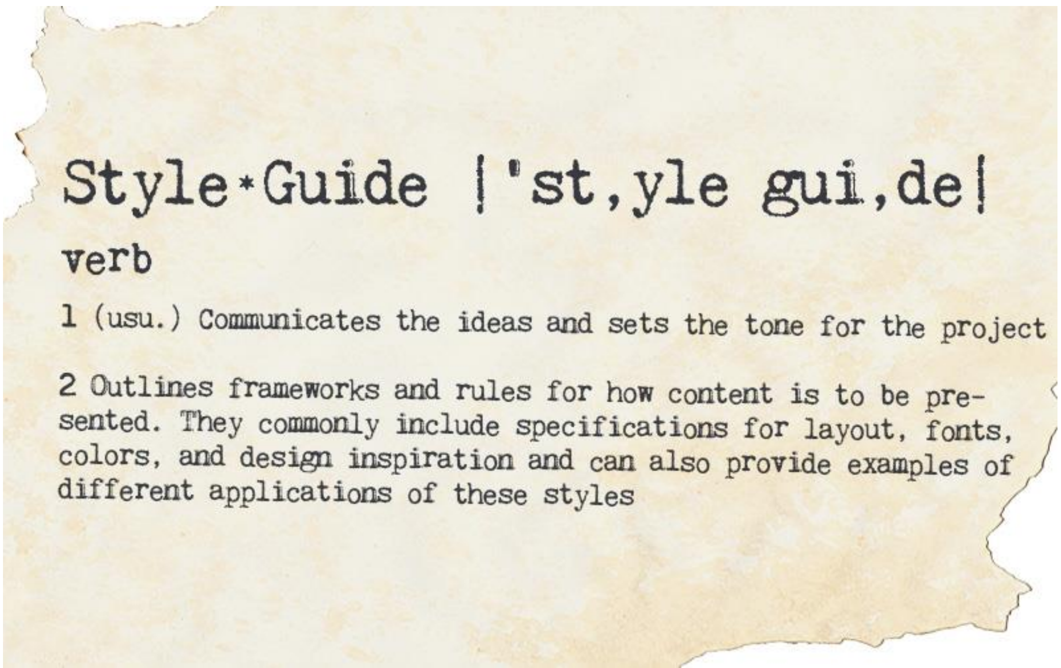
Tenco Style Guide



Revision 2.2
May 15, 2024

Prepared by

T U R N E R
E N G I N E E R I N G
C O R P O R A T I O N

2006 Glyndon Avenue Venice, CA 90291 tele (310) 915-7601
www.turner-engineering.com

Revision History		
Date	**Rev.**	**Change**
April 18, 2017	1.0	Initial release.
December 14, 2018	1.1	Updated the style of the “Table of Contents”
February 12, 2019	2.0	Updated Section 2.4 – Formatting Etiquette Updated Section 2.6.3 – Tables Added Section 2.6.4 – Field Codes for Tables & Figures Updated Section 5 – Work Product Delivery Guidelines Added Section 6 - Appendix A Submittal Package Checklist
May 18, 2021	2.1	Remove header
May 15, 2024	2.2	Added new Word Styles based on Section 2.6 Removed unused Word Styles Updated Section 2.4 – Formatting Etiquette Updated Section 2.6.2 – Graphics Updated Section 2.6.4 – Captions for Figure and Table Numbers Updated Section 2.7 – Headers and Footers Updated Section 2.7.2 – Footer Updated Section 4 – Excell Documents Fixed formatting and punctuation errors Added header

Table of Contents

Tenco Style Guide

1 Introduction

Turner Engineering Corporation (Tenco) serves more than 50 customers across the globe. Tenco employs more than 50 full-time and part-time employees and independent consultants. Project managers and lead analysts handle anywhere from 5 to 20 projects and are responsible for the technical content and quality of analyses, reports, reviews, and customer correspondence.

To unify our documentation, this Style Guide contains the typical Tenco formatting styles, formats, and practices mentioned in this document. If a project doesn't require its own specific formats, please use this document as a template and follow the guidelines to create your Tenco report.

This Tenco Style Guide is a Microsoft Word template, with all the styles and settings correctly set and ready for use. For example, if the writer starts a document using this style guide as a template, the writer does not have to worry about the formatting details.

2 Microsoft Word Documents

2.1 File Name

1. File naming conventions
   a. Choose a file name that describes the content.
   b. Use keywords and acronyms to make it possible to search.
   c. A shorter file name is better, but be clear.
   d. Only use underscores in file name; if client demands it. Microsoft search misses words when they are linked by underscores.
   e. Include rev level.
   f. Include edit date in YYYY-MM-DD format. This ISO 8601 format is unambiguous and internationally understood.
   g. Include your initials following the date when sharing versions among staff. No initials in version sent to customer.
   h. No need for words like "in progress;" everything is in progress until we submit. We create clear submittal folders to contain the submittal documents.
   i. Example: "Siemens AAF Maintenance Tasks Rev 0.1 2016-10-31 BAL.xls"

