TSO
information & publishing solutions

IA Template User Manual

Introduction

The Impact Assessment (IA) Template has been designed to simplify the publishing process by helping users to produce a document that resembles a published and printed IA. The template uses standard MS Word functionality with which most users are familiar.

This version of the manual applies to IA Template from release 3.2.0 onwards. Please see "IA template version", page 17, for information on template releases.

IA Template Support

Should you require specific guidance on the use of the template for your document that is not covered by the user guide or FAQs, please contact the SI Support Desk by email:

- iasupport@tso.gse.gov.uk – if you are an gsi or x.gsi email user
- iasupport@tso.co.uk – other email users

Please ensure that the subject line of your email makes clear that the query relates to the IA template.

Communications from open email networks (non gsi or x.gsi) are not secure. These should not be used to send Protectively marked documents.

Keyboard conventions

Keys are referred to throughout the manual in the following way:

Enter – denotes the Return or Enter key; Delete – denotes the Delete key, and so on.

Command button conventions

Toolbar buttons are shown as they appear on the toolbar, e.g.:

Update

Notes

Within each section, any items that need further explanation or extra attention are emphasised by shading. For example:

Note: Word will prompt you to save changes if you attempt to close an amended document without having saved.

The panel will be prefixed with the word "**Note**".

What are templates?

Every Microsoft Word document is based on a template. A template determines the basic structure for a document and contains document settings such as autotext entries, fonts, key assignments, macros, menus, page layout, special formatting and styles. Each document records which template it has been based on and the location of the template (where the template is saved). To ensure that you encounter few problems on opening and saving files, please refer to the best-practice procedure at the end of this section.

Overview of the IA Template

The IA template has been designed to assist you in drafting new impact assessment documents in the correct format. Instead of having to know all the font sizes, types of font, whether they are centred or not, or how much space to leave after elements, the template will insert or format these elements for you. This is done by using styles in Word. Styles are the main feature, and all IA elements, like the title, will have their own unique style.

The IA Template process

The IA template is the front-end of a production process that enables simultaneous production of both print and electronic formats of an IA.

The design, functionality and correct usage of the template are all essential factors in the success of the production process. The template's styles and elements are designed not only to look correct on the page, but also to enable each individual element to be extracted and tagged correctly for XML, HTML and SGML output.

Automated validation and conversion processes – based on this template - will be used within the IA workflow in the near future. Incorrect use of the template, or changes to template styles, will cause errors in this workflow. These errors will need to be rectified manually which could prevent the simultaneous publication of the print and electronic versions.

> ***Note:*** *Modifications to the template may delay the publication of your document.*

IA Template Best Practice

This section provides guidelines for looking after the template, moving it, and sharing it with other users.

Locations to save the IA Template

To ensure portalbility, you will need to install the template in the default MS Word templates directory (folder). In an office environment, all PCs will usually be setup the same way. If some users do not save the template in the default template folder, then the template will not automatically attach.

Template changes

Do not make any changes to the IA template or alter autotext entries. This will ensure that all validation functions and styles are retained within the document. By default the properties of the template are set to read-only.

Due to Word functionality, you may receive unexpected prompts to save changes. In general, if you are prompted to save a change to a template, always respond "No". The wording may be "Do you want to save the changes you made to IA.dot" or "Do you wish to save changes to the document template?".

> **Note**: *If prompted to save changes to a <u>template</u>, always select "No"*

When closing your document, you may receive a message asking you if you want to save your changes, even if you have just saved them. This is because the closing action may update some internal settings after you have saved your work. In general, always respond "Yes" unless you have made changes that definitely must be discarded rather than saved.

> **Note**: *If prompted to save changes to a <u>document</u>, always select "Yes"*

Naming conventions

Do not rename the template; keep it as "IA.dot". If the template is renamed, then this will compromise portability.
Template and publication functionality have to differentiate between this version and previous version of the template.

New versions

Always check that you are working on the latest version of the IA template.
On the IA menu "Help" item, the precise version of the template can be viewed.
The IA template download website will confirm the latest template release.

