

Used

Documentation Standard

Recommendations to format project documentation in Microsoft
Word

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Introduction

Purpose:

The «Documentation Standard – Recommendations to formatting project documentation in Microsoft Word» document has been created in order to establish and adhere to common rules/recommendations for formatting the project documentation to which it is applied;

Scope of the document:

The «Documentation Standard – Recommendations to formatting project documentation in Microsoft Word» document applies to any document created or maintained using Microsoft Word, as it has no specific/professional/industry-specific requirements or characteristics with respect to the documents to which it may be applied.

If there is a conflict with other standards or regulations, the priority for record-keeping is at the individual's discretion, but a separate paragraph is required explaining the conflict and the solution chosen.

Expected benefits of complying with the standard:

Following the «Documentation Standard – Recommendations to formatting project documentation in Microsoft Word» will improve the writing, reading, and understanding of project documentation.

By using a common template and a common set of rules, the main result will be uniformity and improved efficiency in the handling of project documentation.

1. Basic requirements for text styles

1.1. Formatting text elements:

Table 1.1.

Requirements for formatting text elements

Name	Font	Size	Features
Heading, level 1	Times New Roman	16	Bold
Subheading, level 2	Times New Roman	14	Bold
Subheading, Level 3	Times New Roman	14	Bold
Text	Times New Roman	14	-
Table caption	Times New Roman	12	-
Table title	Times New Roman	12	-
Table column header	Times New Roman	12	Bold
Table text	Times New Roman	12	-
Illustration caption	Times New Roman	12	-
Footer text	Times New Roman	12	-
Hyperlink text	Times New Roman	14	Underlined; Blue, accent 1, darker shade 25%
State	Times New Roman	14	-
Title	Times New Roman	40	-
Subject	Times New Roman	12	-
Author	Times New Roman	14	-
Publication date	Times New Roman	14	-

The «-» symbol indicates that there are no font and text selection features in the element.

1.2. Paragraphing text elements:

Table 1.2.

Requirements for paragraph settings of text elements

Name	Alignment	Indent first line	Interline indent
Heading, level 1	Center	-	1,5 lines
Subheading, level 2	Align Left	1.25 cm (0.49")	1,5 lines
Subheading, Level 3	Align Left	1.25 cm (0.49")	1,5 lines
Text	Justify	1.25 cm (0.49")	1,5 lines
Table caption	Align Right	-	1,5 lines
Table title	Center	-	1,5 lines
Table column header	Center	-	1,5 lines
Table text	Center	-	1,5 lines
Illustration caption	Center	-	1,5 lines
Footer text	Align Right	-	Single
Hyperlink text	Justify	1.25 cm (0.49")	1,5 lines
State	Align Left	-	Single
Title	Align Left	-	Single
Subject	Align Left	-	Single
Author	Align Left	-	Single
Publication date	Align Left	-	Single

The «-» symbol indicates that [(none)] is selected in the «Home/Paragraph/Indentation/Special» setting.

Other options: «Home\Paragraph\Indents and Spacing\Indentation» and «Home\Paragraph\Indents and Spacing\Spacing». Equal to [0 pt] or not used.

2. Basic requirements for text inserts

2.1. Tables:

2.1.1. Main features:

When working with tables, regular tables are used. They are inserted with «Insert\Tables\Table\Insert Table».

The table dimensionality is selected ad hoc, but the «Fixed column width» parameter should be «[Auto]».

There are no requirements for the internal structure of the rows and columns in the table, as a different one may be required depending on the source data.

If a table occupies more than one page, a «Table Caption» of the form is placed above its continuation: «Continuation of Table x.y.» (if the table does not end) and «End of Table x.y.» (if the table ends).

After the end of the table there should be an empty line.

2.1.2. Common properties:

Described under «Basic Requirements for Text Styles» subsection: [1.1. Formatting text elements](#); [1.2. Paragraphing text elements](#);

2.1.3. Common design:

Table title			Table caption		
Tables XYZ			Table 1.1.		
X	Y	Z			
10	2	5			
12	6	9			

Pic. 2.1. Table appearance

«Table title» is placed above the table and should also describe the topic and content of the table.

«Table caption» is used to number a table of the form: «Table x.y.», where «x» is the number of the chapter and «y» is the number of the table within the chapter.

2.2. Footers:

2.2.1. Main properties:

The settings in «Header & Footer\Position» for the distance from the edge to the footer should be [0.5 cm] (0.2").

