INCOSE Style Guide
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Contents

1. Introduction

This document advises authors who wish to write content for any INCOSE publication on how to prepare their manuscripts and how to write to reduce the need for editing. This document goes together with the Microsoft (MS) Word template (2020 INCOSE Template.dotx) and the document "2020 INCOSE Citation Quick Guide."

The basis for the "house style" of INCOSE is *The Chicago Manual of Style*, 16th edition (Chicago, US-IL: University of Chicago Press, 2010). This manual is also available online for subscribers at http://www.chicagomanualofstyle.org (many university and public libraries subscribe and offer access through their websites). To meet the needs of an international systems engineering forum, the INCOSE editorial staff follows certain alternative rules allowed in the *Chicago Manual of Style* (henceforth, CMOS), and has also created rules specific to INCOSE's needs.

Below are the explanations of rules necessary for authors to know *for INCOSE* submission; additional edits can occur during the editing process. During the review stage, authors should not be surprised to see minor changes made to their text (no matter how well written); these are by design to maintain consistency with INCOSE's house style.

2. Editorial Process for INCOSE Communications

No matter how many committee reviews or peer consultations a paper has passed through before being submitted to an INCOSE publication, the paper will still receive a thorough editing from *INCOSE* staff in several stages as described below. Since this publication follows a particular style standard, modified according to "house style" rules, every document will need some tweaking to conform to the standard. Beyond this, an article written for one audience (say, an academic conference or working-group meeting) will need

to be adapted for audience of all INCOSE readers. Our editing is not about right and wrong, or good and bad writing; our goals are merely to help authors communicate with consistency, clarity, and ease of understanding to a broad, diverse, international audience of some 18,000 members. We aim to treat authors with respect and hope that our suggestions receive the same treatment.

The editorial staff for *INCOSE* includes editors selected from various organizations and initiatives in INCOSE.

For any article submissions, submit articles directly as described from the parties sharing this Style Guide. If in doubt, please send to insight@incose.net. The party using the Style Guide is the party who is responsible for communication with the author.

The article receives a house edit and may or may not be sent back to the author for review (this depends on the editing); if major content edits need to be done, then the article is returned to the author. The editors edit electronically via the Reviewing tool in MS Word. The edits at this stage may range from basic application of the house style (for example, MS Word formatting, inserting serial commas, adding or removing hyphens or capitalization) to more substantive suggestions for revising the content of the article. The editorial staff asks that in their review, authors not concern themselves with the "small stuff" (hyphens, capitalization), but with responding to the queries and larger suggestions from the editors.

The author then resubmits the article to the editor-in-chief, who reviews the author's changes. Any further rounds of editing at this point (a rare occurrence) occur as needed. The author will not have another opportunity to see the article until publication, unless a problem arises in the proofreading stage requiring the author's input.

The editor-in-chief for the party using these guides then sends the article to a Layout Editor, who lays out the entire issue of INCOSE in a draft PDF format. The assistant editor then edits these proofs, and the editor-in-chief reviews these edits. The edits at this stage are usually limited to correcting minor errors (most often, missing commas and hyphens).

The layout editor then incorporates the changes and finalizes the layout. The final product is then published, in its online versions by INCOSE and others as applicable in PDF (and occasionally other) formats, and then in paper format, and the paper copies of *INCOSE Products* are mailed to subscribers.

3. Manuscript-Preparation Requirements for Authors

a. Where to Submit
- Unless otherwise specified, articles of a general nature should be sent via e-mail to Marketing and Communications at insight@incose.net.
- Proposals for articles that are part of a special theme publication should be sent to the relevant theme editor before the date given by that editor. The theme editor(s) submit themed articles directly to the INSIGHT editor-in-chief at insight@incose.net.

b. File Type and Name
- The file should be in Microsoft Word format (saved in the preferred.docx format rather than .doc).
- For independent article submissions (not part of a theme publication), the file name should consist of first author's surname (family name) and the first two or three words of the title. Separate all words with hyphens.
  - Example: "Systems Challenges for a New Century" by C. Robert Kenley and Andrew Cashner would be saved as 'Kenley-Systems-Challenges.docx.'
- For theme-specific articles (such as for Empowering Women as Leaders in Systems Engineering (EWLSE), add "TS-EWLSE" before the file name.

o Example: TS-EWLSE-Kenley-Systems-Challenges.docx

c. MS Word Formatting

- To streamline the editing process (and reduce the cost to INCOSE), make your document as simple as possible, electronically speaking. That is, please do not use special fields for figures or citations, fancy tab stops, multiple fonts, hyperlinks, columns, paragraph spacing, or other such features, since the editors will have to remove them all anyway. If you have special formatting requests, please communicate them to the editor-in-chief of your initiative so that they can pass them on to MarCom who oversees the formatting after the documents have been edited.