2. Update the "Properties" tab when saving a document
   a. Set the Author's name.
   b. Set the Title of the document.

3. Use .doc instead of .docx if possible, to keep files simple.

4. Save a new file with the current date and your initials when you edit a shared document.

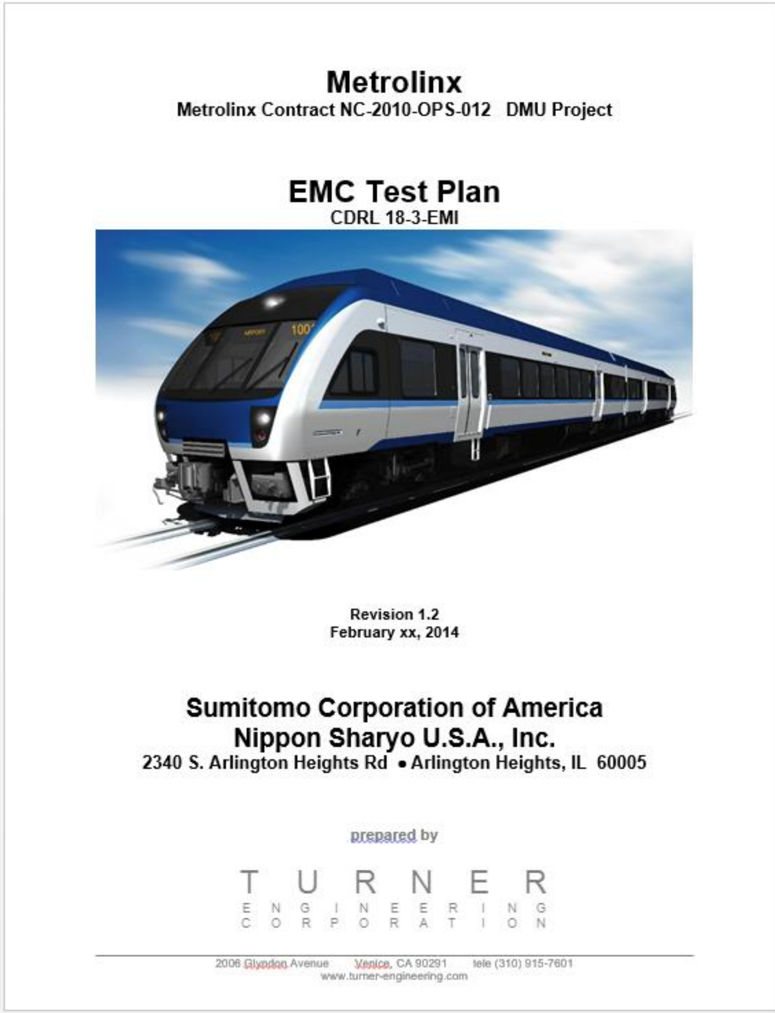
2.2 Cover Page Format

The information lines for a Tenco Cover Page have a consistent layout:

a. Authority Name
b. Project Name and Contract, if applicable
c. Document Name
d. CDRL #, if applicable
e. Picture, if applicable
f. Revision Number or Level
g. Document Date
h. Tenco Customer or Prime Consultant, if applicable
i. Tenco Info

See Figure 2-1 for a sample Tenco Cover Page.

Figure 2-1
Cover Page Example


Metrolinx
Metrolinx Contract NC-2010-OPS-012 DMU Project

EMC Test Plan
CDRL 18-3-EMI

Revision 1.2
February xx, 2014

Sumitomo Corporation of America
Nippon Sharyo U.S.A., Inc.
2340 S. Arlington Heights Rd • Arlington Heights, IL 60005

prepared by

TURNER
ENGINEERING
CORPORATION

2006 Glyndon Avenue Venice, CA 90291 tele (310) 915-7601
www.turner-engineering.com

2.3 Styles

1. All Headings: Arial Bold font
   a. Heading 1: 12 pt.
   b. Heading 2: 12 pt.
   c. Heading 3: 10 pt.
   d. Heading 4: 10 pt. with italics

2. Header 1 always starts a new page.

3. For space before a new section number, add 2 lines. For space after a section number, add 1 line. For a new section at the top of a page, add 1 line before the section number.

4. For section numbers, don't use auto formatting for spacing before and after.

5. Check the pagination so there are no floating section titles.

6. Delete unused Word Styles in documents.

2.4 Formatting Etiquette

1. Manually add 1 line after each paragraph. Do not use “Before Spacing” and “After Spacing” under the Paragraph Settings menu; see Figure 2-2. Auto spacing makes it impossible to control where text is at the top and bottom of the page.

2. Don’t use Widow and Orphan Control in the Paragraph setting. Use manual lines and page breaks to set page layout and spacing. Don’t split paragraphs across a page break.

3. Use 2 spaces after each period. Configure Word to check for single spaces by going to File > Options > Proofing > When correcting spelling and grammar in Word > Settings > Punctuation Conventions > Space between Sentences. Select “two spaces.”

4. Leave 1 line at the top of each page before wording starts.

5. Report Body Text: Times New Roman, 12 pt.

6. Left-justified body text.

7. Page Margins: 1” on each side (typically).

8. For abbreviations, use SI conventions (see file “IEEE abbreviations.pdf”).

9. Leave a full space between the quantity and the symbol.
   - 45 kg for kilograms (not 45kg, kilograms)
   - 32 °C (not 32°C)