2.2.2. Common properties:

Described under «Basic Requirements for Text Styles» subsection: [1.1. Formatting text elements](#); [1.2. Paragraphing text elements](#);

2.2.3. Header:

Stores 2 inserts from document properties: «Author», «State».



Pic. 2.2. Header footer appearance

2.2.4. Footer:

Keeps the insert page number of the form: «Page x|y», where «x» is the current page, «y» is the total number of pages.



Pic. 2.3. Footer appearance

Inherited footer style: «Header & Footer\Footer\Built-in\Grid». «Inherited style» implies - based on style X, but modified.

2.3. Illustrations:

2.3.1. Main properties:

Illustration means: drawings, graphs, schemes, including structural and logical, diagrams, photographs, drawings, etc.

Illustration requires changes in «Picture Styles\Figure Border»: Color – «black, Text 1», Thickness – «0.25 pt».

There should be a blank line spacing before and after the illustration (not including «Illustration Caption»).

2.3.2. Common properties:

Described in the section «Basic requirements for text styles» subsection: [1.1. Formatting text elements](#); [1.2. Paragraphing text elements](#);

2.3.3. Common design:



Pic. 2.4. Black square

«Illustration caption» is placed below the illustration and should describe the meaning of the illustration.

The caption is of the form: «Pic x.y.», where «x» is the chapter number and «y» is the number of the figure within the chapter.

3. Basic requirements for document elements

3.1. Headings:

3.1.1. Main properties:

- spacing between headings/subheadings blank line.
- each heading and subheading should have its own unique number, which is inherited from a higher-level heading, supplementing its number with a new ordinal number. For example: «3. XXX:», «3.1. XXX:», «3.1.1. XXX:», «3.1.2. XXX:»;
- at the end of the title of the heading shall be capitalized: «:»;
- main/major headings should start on a new sheet of paper.

3.1.2. Common properties:

Described in the section «Basic requirements for text styles» subsection: [1.1. Formatting text elements](#); [1.2. Paragraphing text elements](#);

3.2. Cover page:

3.2.1. Main properties:

The style and design of the cover page is inherited from «Insert/Pages/Cover Page/Sideline».

The cover page uses certain document properties: «Status», «Title», «Subject», «Author», «Publication Date».

Description of document properties:

- State – describes the current state of the document;
- Title – reflects the main meaning of the document;
- Subject – reflects the main meaning of the document's content;
- Author – the primary author/editor of the document;
- Publication date – the date of official publication of the document in the

new version of the issue, of the type: «00.00.00.0000», transcribed as «day.month.year».

The «Title» property cannot be modified in any way, otherwise it will be considered a new document, based on the old one.

The «Subject» property is subject to change if the meaning of the content in the document has been heavily edited or has received new material that requires mention in the subject of the document.

The «Author» property is subject to change only when the main author/editor is changed when working with a new version of the document release.

The «Publication Date» property is subject to change only when a new version of the document release is published.

The «State» property is subject to change depending on the current state of the document.

Table 3.1.

