listed below.

- **Report Titles:** should be in italics when in the text of the report/document
- **Numbers:** Spell out numbers under 10, use numerals for 10 and above, except at the beginning of a sentence. There is an exception for percents:
 - **Percents:** Numerals should be used for percentages (including 1-9) unless it is at the beginning of a sentence. In which case it should be spelled out.
 - **Rounding:** When rounding, round up with the number is 5 or higher. (i.e: 43.5 would be 44 and 76.2 would be 76 and 73.825 would be 73.83)
- **Citations:** Should use footnotes with authors names listed as first name last name. Details and examples provided in the citation section below.
- **Hyperlinks:** embed hyperlinks within meaningful text, rather than using text like “Click here” or including a URL on its own.
 - Examples:
 - Do: More information is available at the University of Minnesota’s [Accessible U website](#).
 - Don’t: More information is available at the University of Minnesota’s Accessible U website. Click [here](#) to view it.
 - Don’t: More information is available at the University of Minnesota’s Accessible U website:
<https://accessibility.umn.edu/what-you-can-do/start-7-core-skills/links>

Line Spacing

- Table of Contents: 0.5
- Spacing between section headers and subheaders is 1.15 with a space before and after H2, H3, H4...
- Margins: 1 inch all around (top, bottom, left, right)

Visual References

When using visual references in the report, use appropriate descriptors for the graphics. The report may include both tables and images or charts; label them and reference them as such. Additional guidance: <https://writingcenter.unc.edu/tips-and-tools/figures-and-charts/>

- **Figure:** Use figure for images, screenshots, and charts.
- **Table:** Use when adding in a table directly into the document.
- **Color and contrast:** Choose a color so that the text against the background is easy to see. Avoid red and green. Use a solid border color around parts of a pie graph or bar

graph. The text in graphs and charts should have a contrast ratio of 3:1. You can use these tools to check contrast:

<https://webaim.org/resources/contrastchecker/>

<https://www.siegemedia.com/contrast-ratio>

<http://colorsafe.co/>

The default settings of Chart Wizard in Excel are not accessible - use formatting tools to change colors and line styles. Don't rely on color alone to convey meaning - add a text label or use different patterns on wedges in a pie chart, or bars or lines in a graph. Ensure there are labels given in the chart for title, horizontal and vertical axis, and data points. You can label directly on the graph rather than using a legend, or use data point callouts.

- **Alternative text:** Visual representations (charts, graphs) must have alt text which is read by screen readers and it should be a short summary naming the chart type and what kind of data is being shown. Think about the role of the graphic, and describe only what the reader needs to know as well as giving any contextual information that will make it clear. Explain the data categories, trends, and maximum and minimum values. Don't repeat information given in the main text. If there are different colors, explain what the colors represent, but only if they are significant. To add alt text, right click on the graphic and select "alt text."
- Since alt text can't contain all the information in a complex chart, include a summary of the chart in the body of the paper itself. Alternatively, you can provide a table in the document or a web link to a spreadsheet with the data. If providing a table, ensure it has header and caption rows. (Remember the screen reader will read each cell one by one from left to right, top to bottom.)

Accessibility guidelines: The W3 WCAG guidelines are here:

<https://www.w3.org/TR/WCAG/#distinguishable>

Examples:

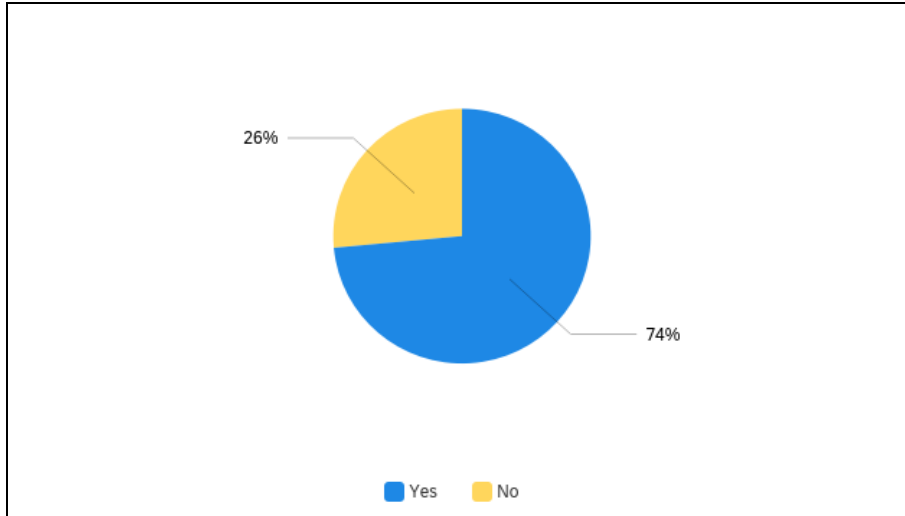


Figure 1. Responses to “Does your organization use separate storage systems for access and preservation services?”