- *Instructions for Basic MS Word User*
  o Font: Times New Roman for all text, except for website addresses (uniform resource locators or URLs), where font is Arial Narrow
  o Size: 12 point throughout, including URLs
  o Spacing: Single (no added paragraph spacing)
  o Justification: Left (including headings and captions)
  o Margins: 1 inch on every side (yes, we use U.S. inches)
  o Style: You may use bold for main headings and italics for subheadings and captions (and sparingly for emphasis in the text)
  o Lists: Use Word's automatic bullet- or numbered-list tool to make any lists
  o Tabs: Use a single tab to indent the beginning of paragraphs
  o Space between sentences: Use a single character space between sentences

- *Instructions for More Advanced MS Word User*
  o Open the template file INCOSE.dotx, save the file as a .docx file with the correct file name, and then use the following pre-defined styles as indicated:
    - **Normal** (Use for main body text, and when in doubt)
    - **Heading 1** (Use for main title and subject headings)
    - **Heading 2** (Use for headings of subsections)
    - **Caption** (Use for captions of figures and tables)
    - **URL** (Use for e-mail and web addresses)
    - **Biblio** (Use for reference list)

- *Instructions for Virtuoso MS Word User*
  o Define and apply the following styles (or use the styles in the template (2014 INCOSE Template.dotx).
    - **Normal** (Use for main body text, and when in doubt)
      Style type: Paragraph; Style for following paragraph: Normal; Font: Times New Roman; Font Size: 12; Font Style: Normal; Margins: 1 inch on all sides; Spacing: Single; Indent: First line .5 inches; Language: English (UK or US)
    - **Heading 1** (Use for main title and subject headings)
      Style type: Paragraph; Based on Normal; Style for following paragraph: Normal; Font Style: Bold; Indent: None
    - **Heading 2** (Use for headings of subsections)
      Style type: Paragraph; Based on Normal; Style for following paragraph: Normal; Font Style: Bold + Italic; Indent: None

- **Caption** (Use for captions of figures and tables)
  Style type: Paragraph; Based on Normal; Style for following paragraph: Normal; Font Style: Italic; Indent: None
- **URL** (Use for e-mail and web addresses)
  Style type: Character; Based on Default Paragraph Font; Font: Arial Narrow
- **Biblio** (Use for reference list)
  Style type: Paragraph; Based on **Normal**; Style for following paragraph: Normal; Indent: Hanging .5 inches (no first-line indent)

d. Length of Articles
Please estimate 580 words per published page in an INCOSE publication.

e. Title and Affiliation
Each article title shall remain in its original language. We will not translate article titles from French to American English, as an example.

After the article title, give the primary author's or authors' name and e-mail address. Please only list contributors at the end of the article. Please see information on this under section *j. Biography*. Please do not include academic titles, degrees, or professional affiliations, here, these belong in the biography that goes at the end of the article – see section *j.* below.

INCOSE aims to provide an open forum for all INCOSE members as equals, and therefore we prefer to keep authors' academic or professional status in the background. If your title or affiliation is specifically relevant to your article (for example, you work for Lockheed and your article is about systems engineering at Lockheed, or you are a CSEP and your article is about INCOSE certification), please discuss this with the editor-in-chief of your initiative.

f. Abstracts
INCOSE requires an abstract if the publication you are writing is a practitioner or research article. INCOSE publishes the abstract in the INCOSE store and elsewhere along with a pdf file of the article. The abstract will be freely available to all who visit the INCOSE store, on social media to advertise the article, etc.

Your introductory and concluding paragraphs need not summarize the entire content of the article in detail (unless you are writing specifically for the *Systems Engineering Journal*). Focus on providing an introduction that draws in the reader (more like a magazine article) and a conclusion that reminds the reader what is most important about what you have said and perhaps suggests avenues for further exploration. Please plan on ~250 words for the abstract.

g. Figures and Tables
Immediately follow the first reference to a figure or table with the actual figure or table, and number each respective figure or table sequentially (do not use automatic numbering or special fields). Format the images to be "in line with text" and flush with the left margin. Be prepared to make changes to text in figures and tables after the first editing review. Format captions for both figures and tables as follows:
- *Figure 1. Proper format of captions*
- *Table 1. Proper format of captions*

Note: there is no punctuation at the end of a caption.
The layout editor will format tables to the INCOSE standard.

