
ARL EDITORIAL STYLE GUIDE

March 20, 2012

Generally, ARL publications follow the rules in the latest *Chicago Manual of Style* (first) and Merriam-Webster (second). However, there remain many points that are not addressed by these sources and/or are left to the discretion of the author or the editor. The following serves as a general grammatical and stylistic guideline for the preparation of ARL print and online publications, attempting to ensure consistency across external communications. Portions of this text were taken from the *Chicago Manual* as well as from the *MLA Style Manual*.

Please address questions about ARL editorial style to Kaylyn Groves, Communications Program Officer, kaylyn@arl.org.

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Formatting

Font and character size

- The house serif font for body text is Palatino. A good substitute if Palatino is not available is Georgia.
- The house sans-serif fonts for distinctive headings, captions, and footers are Trebuchet MS and Frutiger.
- Font size varies among and within documents.

Line spacing

- Generally, single space lines.
- Double space lines before and after bullet points.

Spacing after periods and colons

Insert a single (not double) space after periods and colons.

Lists

When the listed items are complete sentences:

- The introductory sentence ends with a colon or a period, as appropriate.
- Each listed item begins with a capital letter.
- Each listed item ends with a period.

When the listed items are long phrases (but not complete sentences), each item begins with a capital letter and has no ending punctuation. For example:

- Going to the comic-book shop
- Reading *manga*
- Watching *anime*

Optionally, when the listed items complete the introductory sentence,

- the introductory sentence may end with a comma, semicolon, em dash (—), or no punctuation;
- the list items begin with lowercase items;
- all but the last list item ends with a semicolon;
- the second to last item ends with *and*; and
- the last item ends with a period.

Single-word lists are presented as in the following example:

My favorite ice cream flavors are:

- strawberry
- pistachio
- coffee

URLs and e-mail addresses

Per the *Chicago Manual of Style*, we do *not* enclose URLs and e-mail addresses in angle brackets, for example: <http://www.arl.org/>, kaylyn@arl.org. The exception to this is in plain-text e-mail—it is helpful to enclose URLs in angle brackets to ensure that they are transmitted as hyperlinks. It is not necessary to use angle brackets in Gmail, Word documents, PDFs, web pages, and other formatted documents when you can create a link from the URL text.

In a printed work or PDF, if a URL has to be broken at the end of a line, the break should be made *after* a colon or a double slash (/ /); *before* a single slash (/), a tilde (~), a period, a comma, a hyphen, an underline (_), a question mark, a number sign, or a percent symbol; or *before or after* an equals sign or an ampersand. Such breaks help to signal that the URL has been carried over to the next line. A hyphen should never be added to a URL to denote a line break, nor should a hyphen that is part of a URL appear at the end of a line.

It is important to include "http://" at the beginning of URLs because it clarifies that a URL is a web address rather than an FTP or other address and, in some cases, it enables automatic hyperlinking.

Punctuation

Commas

In a series consisting of three or more elements, all of the elements are separated by commas, for example: We produce books, press releases, and newsletters.

Dashes

- There are no spaces surrounding dashes.
- Em dashes (— [option + apple + numpad dash]) may be used in places where a comma or colon might separate clauses. Examples:
 - The cost was too high—both morally and financially—for her to agree to it.
 - We could see a movie, eat dinner, or go skating—whatever we do will be fun.
- En dashes (– [apple + numpad dash]) are used to indicate continuing, or inclusive, numbers:
 - 1968–1972 (but: from 1968 to 1972)
 - 6:00–11:00 p.m. (but: between 6:00 and 11:00 p.m.)
 - pp. 38–193 (but: between pages 38 and 193)
- Hyphens (-) are used when hyphenating words or non-inclusive numbers (like telephone or social security numbers).

Hyphenation

Many compound words have been officially closed and are listed in the dictionary as single words. In most cases, compound words that have not been closed yet are left open when used as a noun or as an adjective *after* a noun but are hyphenated when used as an adjective *before* a noun, for example:

A closed compound (listed in the dictionary as a single word):
 policymaking (noun), policymaker (noun), the policymaking (adj.) process, the process was
 policymaking (adj.)

