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S T U D E N T A I D

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## **FSA Modernization Partner**

# Web Page GUI Guidelines/ FSA HTML Conversion Style Template

Version 1.0

Business-Technology Alignment  
Task Order #85

## Document Revision History

Version No.	Date	Author	Revisions Made
1.0	September 27, 2002	Bill Malyszka, BTA	This guide is to be used when formatting deliverable documents for conversion to HTML. It also includes descriptions of the formatting standards established by FSA along with other document formatting that will allow the resulting HTML to be consistent with the FSA Net look and feel.

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## 1 PURPOSE

The *HTML Conversion & Style Guide* document along with the accompanying example files serve to ease the effort involved in deploying documents to FSA Net. It is intended to be used by Federal Student Aid (FSA) Modernization Partners and others who will be delivering documents to FSA and will be publishing them on the FSA Net.

As FSA redesigns its intranet and continues to develop its portal presentations, the emphasis on a consistent look and feel delivered over the web increases. Consistency in formatting of content increases usability, enhances the user experience, and eases the management of content. This document describes how to best prepare deliverables for deployment to the FSA Net. It will touch on the steps involved from creating the document through handing the document off to an FSA Content Management Representative.

Specifically, this guide provides:

- Document formatting conventions
- Process for converting MS Word documents into HTML consistent with the look and feel of FSA Net web sites
- Frequently Asked Questions regarding the conversion and publishing of deliverable documents

This guide does *not* provide:

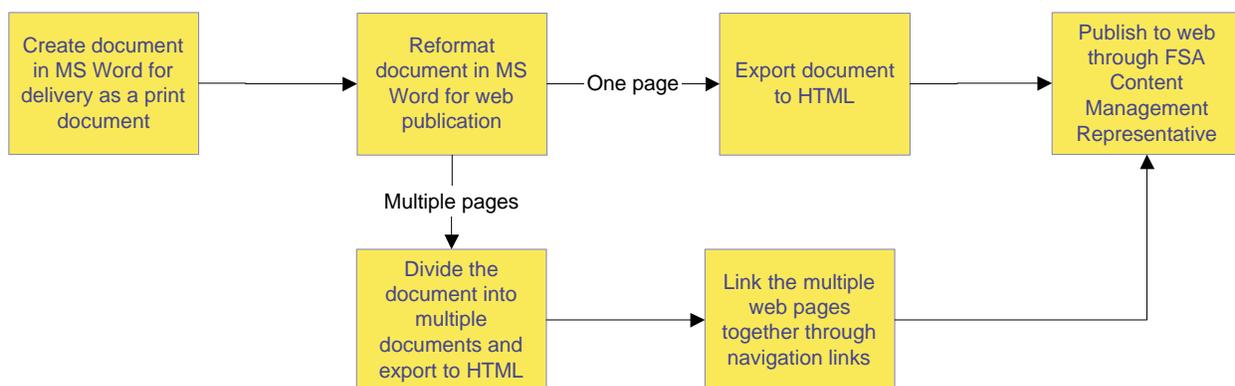
- Guidelines for developing the user interface for web applications
- An exhaustive specification of all formatting conventions for deliverable documents that will be converted to HTML. As FSA leaves much latitude for the document creators to employ formatting that best serves the intent of the document, there is no need to go beyond the small number of FSA prescribe style standards. It will be clearly noted when FSA standards are prescribed.
- Methods or procedures for publishing web content to a web server. In the case of FSA Net, this is the responsibility of the FSA Content Management Representative.

There may be project specific document standards that may need to be considered when preparing web documents. For example, ITA and CPS developers have web ‘look and feel’ guidelines. This document does not supercede these standards.

If this document does not provide all necessary information, please contact your FSA Content Management Representative.

## 2 HTML CONVERSION PROCESS

To publish a deliverable document to an FSA Net web site, the document must (1) be created in MS Word and prepared for delivery as a print document, (2) be reformatted for the web to include FSA standard formatting and other edits necessary for proper rendering of the document within a web browser, and (3) be provided to the FSA Content Management Representative. The process flow depicted below illustrates the steps in preparing a deliverable document for publication to a FSA Net web site.



### 2.1 Create document in MS Word for delivery as a print document

Using MS Word to create deliverable documents provides the ability to easily convert documents for publishing to FSA Net. When creating a deliverable document that will eventually be published on an FSA Net web site, there are some basic formatting standards that FSA has established in style guides referred to in *2.1.1 FSA Formatting Standards* of this guide. Otherwise, clean and consistent use of MS Word styles will greatly expedite the conversion of a deliverable print document to HTML.