10. Use a leading zero in front of a decimal fraction.
    - t = 0.40 s (not t = .40 s)

11. Be consistent with capitalization (i.e. ‘Master Controller’ or ‘master controller’); do not mix both in a document.

12. Use industry standard terms correctly (i.e. ‘trainline’ instead of ‘train line’).

13. Use terms as defined in the project specifications.

14. Spell out acronyms the first time, with the acronym in parentheses immediately after. Use the acronym thereafter.

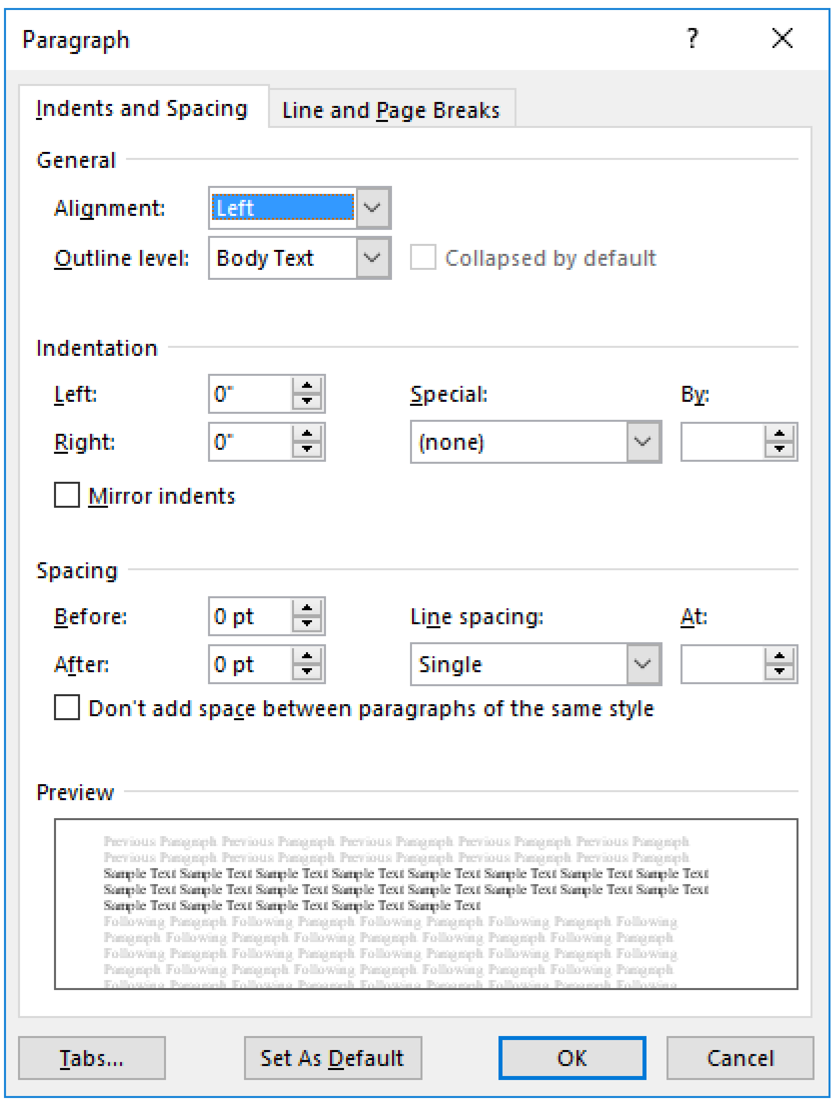
15. Use “Track Changes” on Review ribbon when revising a document to show customer the delta from the previous submission. “Track Changes” is not required for new documents.

16. In “Track Changes Options,” do not show “Formatting.” At a minimum, show “Insertions and Deletions” and “Comments.”

17. Use “Show/Hide ¶” command on Home ribbon to show paragraph marks and other hidden formatting symbols. This is especially useful for advanced layout tasks.

18. Place a figure at the next “clean” spot after it is referenced. So, Figure 2-2 is cited in item 1 of the list above. Choices are to put it before item 2, or on the start of the next page. In this case, we put it on the next page so the list stays together.

Figure 2-2
Paragraph Settings Menu



2.5 Bullets and Numbering

A bullet list typically has an intro text:

- Typical indentation for bullets or numberings is 0.25”
    - Sub-bullets or next level of numbering should be indented another 0.25”
    - Generally, there should be at least two bullets at each level. A single bullet is a “sad orphan.”

- It’s ok to have bullet lists split by a page break. But it’s better to start on a new page instead of having a bullet list that has only one bullet just before the page break.

- Typically don’t add lines between bullets or numbered lists if the bullets are each one line. If the bullets are multi-line, put a space between each bullet.

- If bullets are single spaced, the list should start on the line after the intro text. If bullets are separated by a blank line, there should be a blank line between the first bullet and the intro text.

2.5.1 Styled Bolded Lists

Use styled bolded numbered list for special emphasis on procedural steps. Use 10 pt Arial Bold for the List item, and Times New Roman 12 for the text. Here is one example:

1] **Submit a Test Procedure:** Nippon Sharyo will develop and submit a test procedure compliant with subsection 4.2.

2] **Perform the Test:** Nippon Sharyo will perform an Inductive Emissions Field Test compliant with the test procedure. In the test, Nippon Sharyo will demonstrate that the train's worst-case emissions do not exceed the specified limits.

3] **Submit a Test Report:** Nippon Sharyo will document the test and submit a test report compliant with subsection 4.2 for MX approval.

2.6 Figures and Tables

Table # & Title and Figure # & Title captions are located at the top, above the Figure or Table; see Figure 2-3 for an example.

Table and Figure numbers should restart with each main section (Header 1 sections). For example, Figure 1-1, 1-2, 2-1, 3-1.

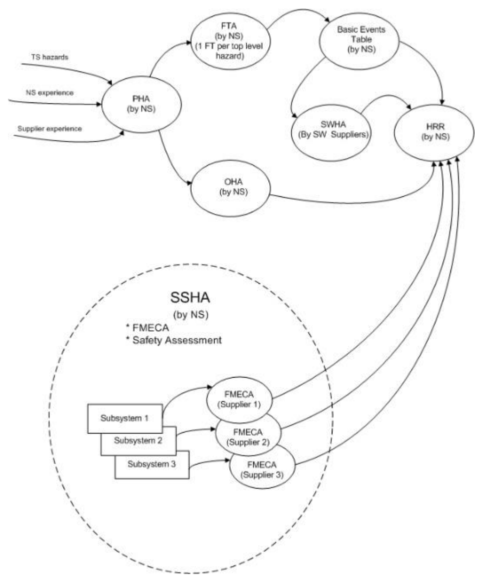
2.6.1 Figures

1. Caption Text: Arial

2. Figure Number: Arial Bold, 10 pt. Use the “Table Number” Word Style.

3. Figure Title: Arial Bold, 12 pt. Use the “Table Title” Word Style.

Figure 2-3
Figure Example



2.6.2 Graphics

It's always a bit of work to compress diagrams to get them to look ok and not make the doc file huge. Doubly hard when someone is using a Mac with Word, as Mac pasted graphics often don't read when opened in a PC.