Include separate files for figures in Excel (.xls), PowerPoint (.ppt), Tagged Image File (.tif), Macintosh PICT (.pct), Encapsulated PostScript (.eps), Adobe Acrobat (.pdf), and Joint Photographic Experts Group (.jpg) formats. Photos need a resolution of at least 288 pixels per inch whenever possible.

h. Book Reviews

For a book review, include the book title, subtitle, author's name, place of publication, publisher, date, and ISBN number, as well as the reviewer's name and e-mail address. Optionally, you may also include a title for the review above the book title.

- **Mind over Matter?**

The Emotion Machine: Commonsense Thinking, Artificial Intelligence, and the Future of the Human Mind
By Marvin Minsky
New York, US-NY: Simon & Schuster, 2006 (ISBN-13: 978-0743276634)

Reviewed by Andrew Cashner, andrew.cashner@incose.net

i. Op-Eds

According to the Merriam-Webster online dictionary (accessed 6th June, 2016), an op-ed (originally short for "opposite the editorial page" though sometimes interpreted as "opinion editorial") is a written prose piece typically published by a newspaper or magazine which expresses the opinion of a named author usually not affiliated with the publication editorial board. Op-eds are different from both editorials (opinion pieces submitted by editorial board members) and letters to the editor (opinion pieces submitted by readers). An opinion editorial for INCOSE purposes is an invited editorial that is a feature that will appear on an invited basis in an INCOSE publication These Op Ed pieces will be written by someone who is neither the journal's editor in chief nor a member of its editorial board, that comment on the particular theme, or a specific article. The title Opinion Editorial is used, and the editor's chosen title and name appears as they do in all other articles. At the beginning of the article, it must be clearly stated that these are the views of the author, and do not reflect INCOSE views.

j. Biography

The biography is a brief note on the author or authors (250 words or less). This note includes current position, title, major publications, current and previous work in INCOSE and similar organizations, and academic/industry affiliations. The note appears at the end of the article.

A list of contributors is appropriate to include at the end of an INCOSE article for a work by many authors in which only the primary author or volume editor's name appears on the title page. The list (usually headed Contributors) has names arranged alphabetically by last name but not inverted ("Koren D. Writer," not "Writer, Koren D."). Brief biographical notes and academic affiliations may accompany the names.

See Figure 1 for sample biographies for authors and/or contributors.

CONTRIBUTORS

MARK ANTLIFF is associate professor of art history at Duke University. He is the author of *Inventing Bergson: Cultural Politics and the Parisian Avant-Garde* (1993); coeditor, with Matthew Affron, of *Fascist Visions: Art and Ideology in France and Italy* (1997); and coauthor, with Patricia Leighten, of *Cubism and Culture* (2001). He is currently completing two books: a coedited collection of primary documents titled *A Cubism Reader, 1906–1914* (with Patricia Leighten) and *The Advent of Fascism: Art, Myth, and Ideology in France.*

NINA ATHANASSOGLOU-KALLMYER is professor of modern European art at the University of Delaware and the author of *French Images from the Greek War of Independence, 1821–1830: Art and Politics under the Restoration* and *Eugène Delacroix: Prints, Politics, and Satire.* She edited the special issue of the *Art Journal* on Romanticism and has published articles on nineteenth-century French art and culture. Her most recent book, *Cézanne and Provence: The Painter in His Culture,* is forthcoming from the University of Chicago Press. She is currently working on a project involving Victor Hugo and his circle.

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SUZANNE PRESTON BLIER is the Allen Whitehill Clowes Professor of Fine Arts and professor of Afro-American Studies at Harvard University. She is the author most recently of *African Vodun: Art, Psychology, and Power*; *The Anatomy of Architecture: Ontology and Metaphor in Batammaliba Architectural Expression*; *The Royal Arts of Africa: The Majesty of Form*; and *Imaging African Amazons: The Art of Dahomey Women Warriors* (forthcoming). She is also completing a book on art, conflict, and diplomacy in ancient Ife (Nigeria).

FIGURE 1.10. Partial list of contributors to an edited collection. See 1.62.

Figure 1. Sample biographies

4. Citation Requirements for Authors

Authors are responsible for providing full citations for all material used from other sources, especially direct quotations and reproduced figures. Authors must include all necessary bibliographic information for these references.

If you have only one or two citations, you may include them parenthetically in the text:

One excellent book on the topic is Mark Maier and Eberhardt Rechtin's *The Art of Systems Architecting* (Boca Raton, US-FL: CRC Press, 1997).