Open compounds:
 decision making (noun), decision maker (noun), the decision-making (adj.) process, the process
 was decision making (adj.)
 the full text (noun), a full-text (adj.) database, the database is full text (adj.)

We are now following *Chicago* and not Merriam-Webster in leaving out the hyphen in the names of ethnic and national groups (hyphenation is regarded by some as being suggestive of bias). Examples:

African Americans
 Asian American culture
 French Canadian population

Parentheses

Punctuation that is part of a parenthetical remark belongs inside the parentheses; punctuation that is *not* part of the parenthetical remark belongs outside. Examples:

Visitors love our conference room (almost as much as we love the cake!).
She walked to the kitchen (coffee cup in hand), and then to the elevator.

Quotation marks

When a quotation ends with a comma or period, place the comma or period *inside* the quotation marks. Place semicolons, exclamation points, and question marks *outside* the quotation marks, unless they are part of the quotation. Examples:

Bob asked, "Why are you so early?"
Did Bob state, "You are early"?
Joe said, "It's too warm in the office"; Bob disagreed.
Bob disagreed when Joe declared, "It's too warm in the office."
"It's too warm in the office," Joe said.

Always use smart quotes ("like this" and 'this'), not straight quotes ("like this" and 'this').

Spelling and distinctive treatment of words

Abbreviations

When abbreviating US state names, e.g., in a bibliography, the *Chicago Manual* now prefers the US Postal Service abbreviations rather than the traditional, longer abbreviations, and no comma is needed between city and state:

Washington DC: Association of Research Libraries, 2003.
Cambridge MA: Harvard University Press, 1997.

Note that, in running text, it is preferable to spell out state names and set off the state name with commas:

Stepford, Connecticut, is a fictional town.

In general, we are no longer using periods in such abbreviations as DC, US, UK, BA, MS, PhD. But we do use periods in "a.m." and "p.m." because they are lowercase and we still use periods in initials in a person's name (T. S. Eliot, for example).

ARL and its member libraries

Write "the Association of Research Libraries" or "ARL" (without "the").

For the preferred forms of member institution names, see the list of ARL members on the website. When abbreviating member institution names, drop the words "University" and "Library/ies" to create the abbreviations, e.g., University of Arizona Library becomes Arizona, Arizona State University Libraries becomes Arizona State, Boston College Libraries becomes Boston College, Boston University Libraries becomes Boston, Boston Public Library becomes Boston Public, etc. Exceptions to this rule: CISTI, CRL, Georgia Tech, LC, Library and Archives Canada, MIT, NAL, NLM, Smithsonian, Texas Tech, Virginia Tech.

Capitalization

As a general rule, proper nouns (including professional titles) are capitalized:

President Clinton
Executive Director Charles Lowry
Charles Lowry, Executive Director, started at ARL in 2008.

The ARL Board of Directors met on Saturday.

However:

The club needs a new president.
 She is an executive director.
 The president called the meeting to order.

National-level offices of the US government: Always capitalize, e.g., the Government, the President (if referring to the President of the US), the Court (if referring to the US Supreme Court).

Association and Board: Always capitalize when referring to ARL or the ARL Board of Directors, e.g., the Association is located at 21 Dupont Circle; the Board convenes quarterly. Also capitalize when the words are part of another proper noun, e.g., the American Library Association, the ALA Board of Directors. Do not capitalize when referring to an already named association or board other than ARL, e.g., the association is located in New York; the board met on Monday.

Program vs. program: Do not capitalize when used in the names of ARL programs, e.g., the Statistics and Measurement program. Capitalize when part of a proper name, e.g., the Global Resources Program.

In titles of works in English, capitalize the initial words and all following words except articles and prepositions. In foreign-language titles, follow the conventions of that language (sentence-style capitalization in most cases.)

“Data is” or “data are”?

ARL observes the distinction that Merriam-Webster makes between specific data (plural) and data as an abstract concept (singular), e.g., “The survey data show....” but “Data is available upon request.”