Use a graphics program, downsample to 800x600 dpi, and paste as graphic.

- Never embed a Microsoft object.
- .png files don’t convert to .pdf very well.
- But .emf (windows metafile format) always converts perfectly.
- .tif files are often HUGE. Convert the picture to a compressed format (.jpg with a reasonable compression ratio) and the file size ended up being less than a megabyte.

To find big items in a file, save the DOC as a HTML; this creates a folder with all the images and other document items. In file explorer you can see the size of each item. Then, go back to the document and replace the big things. The HTML folder has all the image files in one place for easy resizing.

Another solution for pictures already pasted in a document – double-click on a picture and open the "Picture Tools Format" ribbon. Then click on "Compress Picture" and apply to all pictures in the document to reduce the file size.

When resizing images, scale from the corner of the image to preserve the aspect ratio. Scaling from the sides distorts the image. Crop images as needed.

2.6.3 Tables

1. Table Text: Arial

2. Table Number: Arial Bold, 10 pt. Use the “Table Number” Style.

3. Table Title: Arial Bold, 12 pt. Use the “Table Title” Style.

4. Table Headers: Arial Bold, 8 pt.
   - Headers are less important information than the content of the table, so they should be smaller.
   - Apply a gray color background/shading to the header row.

5. Table Content: Arial, 10 pt.
   - Table Content should be center aligned for short content and left aligned for long content.

6. Table Margins (use “Cell Margins” under Table Tools on ribbon):
   a. 0.02" top and bottom margins per cell
   b. 0.08" left and right margins per cell

Table 2-1
Table Example

Publisher	Document Number	Title
SMART	SMART Contract VS-EQ-10-001	Procurement of Diesel Multiple Units, Systems Support and Spare Parts, includes the Technical Specifications
NS	CDRL 16-1	System Safety Program Plan
U.S. D.O.D.	MIL-STD-882C	System Safety Program Requirements

Table Tips:

1. All acronyms should appear in an Acronyms Table.

2. All reference documents should appear in a References Table.

3. Abbreviations/Acronym and Reference Tables should only contain information that is actually in the document. Minimize length of these tables; no padding needed.

4. Be consistent when naming reference documents (naming convention).

5. Don't spell out a reference already listed in the Reference Table (i.e. "CDR for Clown Cohesion in Jumbled Sections (SRR-RST-ELC-42-HUT-HUT) ***[78]*** Section 8.2 states,…" should be "Reference ***[78]*** Section 8.2 states,…" or "***[78]*** Section 8.2 states, …"

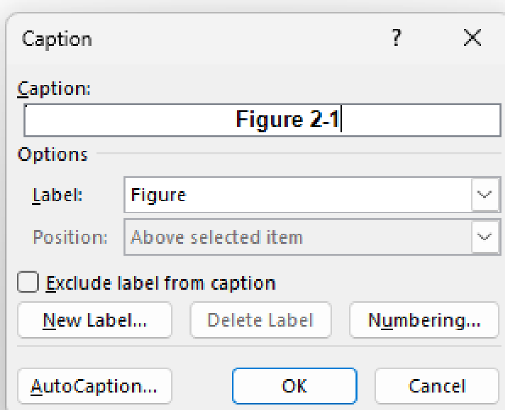
6. Use Bold, italic font for reference numbers.

2.6.4 Captions for Table and Figure Numbers

Captions can be used to create table and figure numbers that are automatically re-numbered as the document is updated. Captions also allow for references to figure and table numbers that automatically update as the figure and table numbers change. This automatic numbering only works if all figure numbers or all table numbers in a document are inserted as captions.

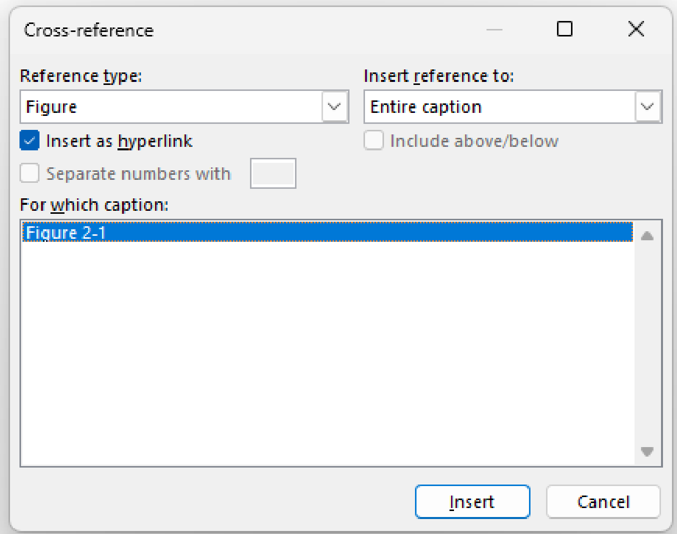
To insert a caption, go to References > Captions > Insert Caption. Select between the "Table" and "Figure" labels as shown in Figure 2-4.

Figure 2-4
Caption Dialog Box



To insert a reference to a captioned figure or table, go to References > Captions > Cross-reference. Select "Figure" or "Table" as the reference type, then select the caption you want to reference as shown in Figure 2-5.

Figure 2-5
Cross-reference Dialog Box



Captions and cross-references are updated by selecting the text, right clicking, then selecting “Update field,” the same as the table of contents.

To create a list of figures or list of tables using captions, go to References > Captions > Insert Table of Figures. The inserted list will not include figure or table titles, these have to entered manually.