All articles with more than two citations must use the *CMOS* author-date citation format with a reference list. Other formats, such as footnotes, endnotes, numeric references to

a numbered bibliography, or citation systems from other style manuals, are not acceptable. Authors of articles using such systems must change them to the proper format *before* submitting the article to INCOSE.

The *CMOS* author-date system is simple. All citations go into an alphabetized reference list at the end of the article. Each entry must include the following information: Initials and surname of all authors, date, full title and subtitle, place of publication, publisher, plus other information as needed, such as URLs, journal volume and issue numbers, or a description of the item.

The organization of the reference list is alphabetical by the first author's surname (family name). Initials are given for the first or middle names of all authors. The first author's name is inverted, but the other names appear in normal order. For an article with eleven or more authors, list only the first seven, followed by "et al." Otherwise, list all authors. Use three em-dashes to substitute for an author's name if it is repeated.

All titles are capitalized headline-style. Book titles are set in italics. Titles of articles, conference papers, theses, and working papers are set in roman (non-italic) type and enclosed in quotation marks.

We modified the style requirements of our general editorial standard, *CMOS*, 16th edition, to include the two-letter abbreviations for nations and subdivisions specified in the standard ISO 3166-2. According to ISO 3166-2, a two-letter abbreviation for the nation-state is used, followed if necessary, by a hyphen and an additional two-letter abbreviation for the subdivision (such as a US state or Canadian province). These abbreviations are on the Wikipedia entry for "ISO 3166-2"; in the table of country codes there, clicking on the code of a particular country will lead to another page listing that country's subdivisions.

In the publishing location listed in a bibliographic citation, we write *Los Angeles, US-CA*. A publishing house in Vancouver, British Columbia, Canada, is listed as *Vancouver, CA-BC*.

Notably and perhaps controversially, ISO 3166-2 uses *GB* for Great Britain rather than *UK*. For consistency, we will follow this standard in bibliographic citations; but we will continue our older and much more commonplace practice of using *UK* in running text. So a book published by Oxford University Press will be listed in the reference list as being in *Oxford, GB*, but an announcement of a conference to be held at Oxford University will read *Oxford (UK),* and we will still speak of the *UK Ministry of Defence;* similarly an announcement of a conference to be held at University of California, Los Angeles will read *Los Angeles, US-CA*

For examples of many types of citations, see the separate document, "INCOSE Citation Quick Guide."

5. Style Guidelines for Authors

a. General Notes

INCOSE has an international audience of systems engineering practitioners of many different kinds and specialties, and with differing levels of experience. Many readers are non-native speakers of English, and even the English-speaking readers come from distinct regions of English, such as the United States, Great Britain, South Africa, and Australia. Please write in such a way that your writing will be accessible to as many of these readers as possible. In keeping with this goal, we encourage the use of internationally neutral terminology, gender-neutral language, and mainstream English usage for formal writing, and **we seek to avoid such obstacles to broad comprehension as unnecessary use of abbreviations, the overuse of the passive voice, nominalization, and other forms of obscure writing.**

We recommend the following sources as guides to clear and effective writing.

Garner, Bryan A. 2010. "Grammar and Usage." In *The Chicago Manual of Style*, 16th ed., 201–304. Chicago, US-IL: University of Chicago Press.

Merriam-Webster's Collegiate Dictionary. 11th ed. Springfield, US-MA: Merriam-Webster. Also available at http://www.merriam-webster.com/.

Strunk, William, Jr., and E. B. White. 1979. *The Elements of Style*. 3rd ed. New York, US-NY: Macmillan.

Orwell, George. "Politics and the English Language." In *The Orwell Reader*, edited by Richard Halworth Rovere, pages 283-299. New York, US-NY: Harvest Books (Harcourt Brace), 1961. Also available many places online.

b. Regional Differences

We have tried to strike a balance between being inclusive of regional differences in English style and usage, and being consistent enough to be clear to all readers. Authors may use either standard British or English spelling and usage in most cases, as long as it is consistent within a particular article. In certain matters of punctuation (for example, Mr vs. Mr., punctuation inside or outside quotation marks) and in cases where words have different regional meanings (this occurs only rarely, and usually in colloquial expressions), United States usage will prevail, in keeping with our US-based style guide and editorial staff. We recommend that authors write exactly as they prefer and allow the editors to resolve regional style issues.