Installing the IA Template in your Templates folder

Word 2003 method

1. Browse, using Windows Explorer or My Computer, to download folder where the IA template is located.
2. Select the template file (single click)
3. Select Right-click, Edit | Copy or press Ctrl+C. to copy the template
4. Start MS Word
5. select File | New.
6. A "New document" pane will appear. Click "On my computer" under the Templates heading.)
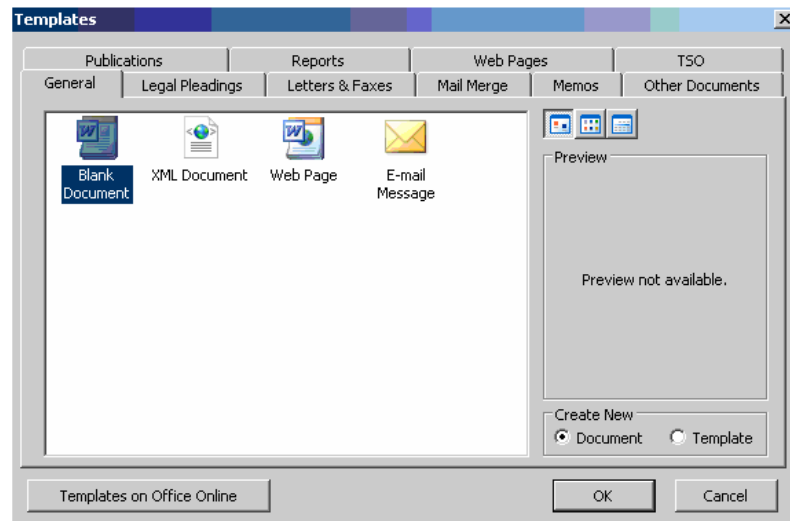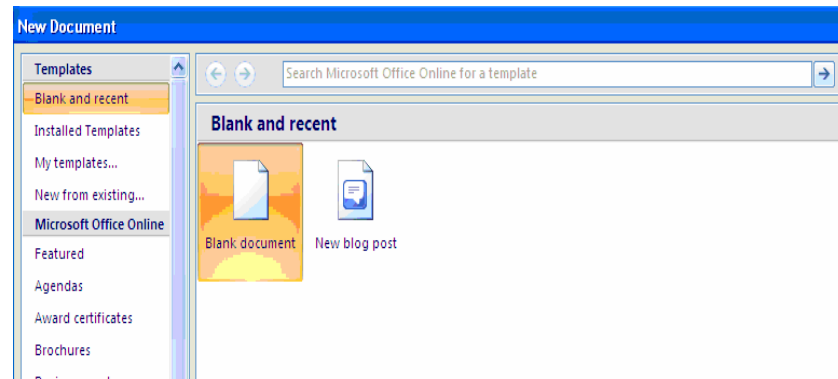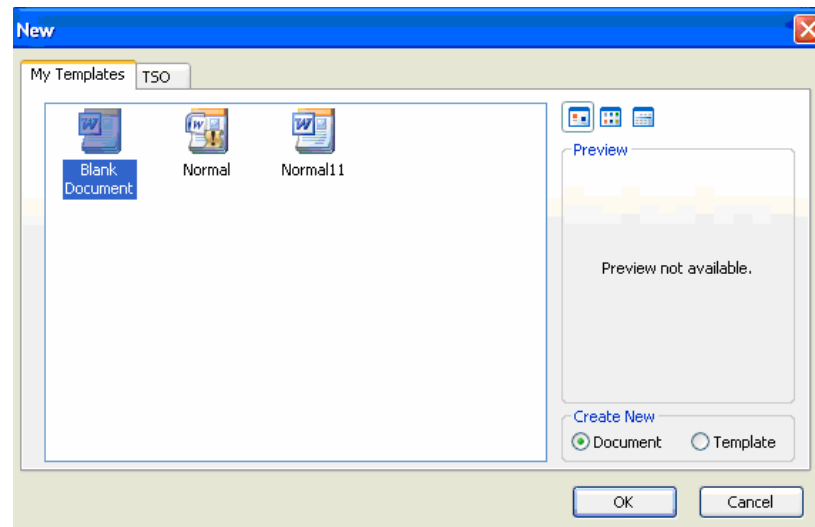
7. Right click within the General window area and choose Paste, or Ctrl+V.
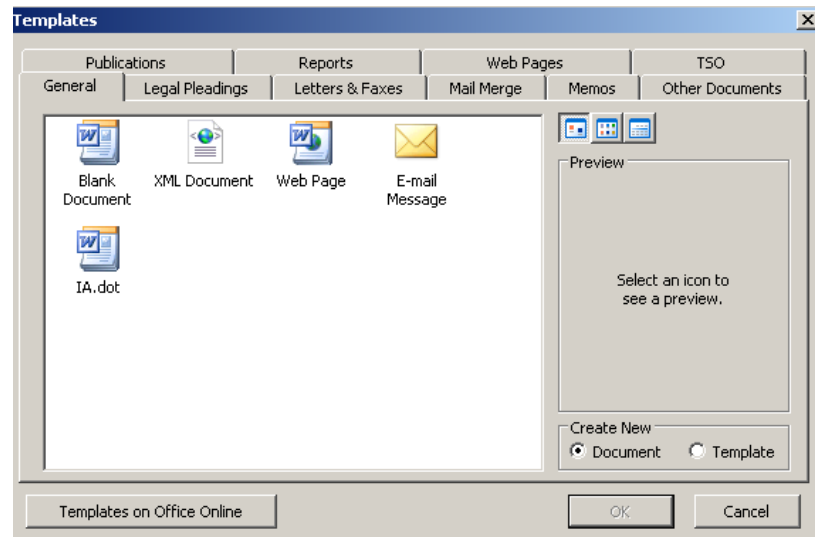
Word 2007 method

