

Digital Guide Checklist

Use this checklist to evaluate and update your digital guides, making them findable, followable, and scannable.

For Findable Guides

- ☐ Is the title phrased how a customer or employee would ask questions?
- ☐ Is the scope too big (i.e. Does the guide cover too many tasks)?
- ☐ Do you include additional search terms?

For Followable and Scannable Guides

- ☐ **Use headings and sub-headings to group main tasks**
Avoid long step-by-step lists. Instead, group steps into sub-tasks.
- ☐ **Use foldable sections wisely**
Use foldable sections to contain helpful information that can enhance understanding.
- ☐ **Have you separated out the foundational knowledge?**
Use foldable sections to contain helpful information that can enhance understanding.
- ☐ **Use bolding effectively**
Don't bold everything. Determine what you will bold in an article (i.e. important callouts or actions, like "click" or "start here").
- ☐ **Use styled paragraphs sparsely**
Be cautious about using too many stylized boxes, even if they are different colors.
- ☐ **Use action-oriented text**
Don't write a paragraph explaining how to handle a task. Instead, use a numbered list with bulleted instructions.
- ☐ **Use bulleted lists to break text apart**
Instead of separating lists with commas, use bullet points.
- ☐ **Use numbered lists to indicate a consecutive order**
If actions need to be taken in a specific order, don't use a bulleted list — use a numbered list.
- ☐ **Use decision trees when variables change what the procedure is**
If you are using if-then statements to describe a step, switch your article to a decision tree.
- ☐ **Find a good balance for screenshots**
Too few screenshots and the user can get lost, too many and it becomes overkill.
- ☐ **Use combination of text sizes when including text and screenshots**
If you are including screenshot instructions, combine headings with regular text and images.
- ☐ **Use screenshot annotations to make on-screen actions very clear**
Clearly use arrows, boxes, and numbers to point to the clicks and steps the reader needs to take.
- ☐ **Do NOT write paragraphs in your headings**
The purpose of the header is to break the document up. Headings should be short phrases. If you need more explanation, include a paragraph of text below.