Alt text: Pie graph showing numbers of respondents who use separate storage systems for access and preservation services based on yes/no responses. The majority use separate systems.

Summary in body of paper: A pie graph shows the numbers of respondents who use separate storage systems for access and preservation services. 74% use separate systems while 26% do not.

Table: Figure 1. Responses to “Does your organization use separate storage systems for access and preservation services?”

Response category	Percentage of respondents
Yes, use separate storage systems	74%
No, do not use separate storage systems	26%

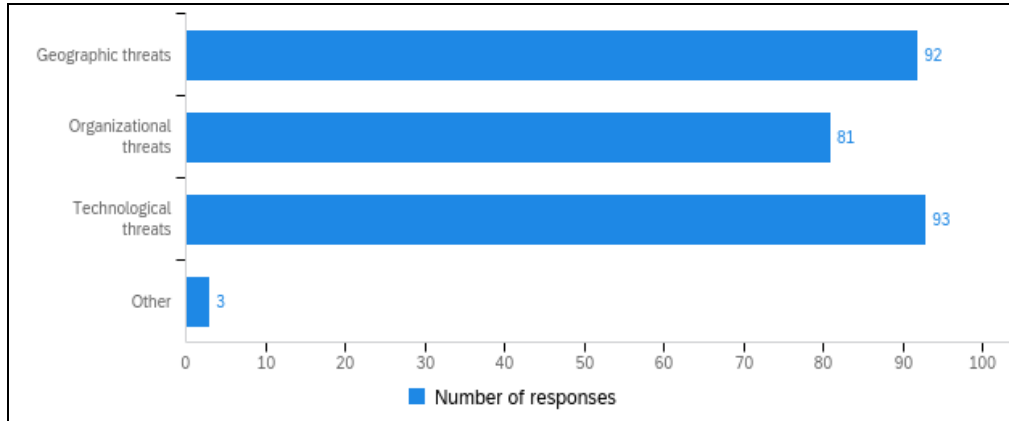


Figure 12. Potential threats respondents are protecting against by having copies in distinct places.

Alt text: Horizontal bar graph showing potential threats respondents are protecting against by having copies in distinct places. There are four response categories. The results show the majority are protecting against technological and geographic threats, with a slightly smaller number protecting against organizational threats, and very few indicating other types of threats.

Summary in body of paper: A horizontal bar graph shows the types of potential threats guarded against by keeping copies in distinct places. 92 respondents indicated geographic threats, and 93 respondents indicated technological threats, with organizational being perceived as a high but lesser threat by 81 respondents. A small number (3 total) indicated other threats.

Table: Figure 12. Potential threats respondents are protecting against by having copies in distinct places.

Response category	Number of respondents
Geographic threats	92
Organizational threats	81
Technological threats	93
Other	3

- Captions:** Captions should be in Calibri 11-point font and positioned directly against the figure to which they refer (i.e. no padding between figure and caption).
 Suggest that caption sentence spacing to the table/figure can be as close as 1 point to aid with figure spacing, page breaks, etc

Formatting suggestions for visual references

- When referring to Figures/Tables/Charts in text:
 - Within a sentence use, treat it as a proper noun: Figure One
 - If at the end of a sentence use parenthetical: (fig. 14) or (table 5)

Quotes

In general, quotes in text should follow the Chicago Manual of Style [guidelines](#) which record who said what and the source. However, some reports such as survey reports may have need for anonymous quotes. Suggestions for what this looks like include:

A quote being used to support analysis or the results of the survey could either be called out or be used inline.

Call Out Quote

This is a line of text in the document that introduces the idea that there will be a comment/quote from someone. This quote is then called out and indented on the next line.

"Quote that supports the above text."

After the quote, the content continues as needed in a new paragraph. This either moves on from the quote or provides more information about the same topic.

Example shown in italics below:

The same number of respondents implied that records creators or donors may not have the technical abilities to provide such information—for example, to download and use the tool DROID. These respondents commented:

“Not all donors or offices are comfortable using transfer tools and some transfers cannot come in using these methods depending on the source.”

Similarly, nine respondents (11.53%) stated that it was problematic to get fixity information from records creators or depositors because requests were either ignored or misunderstood.

Inline Quote

One respondent said "this is a quote from the survey" which indicates some point.

Example shown in italics below:

One respondent commented, “All repository materials have fixity information to preserve chain of custody and authenticity/integrity of the records over time,” and another stated that “Creating fixity information is part of our acquisitions process for all born-digital archives.”