2.7 Headers and Footers

1. Text: Arial, 8 pt.

2. Update headers and footers before submitting documents.

2.7.1 Header

1. “Project Name” in upper left corner; “Document Name” in upper right corner.

2. Header from Top: 0.5”

2.7.2 Footer

1. “Tenco” in lower left corner; “Page #” in middle; “Date and Revision” in lower right corner. The date and revision should be formatted as: “Month DD, YYYY – Rev X.Y”

2. Footer from Bottom: 0.5”

3. Cover Page, Revision Page and Table of Contents should use lower-case Roman numerals (i, ii, iii, etc.) for the page numbers.

4. First page of the main body is "Page 1"; change the footer to re-start using Arabic numbers (1, 2, 3, etc.) for the page numbers.

5. Appendix page numbers should include the appendix letter followed by a hyphen instead of “Page.” For example, Appendix A should have page numbers A-1, A-2, A-3, etc.

2.8 Change from Portrait to Landscape Orientation

1. Select “Section Breaks, Next Page,” (select Page Layout > Breaks) if you need to add a landscape orientation table into the document or if you need to create different headers or footers.

2. Add a second “Section Break, Next Page” only if you plan on returning to your original page orientation.

3. Change the Page Orientation of the new section, between the Section Breaks.

4. Go to Header (double-click in Header area), de-select “Link to Previous” in the new section and the section afterwards.

5. Go to Footer, de-select “Link to Previous” in the new section and the section afterwards.

6. Then modify the header or footer information in the new section only. If you forgot to de-select “Link to Previous,” you will create a mess of all the sections afterwards.

2.9 Revision Level

Most often, the customer determines the revision level of the document.

Internally, use date stamps and initials in the filename to keep track of revisions while working on the next submittal.

If you are responding to a customer’s review comments, typically increment the Revision Level by one.

If it is Tenco document, use Rev. 0.1 as the first draft, Rev. 1.0 is first release. Rev. 1.1 is a minor update of Rev 1.0. Rev. 2.0 is a significant update or response to client comments.

2.10 Advanced Settings

When doing cutting and pasting between documents, it is convenient to change some settings under the Advanced Menu (select File > Options > Advanced). See Figure 2-6 for the default setting for the Advanced Cut, copy and paste options.

To minimize changes in style between documents and even within a document, change settings within the Advanced Cut, copy, paste options; see Figure 2-7. Change “Keep Source Formatting (Default)” to “Keep Text Only.”

Figure 2-6
Advanced Word Options – Default

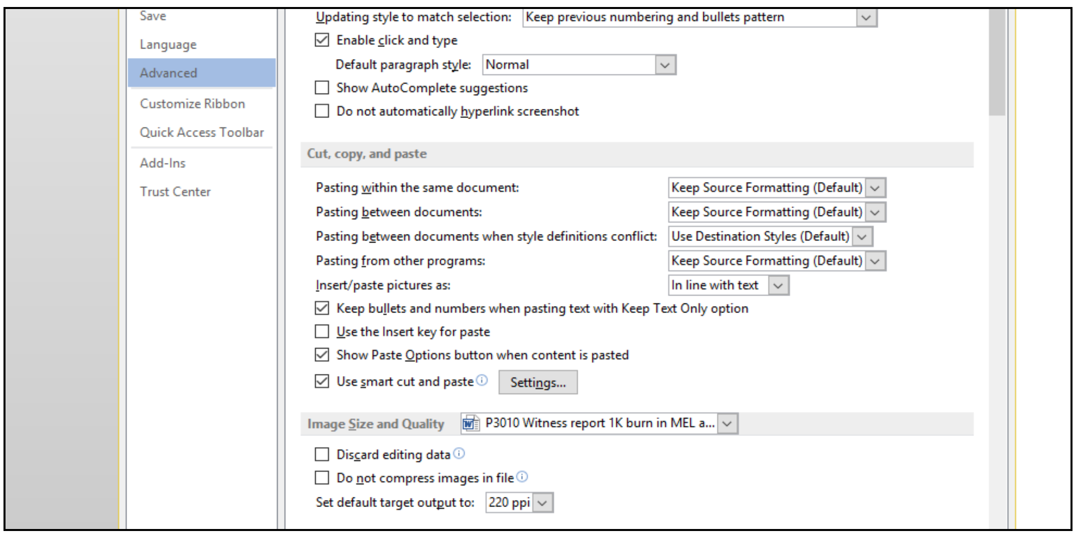
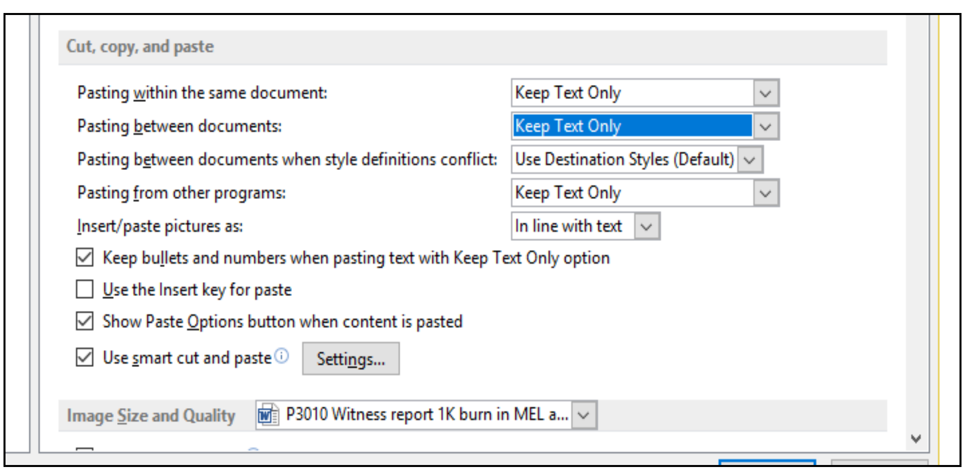


Figure 2-7
Advanced Word Options – Recommendations



3 General Writing Comments

Make your writing say 'who' did 'what.' Make the sentences move an idea forward. Put action into writing to cut down clutter. Use few words to say what is needed.