E-terminology

Web site vs. website, Internet vs. internet: Follow *Chicago* (not *Merriam-Webster*), which calls for lowercasing “website” because it is a generic term but capitalizing “World Wide Web” and “Internet” because they are proper names. Also use: blog, dot-com, e-book, e-journal, e-mail, e-research, e-science, home page, HTML, online, web manager, web page, web-based, webcast, weblog, webmaster.

Note: in most situations, we spell “e-” words with lowercase letters and a hyphen. Exceptions follow:

If the word appears at the beginning of a sentence, capitalize the “e”, e.g., “E-science is a hot topic.”

If the word appears in a headline or header, capitalize the “e” and the second part of the compound, e.g., “E-Science to Be Focus of ARL/CNI Fall Forum”.

If the word is treated differently in a proper name, follow the namer’s conventions (even at the beginning of a sentence or headline), e.g., “eBay CEO Resigns”.

Instead of using “listserv” as a generic term, use “e-mail list” or something similarly descriptive. Listserv is the name of a specific mailing list processor—like Coke is the name of a specific cola—and should only be used when referring to that specific software.

Pluralization of letters, numbers, and abbreviations

Do not use apostrophes to pluralize letters, numbers, or most abbreviations:

the three Rs
 in twos and threes
 the early 1920s

YMCAs across the country
comps. and eds.

However, when it would be confusing without an apostrophe, use one:

Last semester I got two A's and two B's.

Possessives

Singular words always take 's even if they end in s, for example:

the car's engine
the press's advertising
Charles Dickens's novels
the Library of Congress's catalog

Plural nouns that end in s receive only an apostrophe:

the studies' results
the stores' hours
the Joneses' party

Irregular plural nouns that do not end with an s receive an 's. For example:

men's shoes
cacti's thorns

Numbers and dates

Number formats

Generally, spell out whole numbers from one to nine, and put others in numeric form, for example:

three
third
10
10th
5,003
4.28

But do not begin a sentence with a digit (spell out the number), for example:

Thirty-three books fell off the shelf.

And bend the general rule in favor of consistency:

The library's Henry James collection includes nine novel manuscripts, one play manuscript, and over one hundred letters.

Add commas between the third and fourth digits from the right (etc.): e.g., 12,394,583. Exceptions include:

- Page/Line Numbers: "On page 1893...."
- Addresses: "My address is 2235 Altamirano Drive."
- Four-Digit Years: "My father was born in 1942." (Commas are added in year numbers greater than four digits: "In 20,000 BC....")

Date formats

July 1999

July 1, 1999

Thursday, July 1, 1999

Thursday, July 1, 1999, was my first day of work.

Citations

In citing a work from a series, do not spell out the series number, do not preface the series number with a “#” or “no.,” and do not italicize the series title:

George Soete, *Preserving Digital Information*, Transforming Libraries 5 (Washington, DC: Association of Research Libraries, 1997).

Cite *Research Library Issues* like a journal without a volume number but with an issue number:

Ellen Duranceau and Ivy Anderson, “Author-Rights Language in Library Content Licenses,” *Research Library Issues*, no. 263 (April 2009): 33–37, <http://www.arl.org/bm~doc/rli-263-author-rights.pdf>.

In citing a webpage that does not have a print counterpart, use the following pattern (omit fields for which you don’t have information):

In a footnote: Author, “Page Title,” Site Name, Site Owner, Date Modified or Accessed, URL.
In a bibliography: Author. “Page Title.” Site Name. Site Owner. Date Modified or Accessed. URL.

Titles of websites are generally set in roman without quotation marks and are capitalized headline-style, but titles that are analogous to books or other types of publications may be styled accordingly. Titled sections or pages within a website should be placed in quotation marks. Specific titles of blogs—which are analogous to periodicals—should be set in italics; titles of blog entries (analogous to articles in a periodical) should be in quotation marks.

Website style**Formatting text using Markdown**

In general, we recommend using Markdown (a simplified coding language that Big Medium converts to XHTML) because it provides better control over formatting than Rich Text does, it’s easy to learn, and it allows the use of HTML when necessary (see the next item below on using HTML).

To select Markdown when you create a new web page, choose the Markdown radio button for Page Text near the top of the screen, just below Page Title.