1. Browse, using Windows Explorer or My Computer, to download folder where the IA template is located.
2. Select the template file (single click)
3. Select Right-click, Edit | Copy or press Ctrl+C to copy the template
4. Start MS Word
5. select "New" from the Office button. The dialgue below appears.

6. Select "My templates"

7. Right click within the General window area and choose Paste, or Ctrl+V.

8
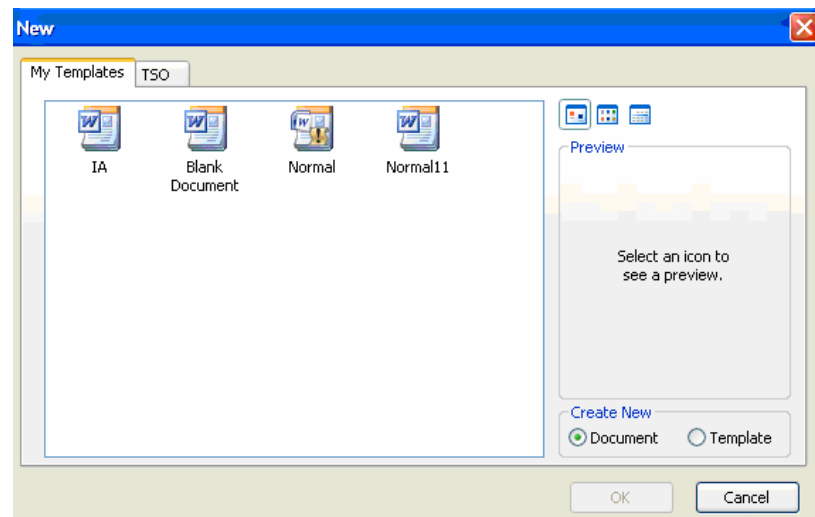
Creating a new IA document based on the IA Template

If your IA Template was saved in the default '*Templates*' folder, you will be able to access it by using the following method:

☞ To create a new IA based on the IA Template

Word 2003

1. Select File | New
2. Choose "On my computer" from the new document pane
3. Select the IA template IA.dot
4. Choose OK

Word 2007

5. Select New from the Office button
6. Choose "My templates"
7. Select the IA template IA.dot
8. Choose OK

Attaching the IA template

When you create a new document based on the IA template, the document is associated with the IA template. If the default template folder is not used, then the IA document will not be portable between users.

An indicator that the default template folder has not been used is absence of toolbars: these are in the template, not the document.

> ***Note:*** *If the IA toolbar is not visible, then the template is not attached!*

The IA template IA.dot cannot be attached to IA documents created by earlier versions of the IA template. If such a document needs to be edited using the template, then the text must be pasted into a new document created using IA.dot.