Footnotes

In an effort to simplify how we use references in our NDSA reports, footnotes rather than a bibliography should be used when referencing reports or other sources within a publication. Consistency throughout a document is most important rather than trying to follow an official standard style. The following formatting is requested.

Follow these general guidelines and see examples below:

- Authors’ names should be written as First Name Last Name.
 - If more than one author they should be listed in alphabetical order by last name.
 - If there are 4 or more authors, et al should be used.
- Titles of the materials being referenced should be in “quotes”
 - Titles of Journals or Books (if a chapter is being referenced) should be in *italics*
- Publisher or creator should follow the title
 - Name, location
- Dates for the published material should follow the publisher / creator
- An accessed date should follow a published date if the material was accessed online
- A web address should be provided for any materials available/accessed online
- All parts should be followed by commas
- The end should have a period

Examples:

Hint: When adding hotlinks to DOIs, the web address needs to start with <https://doi.org>

- **Book:**
 - Trevor Owens, *The Theory and Craft of Digital Preservation*, Johns Hopkins University Press, Baltimore, 100-01, 2018.
- **Website Content**
 - **Note differences when there are specific/generic/no authors**
 - *With No Relevant Date on Webpage*
 - “About EaaS,” Software Preservation Network, accessed April 3, 2020, <https://www.softwarepreservationnetwork.org/eaasi/>.

- *With Content Created Date on webpage*
 - “2018-2022 Strategic Plan,” NARA, February 2018, accessed April 8, 2020,
<https://www.archives.gov/about/plans-reports/strategic-plan/strategic-plan-2018-2022>.
 - Leah Weinryb-Grohsgal, “LC Labs Letter: April 2020,” The Signal Blog, Library of Congress, April 30, 2020, accessed May 8, 2020,
<https://blogs.loc.gov/thesignal/2020/04/lc-labs-letter-april-2020/>.
- *With Date Last Modified on Webpage*
 - “Digital Preservation Framework,” University of Minnesota Libraries, last modified April 27, 2020, accessed May 8, 2020,
<https://www.lib.umn.edu/dp/digital-preservation-framework>.
- **Reports**
 - *Without named authors*
 - National Archives and Records Administration, “2011 Records Management Self-Assessment Report,” 2011,
<https://www.archives.gov/files/records-mgmt/resources/self-assessment-2011.pdf>.
 - *With one to three named authors*
 - Matthew Farrell, Edward McCain, and Maria Praetzellis, “Web Archiving in the United States - A 2017 Survey,” October 1, 2018,
<https://osf.io/ht6ay/>.
 - *With four or more named authors*
 - Matthew Farrell et al., “Web Archiving in the United States - A 2017 Survey,” October 1, 2018, <https://osf.io/ht6ay/>.
 - NDSA Agenda Working Group, “2020 NDSA Agenda,” April 2020, DOI [10.17605/OSF.IO/BCETD](https://doi.org/10.17605/OSF.IO/BCETD).
- **Newspaper Articles**
 - Peggy McGlone, “For Third Year in a Row, Trump’s Budget Plan Eliminates Arts, Public TV and Library Funding,” *Washington Post*, March 18, 2019.
https://www.washingtonpost.com/lifestyle/style/for-third-year-in-a-row-trumps-budget-plan-eliminates-arts-public-tv-and-library-funding/2019/03/18/e946db9a-49a2-11e9-9663-00ac73f49662_story.html.
- **Book Chapters or Sections**
 - Richard Marciano, Victoria Lemieux, and Mark Conrad, “Archival Records and Training in the Age of Big Data,” In *Re-Envisioning the MLS: Perspectives on the*

Future of Library and Information Science Education, Volume 44B:179–99,
Advances in Librarianship, Emerald Publishing Limited, 2018,
<https://dcicblog.umd.edu/cas/wp-content/uploads/sites/13/2017/06/Marciano-et-al-Archival-Records-and-Training-in-the-Age-of-Big-Data-final.pdf>.

- **Journal Articles**

- Jeremy York, Myron Gutmann, and Francine Berman, “What Do We Know About the Stewardship Gap,” *Data Science Journal*, 17, p.19, August 2018, <http://doi.org/10.5334/dsj-2018-019>.
- Susan Satterfield, “Livy and the *Pax Deum*,” *Classical Philology* 111, no. 2, p.170, April 2016.

Prior to Publishing

When exporting a Google doc for publication, export Google Document as a MS Word document, then save the Word doc as a PDF to make sure the PDF is tagged for accessibility. Verify that the PDF is tagged by opening the PDF and selecting File > Properties > Description and scrolling to the bottom of the description screen, where it should read “Tagged PDF” and either “Yes” or “No.”

Recommended File types and naming conventions

What we expect for publication, file formats, and more

- i. Survey OSF pages should at least include:
 1. The report.
 2. A code book.
 3. The original data (with PII removed).