Global Regions. We use the United Nations Statistics Division Standard Country and Area Codes Classifications for the names of global regions listed at http://unstats.un.org/unsd/methods/m49/m49regin.htm. Note that the United Nations nomenclature uses the term Western Asia instead of the more commonly used Middle East, which was coined by a British military officer in 1900 according to Clayton R. Koppes' article "Captain Mahan, General Gordon, and the Origins of the Term 'Middle East'" published in *Middle Eastern Studies* in January 1976. Two-letter abbreviations used for countries are determined by ISO and listed at http://www.iso.org/iso/country_codes/iso_3166_code_lists/country_names_and_code_elements.htm.

United States. There is no completely satisfactory solution for referring to the United States of America in an internationally neutral way, short of the obviously cumbersome option of spelling out the full name every time. We will follow the *CMOS* recommendation to use "United States" in running text and "US" as an abbreviation (with no periods; the same is true for "UK"). We include "US" after the two-letter names of US states: for example, "Cambridge, US-MA in running text."

Currency. We follow the ISO 4217 standard for three-letter currency abbreviations, so that three thousand United States dollars would be given as "USD 3,000." Three-letter abbreviations used for currency are determined by ISO and listed at http://www.iso.org/iso/support/faqs/faqs_widely_used_standards/widely_used_standards_other/currency_codes/currency_codes_list-1.htm.

Measurements and Dates. We use SI units for all measurements, and we use the day-month-year format for dates (for example, 12 April 1981).

Numbers. We follow the CMOS guidelines for writing in scientific or journalistic contexts, to spell out only numbers one through nine and to use numerals for all others.

We do ask that authors maintain an international perspective on their writing. For example, please do not use "American" to mean "citizen of the United States," or refer to the "DoD" without first specifying "the US Department of Defense."

c. Abbreviations and Jargon

In keeping with the goal of making INCOSE accessible to as many readers as possible, please keep your use of abbreviations and specialized terminology to a minimum. **Most importantly, we always write out the phrase *systems engineering* rather than use the abbreviation SE (if you have used the abbreviation in your article, a simple find-and-replace in MS Word can solve the problem before you submit).** Always fully spell out a term before abbreviating it the first time, and consider whether you will be using the term often enough to warrant using the abbreviation (three times or less is probably not enough). However, if you are using the abbreviation throughout the article, you may use the acronym in the headline of the article and spell it out the first time mentioned in the article.

We do not use i.e., e.g., or etc.

When referencing the abbreviation for an event or conference, for example GLRC 2018, please put a space between the event abbreviation and the year.

d. Capitalization

CMOS recommends a "down" style of capitalization— "the parsimonious use of capitals"—in which only proper names are capitalized. Thus, terms like *president, chair, director*, and the like are lowercase unless they form part of someone's name (for example, "We invited President Harding to the meeting," but "The president of INCOSE came to the meeting"). Academic subjects, engineering sub disciplines, and buzzwords remain lowercase. You need not master Chicago's method of capitalization, but be prepared to see plenty of words lowercased that you often see elsewhere in capitals. When mentioning officials in a vertical list, the titles may be capitalized. Use a colon to separate the name and title, for example, President: John Smith.

e. Completeness

Please write in complete sentences and paragraphs with the necessary topic and transition sentences. Please do not submit unedited e-mail correspondence, meeting notes, multiple pages of cryptic bullet points, and other incomplete material. We reserve the right to ask you to rewrite or reorganize an article if it is not complete.

f. Passive Voice and Nominalization

Use the active voice whenever you can, and do not turn everything into a noun. With regard to passive voice, writing "The researchers tested the device to see if it fulfilled the stakeholder's requirements" sounds stronger and more dynamic (and easier for non-native speakers to read) than "The device was tested to ensure that stakeholder requirements were fulfilled." The second sentence is also less clear: who tested the device, and exactly how were the requirements fulfilled?

Regarding nominalization, writing "We are beginning a program that will identify what the consumers need" sounds more interesting and inviting to the general reader than "Initialization of a consumer need identification program is taking place." Long noun strings like the one in the previous sentence can be especially confusing and cumbersome. They are very often unclear: is it a "malfunctioning computer-repair system" (the system for repairing computers doesn't work) or a "malfunctioning-computer repair system" (the system repairs computers that don't work)?

If you use passive voice and nominalizations extensively, expect to see lots of red ink on your article as the editors try clarifying what you are saying.

g. Intellectual Property and Permissions
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- Follow the online instructions and select your requirements from the drop-down options and click on 'quick price' to get a quote
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6. Guidelines for Theme Editors
The theme editor is responsible for recruiting authors and acquiring articles from them by the submission deadline agreed to for the INCOSE intiative. The theme editor is responsible for making sure that all articles follow the proper format, have proper file names, **and have complete and correctly formatted reference lists and in-text citations.**