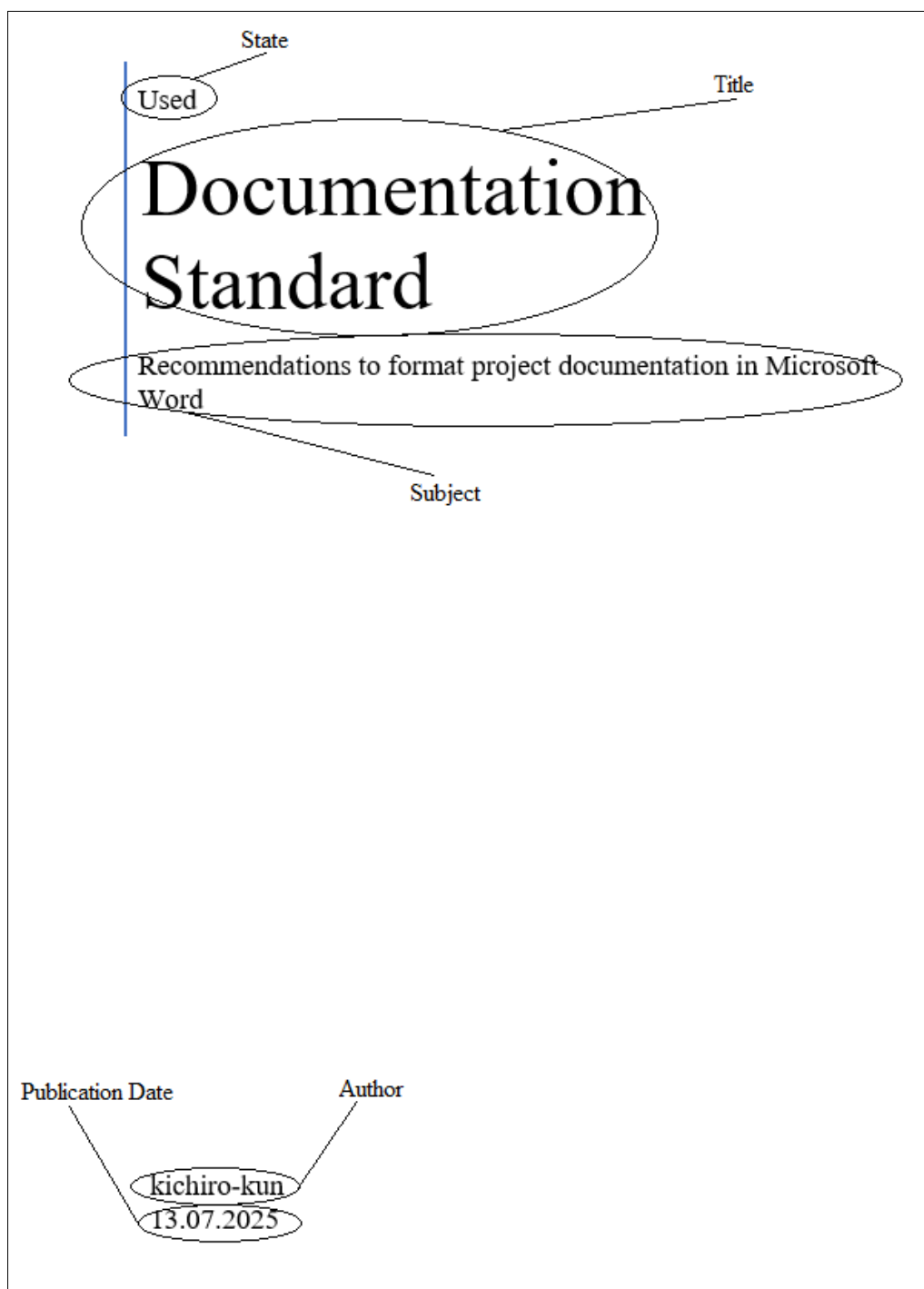
Table of values of the document property «State»

Name of state	State Description
In progress	A new document is being created, does not have a release version.
Used	The document has received an official release version and can be applied to project documentation.
Not relevant	The document is recognized as incapacitated, an alternative document is used, or the current document has received a new release version. In such a case, the property takes the form: “Not relevant after 00.00.00”, where 00.00.0000 is the date of decommissioning.
Edited	Certain edits are made to a document. (adding, deleting, editing)

3.2.2. Common properties:

Described in the section «Basic requirements for text styles» subsection: [1.1. Formatting text elements](#); [1.2. Paragraphing text elements](#);

3.2.3. Common design:



Pic. 3.1. Appearance of the cover page

4. Other requirements for the document

4.1. Page parameters:

The «Layout\Page Setup\Hyphenation» option must match [Automatic] throughout the document.

The margins of the document page are configured in «Layout\Page Setup\Margins\Custom Margins...\Margins», the following parameters must correspond to the set values: «Top» – [2 cm (0.79")], «Left» – [2.5 cm (0.98")], «Bottom» – [2.5 cm (0.98")], «Right» – [1.6 cm (0.63")], «Gutter position» – [Left].

4.2. Improving the readability and appearance of the text:

When working with text, in any form, whether it is the text of the table, the title, the caption and others. It is allowed to use «condensation» for the text.

The following setting is used: «Home\Font\Advanced\Character spacing», the «Spacing» field and the corresponding field with a numerical value.

The «Interval» field can only be used [Condensed], and the numerical value should not exceed, but can be equal to [0.6 pt].

If the elements of the document, be it tables, headings, figures, text and others. It is allowed to use «Page Break» through «Layout\Page Settings\Breaks» or put blank lines to go to the next page of the document of the required elements.

4.3. Requirements for page numbering and footer:

The title page of the document, described in paragraph "3. Basic Requirements for Document Properties" should be numbered as the 1st page, but any headers and footers should be hidden.

The last page of the document, in case of the presence/installation of special markings, for example, licensing, should hide any headers and footers.

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