#### 2.1.1 FSA Formatting Standards

There are only a few FSA style standards for the use of fonts and graphics in web pages. The following describes the text standards that are established in the *FSA Style Guide* produced by the FSA Communications office.

Print document body text (from <i>FSA Style Guide</i> )	<ul style="list-style-type: none"> <li>• ITC Giovanni</li> <li>• Times New Roman (alternate)</li> </ul>
Web document body text (from <i>FSA Web Style Guide</i> )	<ul style="list-style-type: none"> <li>• Verdana/Arial/Helvetica/sans serif</li> </ul>

Text in web graphic element (from <i>FSA Web Style Guide</i> )	<ul style="list-style-type: none"> <li>• ITC Giovanni</li> <li>• Times New Roman (alternate)</li> </ul>
FSA Graphics	<ul style="list-style-type: none"> <li>• Colors, size, and use of specific FSA graphics are prescribed in FSA style documents described below.</li> </ul>

This document is a sample of a deliverable document prepared for print. In the distribution of this file are folders containing samples of this document converted to one web page and also converted to multiple web pages.

There are no other FSA standard formatting specifications. So, font size and character attributes, such as bold, italics, and underline, are left to the discretion of the document’s author. FSA details its standards for the use of graphic elements and fonts within the following two FSA Communication publications.

- *FSA Style Guide* details the standard use of FSA, ED, and FAFSA graphics and color callouts when creating print publications, stationary, and other specialty items such as shirts, mugs, or hats
- *FSA Web Style Guide* details the standard use of FSA, ED, and FAFSA graphics on web pages. It also includes a color conversions chart.

### **2.1.2 Use of Styles in MS Word**

When creating a MS Word document deliverable that will be published on a FSA Net web site, using certain formatting conventions within MS Word will make the conversion very simple. When formatting a document, use the following techniques:

- Define a style for each header level, body text, bullet lists, table text and any other class of text paragraph that will be used within the document. For example, the *Normal* styles, which is used for body text, may be defined with Times New Roman as the font and 11 point as the text size. Styles will specify the font, paragraph, tab, paragraph numbering, and other formatting for an entire paragraph. Find the styles dialog by selecting *Style...* under the *Format* menu. It is not necessary to define all styles before creating the document, as styles can be added as needed during editing. Modifying a style will update all paragraphs to which the style has been applied to reflect the changes made.
- Apply a style to each paragraphs when creating the document. These styles will format the entire paragraph and will translate well to HTML paragraphs styles (e.g. an MS Word “Header 1” style will translate to an HTML <H1> style tag). Paragraph styles should be applied to text within tables or text boxes as well as the body and header text of the document.

- Apply character formatting only when the text to be formatted is a substring of a paragraph and not an entire paragraph. If character formatting is necessary for an entire paragraph, then a paragraph style should be applied or created. Character styles may include font size, bold, underline, italics, subscript or superscript among other formatting.

By employing these techniques, reformatting a deliverable document for publication on the FSA Net can be completed by modifying style definitions. There will be no need to reformat each individual paragraph within the document.

## **2.2 Reformat document in MS Word for web publication**

An MS Word document that will be published to the web will need to be reformatted to properly render in a web browser. To reformat a document for publication to a FSA Net web site in MS Word;

- View the document in *Web layout* mode. This option is found under the *View* menu. This editing view will approximate the look of the document in a web browser.
- Edit each paragraph style to reflect the FSA formatting standards. Currently, the only FSA formatting requirement for web pages is using Verdana, Arial, Helvetica, or a sans serif font as the text font.
- Review the document making sure that it is properly formatted and that the layout is as desired. Apply any final layout adjustments or manual formatting necessary.
- Preview the document in a web browser using the *Web Page Preview* option under the *File* menu.

Note that the FSA Net header and navigation bars will be added by the FSA Content Management team. They will insert the content provided to them into a template containing the FSA Net look and feel.

## **2.3 Export document to HTML**

If the document to be published to the web is short enough to load in a web browser over a modem connection in a reasonable amount of time, then publish it as one web page. This is typically a document that is under 10 pages long and includes a minimal number of graphic elements in its layout.

With a document that will be published as one web page, the process is as simple as saving the MS Word document as a Web Page. Specifically, within MS Word, do the following while in any editing mode:

- Selecting *Save As...* from the *File* menu.

- Give the document a name and select *Web Page* as the *File Type*.

The exported HTML file will be saved at the location specified in the *Save As...* dialog box. If the document contained graphics, they will be placed in a graphics folder at the same location with a name that is the same as the HTML page just saved.