Keep our customer in mind and advocate for them.

<u>Writing Tips:</u>

1. Your first pass: develop content
2. Your second pass: copy edit your own work
3. Third pass by others: Tenco review and QC check

3.1 Active vs. Passive Voice

The difference between “active voice” versus “passive voice” is that the active voice sentence says “who” did what.

- “The report was edited to meet Tenco standards” is passive voice. The sentence doesn’t say who did it.
- “Bernice edited the report to meet Tenco standards” is active voice.

Active voice is the Tenco standard.

In transmittal letters, we want to be clear, and we want to be clear who will do what, so we say "Tenco will do A, B, C. Tenco expects Supplier to do D, E, F."

Passive voice is a problem because its ambiguity leaves the reader uncertain about who did what.

From http://www.plainlanguage.gov/howto/quickreference/dash/dashactive.cfm:

> “Is using the passive voice appropriate in some situations? Using the cut passive form is appropriate in two situations:
>
> - When we do not know who performed the action.
> - When the doer of the action is unimportant.
>
> However, one caution: If adding the name of the person or organization performing the action would make the document stronger and help our readers, we should try to identify the doer of the action.”

3.2 Examples of Active vs. Passive

Passive: It will be handled.
Active: We will handle it.

Passive: "Additional coordination between the Authority and the relevant FCC and FAA offices would help ensure that any potential impacts are eliminated."
Active: "The Authority will work with the airport and cooperate with the relevant FCC and FAA offices to eliminate potential impacts."

Passive Voice:

a. Propulsion is disabled by fail-safe circuits during these conditions:
   i. Activation of Emergency Brake
   ii. Doors are open while the train is stopped
b. Doors are prevented from opening by fail-safe circuits while the train is moving.

Active Voice:

a. Fail-safe circuits disable propulsion during these conditions:
   i. Emergency Brake Activation
   ii. Open Doors when train is stopped
b. Fail-safe circuits prevent door opening when train is moving (or during train movement). Also, if Zero Speed is at/below 3 MPH, may be more suitable to use "below Zero Speed."

Ambiguity occurs when the subject is missing.
1. "A signal is sent to X" is ambiguous because it does not say what sends a signal.
2. "A signal is sent to X by Y" is passive voice, but says what sends a signal.
3. "Y sends a signal to X" is active and concise, but conveys no more information than 2.

- Taking time to change from 2 to 3 doesn't address the real ambiguity: what signal does Y send to X?
- Edit ambiguous sentences to be unambiguous. Use active voice as much as possible, time permitting.

4 Microsoft Excel Documents

When making changes in MS Excel, use different font colors to track changes, and generate a key to instruct the reader if more than one color is used. MS Excel does not have “Track Changes” command.

Spreadsheets must be formatted for printing with correct headers, footers, and page breaks. Headers and footers should be formatted as described in Section 2.7. Page breaks should not affect the readability of the document. Table headers that are required to interpret spreadsheet contents should be visible on all pages of the spreadsheet, not just the first page.

5 Work Product Delivery Guidelines

Tenco expects all analysts to deliver quality analyses, as well as, accept the responsibility of preparing submittal packages as part of the Tenco production process.

See Figure 5-1 for a flowchart describing the workflow for the Tenco production process. The dashed green line in Figure 5-1 ends the “Analysis” process and starts the “Delivery” process.

The **Analysis** portion of the task is primarily the domain of the analyst, and takes weeks or even months. The analyst must be self-motivated during this time, and needs to recognize when they need information or consultation. When corresponding about the project, please copy (Cc) the entire project team on emails.

The **Delivery** portion of the task starts when the analysis is largely complete. Final quality control (QC) checks and reviews root out the remaining defects in the documents. Often, the analyst “declares completion” but there is still a lot of work remaining. Typical things we do while we prep for delivery:

- Copy editing the WORD and XLS files, primarily to purge passive voice.
- Preparing responses to comments from the carbuilder and/or authority.
- Draft submission emails.

Submittal package preparation responsibilities:

Analyst/ Preparer:

1. Assembles the submittal package in a Dropbox folder.

2. Checks submittal package using the Submittal Package Checklist; see Appendix A. After checking and assuring each item on the checklist, click the checkbox to put an X in the box. Save the checklist in the submittal folder.

3. Drafts a submittal email. Preparer attaches the checklist to the draft email. The completed checklist assures completion of the "minor" details before submittal.

Quality Control (QC) Reviewer:

1. Spot checks the submittal package.

2. Returns the submittal package to the analyst if the checklist is missing or not completed.

5.1 Creating or Revising a Document

1. Create a new folder in **Dropbox** for the next revision level of the document. Name the folder with revision level and planned submittal date. Follow the pattern already established in the current or similar project.
   a. Clearly label submitted documents in their own unique folder with submittal date under the appropriate Project folder.
   b. Archive older, obsolete versions in an "Obsolete" or "Archive" folder.

2. Create the document with a new filename, consisting of project name, document name, revision level, current date, and analyst initials.
   a. Example: "Caltrans-IDOT Bi-level Cars OHA Rev B 2014-10-10 track changes IAP.doc"

3. Use "Track Changes" in MS Word when revising an existing document/report; redlines for customer show delta from previous submission. "Track Changes" in MS Word is not required for new documents.

4. When making changes in MS Excel, use different font colors to track changes.

5. Make sure analysis scope matches system scope; body text analysis description matches analysis.

6. Remember who is your customer, and advocate for them.

7. Use direct **ACTIVE** voice. Copy edit to purge passive voice and pronouns (remove useless phrases that begin with "of, that, in"). Who is doing what?