The IA template user interface

When a User chooses to create a new IA document from the IA template using the IA template the following dialog box will appear:
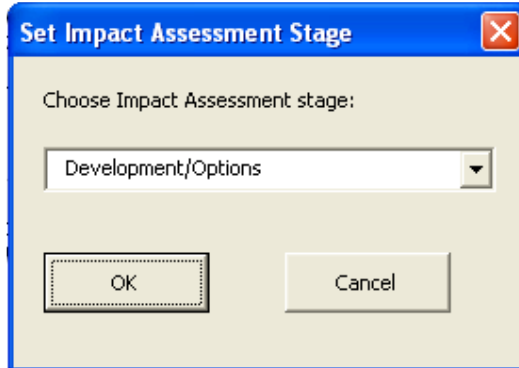
Select the stage from the drop down menu and click OK. The options are:

- Development/Options
- Consultation
- Final
- Enactment.
- PIR

The document will come to the foreground with the selected stage displayed in the field at the top right of the first page and customised toolbars providing access to features of the template will load under the Word toolbars displayed below the main Word menu.

Document3 - Microsoft Word

File   Edit   View   Insert   Format   Tools   Table   MathType   Window   Help

Add/Remove Policy Options ▾ | Insert/Delete Signature ▾ | Set Security Classification | Set IA Stage | Paste Without Format

EBHeading1 Style | EBHeading2 Style | EBHeading3 Style | EBHeading4 Style | EBBodyPara Style | EBBullet Style | EBNumber Style

Tracking Changes is Off | Accept or Reject Changes

Title:	Impact Assessment (IA)
IA No:	Date: 01/01/2011
Lead department or agency:	Stage: Development/Options
	Source of intervention: Domestic
Other departments or agencies:	Type of measure: Primary legislation
	Contact for enquiries:
Summary: Intervention and Options	**RPC:** RPC Opinion Status

Cost of Preferred (or more likely) Option

Total Net Present Value	Business Net Present Value	Net cost to business per year (EANCB on 2009 prices)	In scope of One-In, One-Out?	Measure qualifies as
£m	£m	£m	Yes/No	In/Out/zero net cost

What is the problem under consideration? Why is government intervention necessary?
Maximum of 7 lines

In Word 2007, Click the *Add-Ins* tab and customised toolbars providing access to features of the template will display in the menu ribbon.

Document2 [Compatibility Mode] - Microsoft Word   Table Tools

Home   Insert   Page Layout   References   Mailings   Review   View   Add-Ins   Design   Layout

Tracking Changes is Off   Accept or Reject Changes

Add/Remove Policy Options ▾   Insert/Delete Signature ▾   Set Security Classification   Set IA Stage   Paste Without Format

EBHeading1 Style   EBHeading2 Style   EBHeading3 Style   EBHeading4 Style   EBBodyPara Style   EBBullet Style   EBNumber Style

Custom Toolbars

Double-click to hide white space

Title:	Impact Assessment (IA)
IA No:	Date: 01/01/2011
Lead department or agency:	Stage: Development/Options
	Source of intervention: Domestic
Other departments or agencies:	Type of measure: Primary legislation
	Contact for enquiries:
Summary: Intervention and Options	**RPC:** RPC Opinion Status

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What is the problem under consideration? Why is government intervention necessary?
Maximum of 7 lines

Using the template

This template has been designed with a combination of form fields and tables in the *Summary* sections (including the *Policy Options*) and form fields, free text areas in the *Evidence Base*.

We **strongly recommend** that you navigate in the *Summary* sections using the **tab key** to advance to the next field and the **shift + tab keys** to return to the previous field to ensure that the placeholder is entirely selected before entering any text.

A quirk in the way that Word works with form fields in tables means that precisely selecting text strings in some parts of the template is impossible. When the document is protected, you can place the cursor at any point in a form field with a single click, double clicking will select the word and treble clicking will select the entire field content. Double clicking the first or last word in a field will also select the entire contents of the field.

Text selection in the *Evidence Base* and additional *Annexes* works normally.