In Markdown:

- *Italicize* and **boldface** words by using underscores and asterisks.
- Create a header in the text of a page by typing a pound sign (#) or pound signs (##, ###, ####) before the header text. The number of pound signs indicates the level of header.
- Insert a hard return by inserting two spaces at the end of a line.
- Create a bulleted list by using asterisks instead of bullet symbols.
- Indent text by inserting the "greater than" symbol (>) before the text you want to indent.
- Insert a horizontal rule by typing three or more underscores on a line by themselves.
- Create a textual link by surrounding the link text with square brackets followed by the URL in parentheses: This is a [link to the ARL homepage](<http://www.arl.org/>).
- Make a URL or an e-mail address turn into a link by surrounding it with angle brackets: <<http://www.arl.org/>> or <kaylyn@arl.org>

For more details about Markdown, see the Markdown cheatsheet linked to from the page edit page in Big Medium <http://www.arl.org/cgi-bin/moxiebin2/bm-help.cgi/markdown/4>

Formatting text using XHTML

If/when you do use HTML instead of Markdown, be sure to use XHTML, which is an application of XML and a little more restrictive than plain HTML. Using XHTML will make our site viewable on devices that require XHTML and will give us more flexibility in migrating our web content in the future. (Note: Big Medium produces XHTML from Markdown but does not convert hardcoded HTML into XHTML.)

The main XHTML practices you'll need to remember are:

- Use lowercase for XHTML elements and attributes
 - Incorrect: `<TD COLSPAN="2">This is a table cell.</TD>`
 - Correct: `<td colspan="2">This is a table cell.</td>`
- Close empty elements (i.e., elements without closing tags in HTML)
 - Incorrect: `
<hr>`
 - Correct: `
<hr />`
- Close non-empty elements
 - Incorrect: `<p>This is a paragraph.<p>This is another paragraph.`
 - Correct: `<p>This is a paragraph.</p><p>This is another paragraph.</p>`
- Properly nest elements
 - Incorrect: `This is italicized, bold text.`
 - Correct: `This is italicized, bold text.`
- Surround attribute values with quotation marks
 - Incorrect: `<td colspan=3>`
 - Correct: `<td colspan="3">`
 - Correct: `<td colspan='3'>`
- Do not use the ampersand character outside of XHTML entities
 - Incorrect: `<h1>Research, Teaching & Learning</h1>`
 - Correct: `<h1> Research, Teaching & Learning </h1>`

Images

You may add images such as publication covers or photos of people to web pages. Big Medium automatically sizes images when you upload them. You may specify each image's position on the page and the image's alignment. You may add a caption and/or a link from the image.

Slugnames

When creating a new web page, enter a slugname under "Page Preferences." The slugname will become the prefix of the filename, e.g., if you assign a slugname of "webpage" the filename will be "webpage.shtml". Please use short but descriptive slugnames. It is helpful if you can devise a slugname that gives us a chance of identifying the file by name if we need to later, e.g., we could tell that br223activities.shtml is the "Activities" section of the *Bimonthly Report* no. 223.

Please use the same guidelines when naming PDFs and other files to be uploaded to the site.

Checking links

When creating a new page with several links on it, please run a link checker on that page to make sure all of the links work. The W3C Link Checker <http://validator.w3.org/checklink> is a good tool for this.

Online Forms

If you create an online form using Formstack, please embed the Formstack script in an article page on our website once the form is ready to go live. This will enable us to keep the master version of the form on the Formstack site while having the form appear to live on the ARL website.

Replacing inaccurate or out-of-date files

When replacing an inaccurate or out of date file on the website, it's best to completely replace the old file with the new file so the URL stays the same. That way, all links pointing to the old URL will return the new, corrected file.

To replace a file, the new file name must be the same as the old file name, e.g., charts.xls.

In Big Medium:

- Go to Libraries-->Document Library

- Locate the old file in the document library

- Click on the document title, e.g., "University & Library Expenditures - Annual graph data"

- Verify that your new file name is the same as the old file name, e.g., charts.xls

- Click the link to "Replace this file"

- Use the "Browse" button to find and select the new file to upload from your computer

- Click the "Save" button