5.2 Pre-submission Tasks

1. Update ***Title Page*** and ***Headers & Footers*** (Doc #, Revision level, Page #, date, etc.).

2. Update ***Revision History*** with details of all significant document changes/additions.

3. Update ***Table of Contents***, including List of Figures, List of Tables, and Appendices.

4. Check that ***References*** table/list matches references used in analysis. Include the revision level for all referenced documents.

5. All acronyms/definitions appear in the Acronyms / Definition Table.

6. Verify that all numbered references to Tables and Figures match with the body text descriptions.

7. Perform ***Spelling & Grammar*** check to avoid typos & passive voice.

8. Most current customers are requesting the report body in WORD format and the Appendices in native XLS format.

9. Format Excel spreadsheets for printing with correct headers, footers, page breaks and repeating column headings. Set page breaks such that analysis rows do not split across pages.

10. Some appendices, such as FTA and Service Affecting Failures, will need to be in PDF format. Make sure pdf files have the correct headers and footers to match the rest of the document.

11. Create pdf files as needed; merge document together as required.

12. Check ***file sizes***. When making PDFs, check that the file size is reasonable. Use ***foxit*** or similar software to reduce pdf file size.

13. Upload all documents to Dropbox.

5.3 Submittal Package

Create the package that your customer wants. Most customers request only the native files, including a clean and redlined WORD file report body and the XLS spreadsheets and PDFs for the appendices. Other customers want finished PDF files, ready to submit to their customer without any further edits.

Cover Email – create an email to your Project Manager

1. Cc: your project team.

2. Include the file path to the Dropbox location.
   (e.g. \Dropbox\Tenco\NS\Caltrans\Safety\S6 OHA)

3. Include a Draft of the customer facing, Submittal Email in your email to your project manager; see email example in section 5.4.

4. List and attach the required files to the email:
   - Analysis Report, clean copy with all changes accepted, in WORD (*.doc)
   - Analysis Report, with redline tracking, in WORD (*.doc)
   - Analysis Spreadsheet Appendix, clean copy, in Excel (*.xls)
   - Analysis Spreadsheet Appendix, with mark-ups, in Excel (*.xls)
   - Analysis Appendices in PDF (*.pdf) – for example: *Fault Trees* or *MDBSF extract from FMECA*

- Response to Customer Review Comments in either (*.xls) or (*.doc) format – as required

Optional, depending on customer:

- Submittal Letter for Supplier (i.e. NS) to Customer (i.e. Caltrans) in Word (*.doc)
- Complete Report Document, including Report & Worksheets, in one PDF file (*.pdf)

5. Include completed Submittal Package Checklist.

Check file sizes; try to keep the sum of all attachments under 10 MB.

- If the submittal package size (sum of attachments) exceeds 10 MB, then the analyst should:
  - Create a zip file, or
  - Split the submittal into multiple emails, or
  - Provide a DropBox location (if compatible country)

Never use ALL CAPS in an email draft. ALL CAPS = yelling.

5.4 Sample Cover Email Format

From: Bernice Lopp <bernice.lopp@turner-engineering.com>
Sent: Friday, October 10, 2014 11:59 AM
To: 'andyp@turner-engineering.com'
Cc: 'Steve Lawrence'; 'Adam Pattantyus'
Subject: Caltrans/IDOT OHA Rev B Submittal

Andy,

Here is Revision B for the Caltrans/IDOT Bi-Level Cars OHA.
Documents have been uploaded to Dropbox.
\Dropbox\Tenco\NS\Caltrans\Safety\S6 OHA\OHA Rev B (2014-10-10)

Here is a draft submittal email:
++++++++++++++++++++++++++++++++++
Dear Mizutani-san,

Here is Caltrans/IDOT Bi-Level Cars OHAR ev B.

Attached are:

1. Caltrans-IDOT Bi-level OHA Report Rev B (2014-10-10).doc
2. Caltrans-IDOT Bi-level OHA Report Rev B (2014-10-10) track changes.doc
3. Caltrans-IDOT Bi-level OHA App. A Rev B (2014-10-10).xls
4. Caltrans-IDOT Bi-level OHA App. A Rev B (2014-10-10) track changes.xls
5. Tenco – NS Comments – CAL-SUMI-0245-OHA (2014-10-10).xls
6. Draft SC-CAL OHA Rev B submittal letter.doc

Here is what we did:

- Added analysis for all cut-out valves
- Matched all cab controls to the Cab and Car Control FMECA.
- Updated OHA Rev B per Caltrans meeting notes dated 2014-09-01.