Customised Toolbars

The following features are available from the customised toolbars in Word 2003 or from the *Add-Ins* tab in Word 2007:
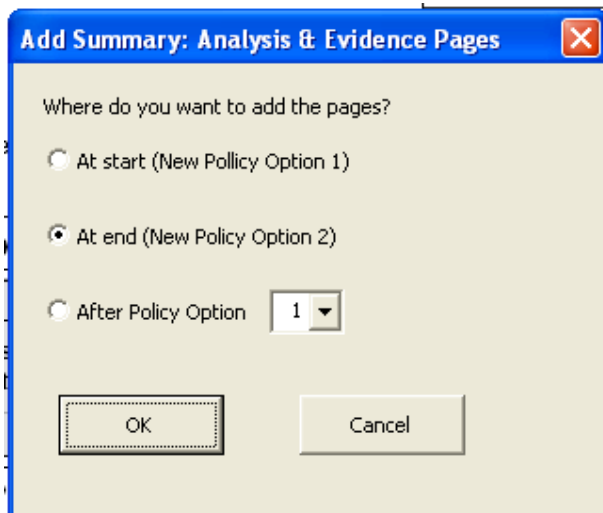
Add/Remove Policy Options

A single *Policy Option* 'section' is included when a new IA document is created via the IA Template. Each additional *Policy Option* that is required should be generated by selecting *Add Section For New Policy Option* from the *Add/Remove Policy Options* button on the toolbar.

It should be noted that each *Policy Option* added is numbered sequentially according to its position in the document, and not according to the order it was added.
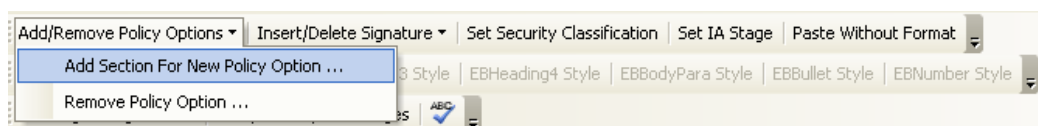

A further dialog box will ask the User to specify the position of this new *Policy Option* in relation to pre-existing *Policy Options*:

Use the *Remove Policy Option* choice, under the same initial Toolbar button (*Add/Remove Policy Options)* to remove any policy option(s) that are no longer required:
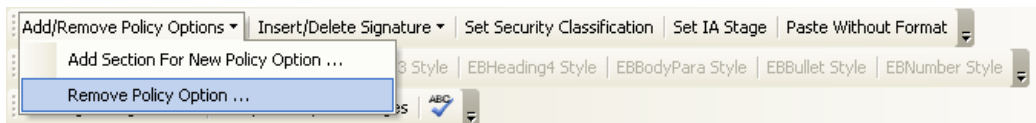
A dialog box (see below) will ask which existing *Policy Option* should be deleted. The remaining *Policy Options* will automatically be renumbered sequentially. If multiple *Policy Options* should be deleted then simply repeat the process.
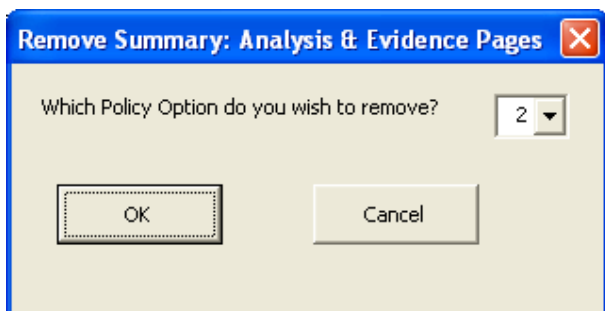

Insert /Delete Signature

At the bottom of the first page of the IA, there is a space where the Minister, Chief Executive or Chair responsible for the policy must sign it off. You can use a prepared signature graphic at this point. To insert the graphic when your IA has been approved by the responsible signatory, use the *Insert Signature Graphic* command from the *Insert/Delete Signature* menu. A window will open so that you can browse and select the graphic before

clicking the *Insert* button. When you insert the graphic it will be scaled and positioned automatically. Inserting a graphic automatically enters the date when the signature was added. You can edit this date manually if you need to amend it. If you need to remove a signature graphic, use *Delete Signature Graphic* from the same menu. This will also remove the date.