If the MS Word document exported contained a table of contents with links to headers throughout the document, this will be saved as links to anchor points within the HTML document. This makes navigation easier for the users viewing the document.

## **2.4 Divide the document into multiple documents and export to HTML**

When a document is too large or contains too many graphics to be delivered on the web through one page, it is best to divide it into multiple documents to avoid inconveniencing users who rely on slow internet connections. When dividing a large document, use its logical chapter or section breaks as dividing points. Bear in mind that many graphics in a short document may also require one document to be divided into multiple documents because graphics can be bandwidth intensive and slow down loading in a web browser resulting in a poor user experience.

After the entire document has been reformatted for web publication, it can be divided by copying sections from the one large document and pasting the section into a new, blank document. Then save the document as HTML by:

- Selecting *Save As...* from the *File* menu.
- Give the document a name and select *Web Page* as the *File Type*.

The exported HTML file will be saved at the location specified in the *Save As...* dialog box. If the document contained graphics, they will be placed in a graphics folder at the same location with a name that is the same as the HTML page just saved.

## **2.5 Link the multiple web pages together through navigation links**

When multiple HTML documents are created by dividing an MS Word document, a mechanism for navigating between the HTML pages is necessary. This must be done manually by the document author and can be accomplished in several different ways. Consider the following when developing a navigation mechanism for your web pages:

- FSA Net does not deliver content through frames. Navigation between pages should not be dependent on the use of frames.
- A table of contents page that the document author creates is the most useful starting point for content that is delivered over multiple HTML pages. This can be created manually in any HTML editor.

- Pop-up windows can be used if the document is not intended to be read sequentially.
- *Next*, *Previous*, and *Top* links can be used if the document is to be read sequentially. The *Next* link would take the user to the next HTML page in the sequence of pages, while the *Previous* link would take the user to the previous page. The *Top* link would take the user to a table of contents page with links to all of the HTML pages.
- Use relative links when inserting the navigation links. These should work when the HTML documents are moved to a web server, whereas absolute links will most likely break and become inoperative.

When completed, test all links to make sure they take the user to the proper location. Once the web site is published, verify that the links continue to work.

## **2.6 Publish to web through FSA Content Management team**

The document creator does not publish content to the FSA Net. Rather, the content is transferred to a FSA Content Management Representative who manages the publishing of the content. The FSA Content Management team is responsible for inserting the content into a template which contains the FSA Net header and side navigation bars which are found on all FSA Net web pages. The content is then staged for deployment through the Interwoven tool.

## **3 UPDATING WEB CONTENT**

Once content has been published to a FSA Net web site, it can be updated by transferring the new content to the FSA Content Management Representative. The process is the same as publishing new content otherwise.

## **4 FREQUENTLY ASKED QUESTIONS**

### **4.1 What happens if other HTML editors are used such as MS Frontpage or Macromedia Dreamweaver?**

Because MS Word uses specialized style conventions within the HTML pages that it exports, it is difficult to edit the content in another HTML editor without running into complications. When editing in MS Frontpage, Frontpage will open the document in a MS Word editing window, so the MS Word specific style markup is handled well.

Macromedia Dreamweaver has a *Clean Up Word HTML* command which strips out the specialized MS Word style markup tags. When using this, there are occasions when text will also

be inadvertently deleted along with the style tags. Be certain to proofread any document after executing this command.

## **4.2 What else can this guide be used for?**

This guide serves two purposes. First, it provides a process for formatting content that will be deployed on the FSA Net through the FSA Content Management team. It includes the FSA formatting conventions. Second, this guide is a generic reference for converting an MS Word document into HTML for deployment on any web server, so It can be used for preparing documents for delivery in situations other than on FSA Net.

## **4.3 How do I add links within an MS Word document?**

There are two types of links that can be added to an MS Word document that will be converted to HTML—internal and external. Internal links are hyperlinks that take the user to another location in the same document. These are added to a document by selecting *Cross Reference...* under the *Insert* menu. Then select a heading, a bookmark, a table, or another other location in the document that the reference is linked to. Make sure the *Insert as hyperlink* checkbox is checked. This will become an HTML hyperlink when saving the document as a web page.

An external link will take the user to another document somewhere on the internet or the local network. To insert an external link, highlight the text or graphic that will serve as the link and select *Hyperlink* from the *Insert* menu. Select the document that will be the destination of the linked text. An email link can also be added using the same menu command. The email link will open the default mail client and create a new message addressed to the person specified in the link.