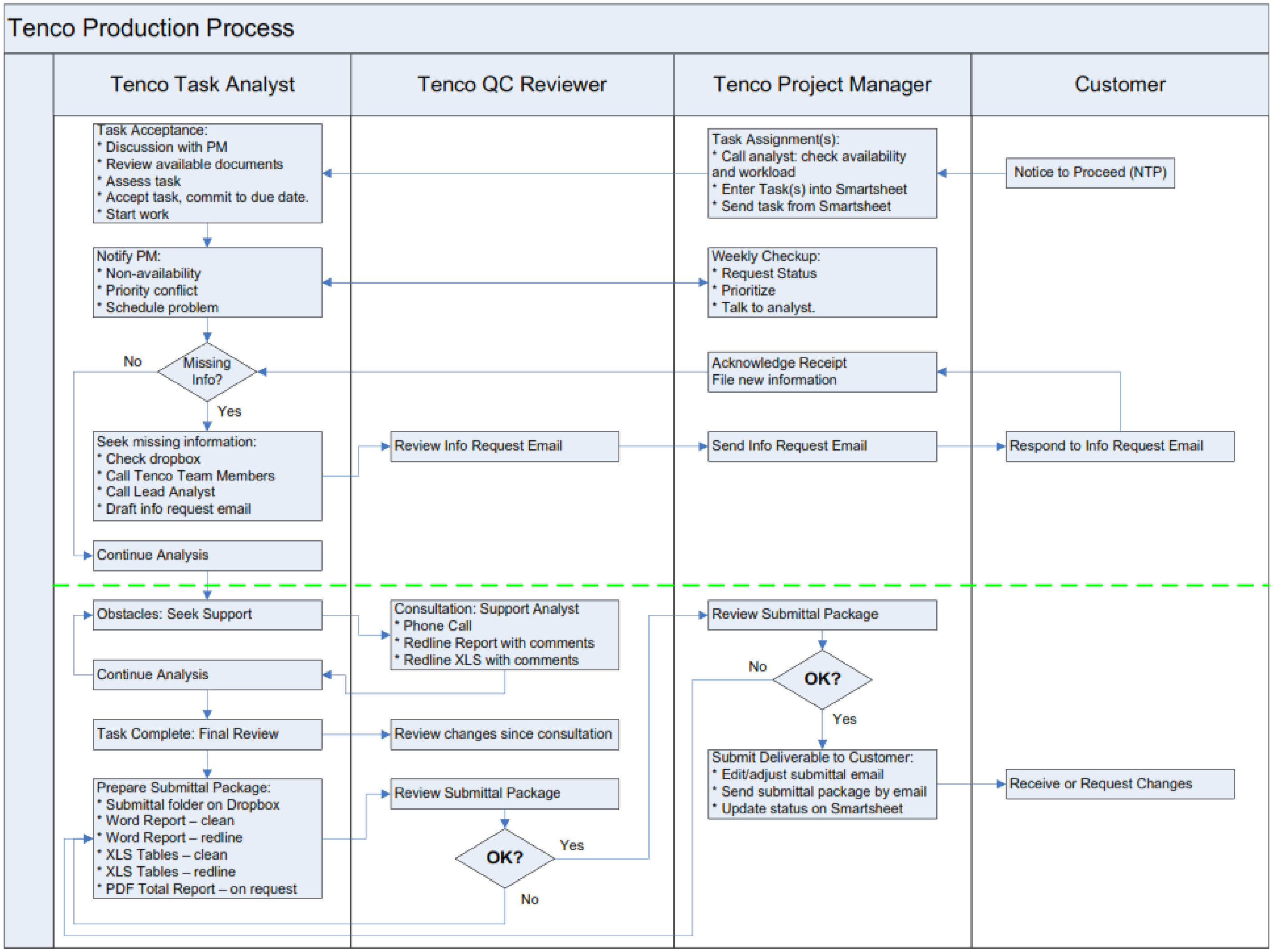
After your review and approval, these are ready to submit to Caltrans.

Regards,

Andy
++++++++++++++++++++++++++++++++++
Thanks,

Bernice Lopp

Figure 5-1
Tenco Production Process



Tenco Production Process Flowchart (2016-12-26).vsd

5.5 Project Management

Tenco's Project Manager submits the analyst's work product to the customer. The Project Manager may or may not be the person reviewing the work; depends on the project.

On all project document submittals to the customer, copy David Turner and the respective Project Manager, such as: Andy Pattantyus, Adam Pattantyus, Mike Thornburg, Gary Thompson and/or others.

Regarding overall project management, Adam or Andy Pattantyus will update the Smartsheet Tenco Master Active Task List.

6 Appendix A – Submittal Package Checklist

Submittal Package Checklist is also available as a separate Word file.

Tenco Methods Submittal Package Checklist

Submittal Package Checklist

Please address each item below, then click the checkbox. Include completed checklist with submittal package.

1 Pre-submission Checklist

☐ Does analysis scope match system scope? Does body text analysis description match analysis?

☐ Use ACTIVE voice.

☐ Update Title Page, Headers & Footers (Doc #, Revision Level, Page #, Date).

☐ Update Revision History, Table of Contents, List of Figures, List of Tables.

☐ Update References, including document revision levels and Acronyms / Definitions list.

☐ Use Spelling & Grammar tool.

☐ Verify Table & Figure references match with text descriptions.

☐ Check Excel spreadsheets printing format (headers, footers, page breaks & repeating column headings; set page breaks so analysis rows do not split across pages).

☐ Check PDF format (correct headers and footers to match the rest of the document).

☐ Check file sizes and upload documents to Dropbox folder.

2 Prepare Submittal Package

Submittal Email includes:

☐ Cc: your project team.

☐ File path to the Dropbox location. (i.e. \Dropbox_Tenco\NS\Caltrans\Safety\S6 OHA)

☐ List and attach the following files:

- Analysis Report, clean copy with all changes accepted, in WORD (*.doc)
- Analysis Report, with redline tracking, in WORD (*.doc)
- Analysis Spreadsheet Appendix, clean copy, in Excel (*.xls)
- Analysis Spreadsheet Appendix, with mark-ups, in Excel (*.xls)
- Analysis Appendices in PDF (*.pdf) – for example: *Fault Trees* or *MDBSF extract from FMECA*
- Response to Customer Review Comments in either (*.xls) or (*.doc) format – as required

Optional, depending on customer:

- Submittal Letter for Supplier (i.e. NS) to Customer (i.e. Caltrans) in Word (*.doc)
- Complete Report Document, including Report & Worksheets, in one PDF file (*.pdf)

☐ Draft of the customer facing submittal email.

☐ Completed Submittal Package Checklist.

*For more information, reference to the **Tenco Style Guide** for expanded guidelines on preparing documents and reports.*

Tenco Page 1 of 1 Revised: Feb. 12, 2019