Set Security Classification

Use this button to select and apply a security classification that will appear in the header of each page. There are five classifications to select from: *Protect; Restricted; Confidential; Secret;* and *Top Secret*.
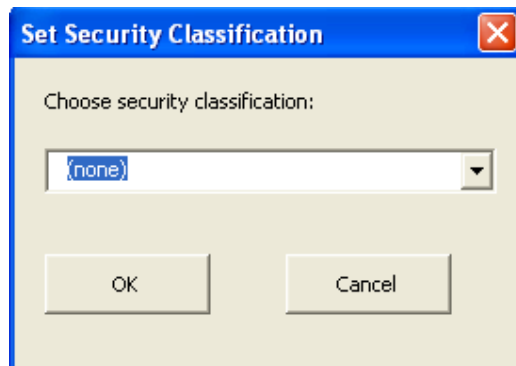
Set IA Stage

The stage of the IA is selected from the pop-up window that appears when a new document is created from the template. You may want to change the stage of an existing document, however. For example, if an IA is moving from *consultation* to *final* stage, you may want to keep the original version by saving as a new document and amending the stage. Use this button to update the *stage* setting, or correct an incorrect initial selection.
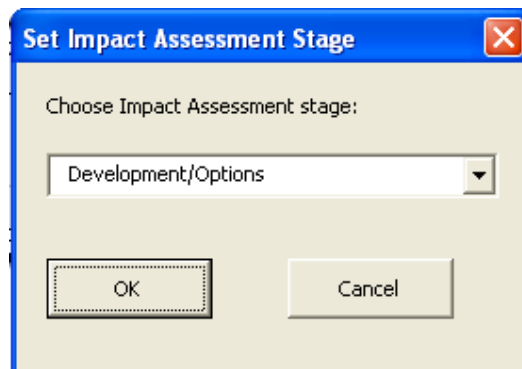
Paste Without Format

Many of the text fields in the template are protected, pre-formatted, form fields which do not support additional formatting such as tabs, bullets, bold, italics etc. They will also ignore any formatting applied to text that you copy and paste from another document. The Evidence Base and the Annexes sections are, however, unprotected and you can copy prepared text from another document and paste it into these sections. However, because there is a risk that the introduction of external text may not conform to the standard format, we recommend that text from external documents is copied in the normal way but then pasted into position using this button. You can then use the EB styles (see below) on the toolbar to apply heading and paragraph formats consistent with the template.

Tracking Changes is Off / Tracking Changes is On

If the toolbar button reads '*Track Changes is Off*', it means that track changes is not currently enabled. If you click on the button, which toggles, it will enable the track changes and its status will be changed to '*Tracking Changes is On'*.

Accept or Reject Changes

This button will open a dialog through which user can accept or reject changes which he/she made or traverse through those changes.
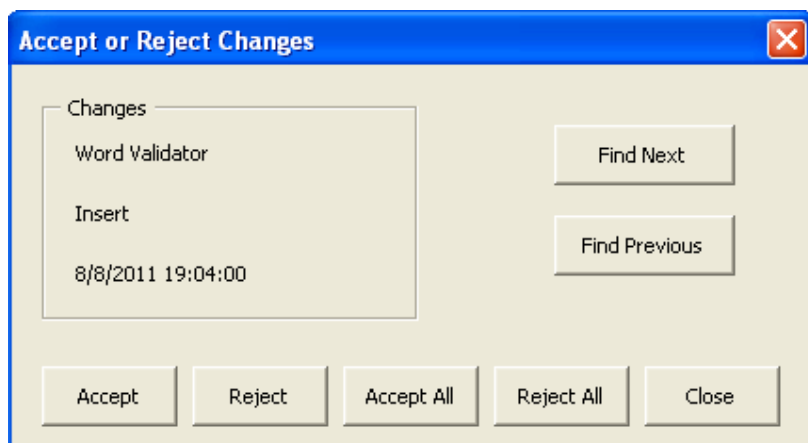
EB Styles

Use the buttons to apply standard styles to text in the Evidence Base to keep the formatting consistent. *Note:* the toolbar containing the EB* styles is only available when the User is editing the *Evidence Base* 'section' of the document.

IA template version

From Version 3, a "Help" feature will enable the user to establish the precise release number of the installed template.

The release information for the first template containing this functionlaity is displayed below: