



Enabling Grids for E-science - II

Templates of common documents in EGEE

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www.eu-egee.org



- **Part 1 - Introduction**
- **Part 2 - Detailed example**
- **Part 3 - Other things**
- **Part 4 - Questions and answers**

- **Word documents giving standard layout for common documents**
- **Instructions for the completion of common documents**
- **Documents to enhance your productivity**

What they are not!

- **Templates as defined by Word**
- **Documents to reduce your productivity**
- **Documents to reduce your creativity**

What they are intended to do!

- **Ensure that all project documents have similar**
 - appearance (especially fonts and page layout)
 - structure (front matter, introduction, executive summary etc)
 - branding including logos
 - Language
 - Vocabulary
 - work flow
 - source code format (Microsoft Office)
 - delivery format (pdf)

Which templates are available?

There are collections of templates for:

- Documents
- Presentations
- Web pages
- Project management
- Branding documents
- Spreadsheets

The most common document templates are:

- Activity deliverable (biggest and most complicated)
- Quarterly report/ Periodic report
- Dialogue form for moderated documents
- Review report for moderated documents
- Delivery note for moderated documents
- Meeting minute form
- Technical document/ report

- JRA2 maintains the collections
- JRA2 maintains the word documents
- NA2 provides the web site template
- NA1 provides the periodic and quarterly reports

Where can I get them?

- <http://egee-jra2.web.cern.ch/EGEE-JRA2/Template/EGEE-Template.html>
- This web site has links to all of the documents regardless of their location

- **Remove the blue ink – it contains instructions**
- **Follow a good example of a finished document**
- **Always think of content reuse (especially for quarterly reports as the text has to be moved)**
- **Always consider if it is possible to cut and paste text into another document and it will still be correct**

Can I deviate from the template?

Minor deviations which are ok include:

- **adding new styles where there is not one similar**
- **things which are required in the document eg maths**

Major deviations which are not ok include:

- **changing the page layout**
- **using tools other than Word (eg Open Office)**
- **redefining standard word style elements**

Ideas for change?

- **Always welcome, discuss them with Gabriel Zaquine in the first instance**

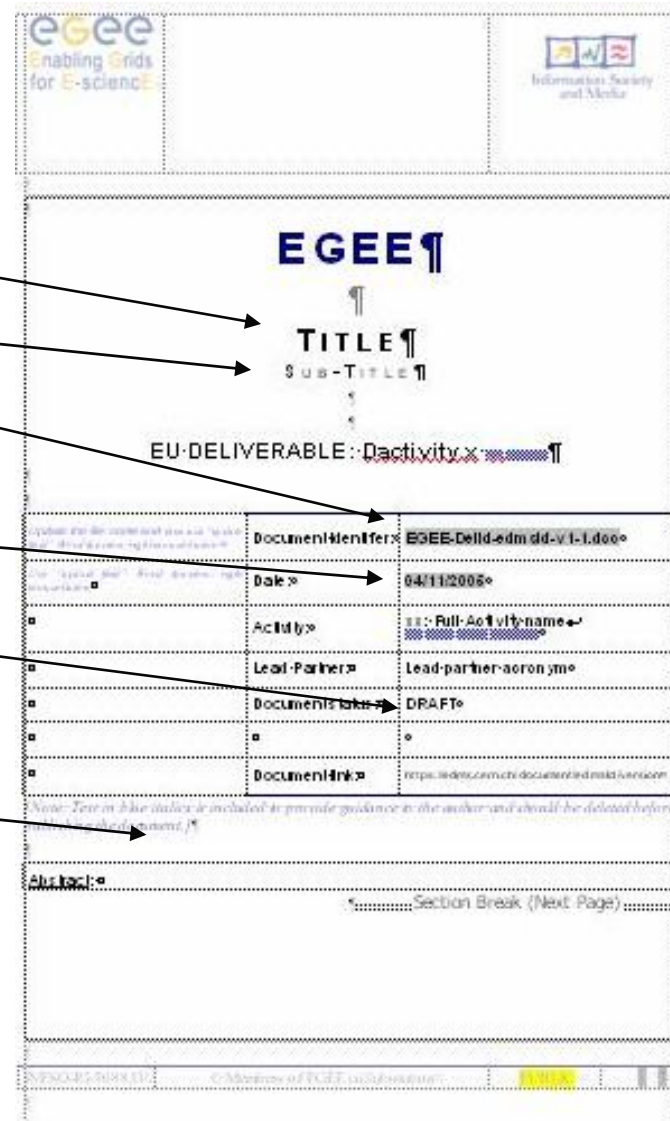
- **The deliverable is the longest and most complex template**
- **Once you can do a deliverable, the others are easy!**

- **What is a deliverable?**
 - Formal document from the activity of the project
 - Must be good quality
 - Must be ready on time
 - Must follow the moderation and review procedure
 - Usually a lot of work and involves many people
 - Records the state of some work in the project at the time
 - Planned part of the work of the project
 - a single pdf file is delivered to Brussels
 - the word file is required too

- **Read the instructions for creating a deliverable**
- **Get a previous example (try to get a good one!)**
- **Read the additional notes on the JRA2 web site**
- **Get a copy of the current template (it may change)**
- **Make an EDMS location to hold your document**

- **Plan both the writing and production of the document**
 - Different authors may be contributing different parts
 - May be best to have a co-ordinating editor to ensure consistency
 - Plan for the time to deal with the moderation and review phase

- Set the document language to English (UK)
- Title is linked to headers in the rest of the document
- Subtitle is also linked to headers in the rest of the document
- Filename is the Doc-ID and is linked
- Date is automatic and is the save date for the document
- Status words are:
DRAFT – UNDER REVIEW - FINAL
- Remove the blue ink (but read it and act on it)

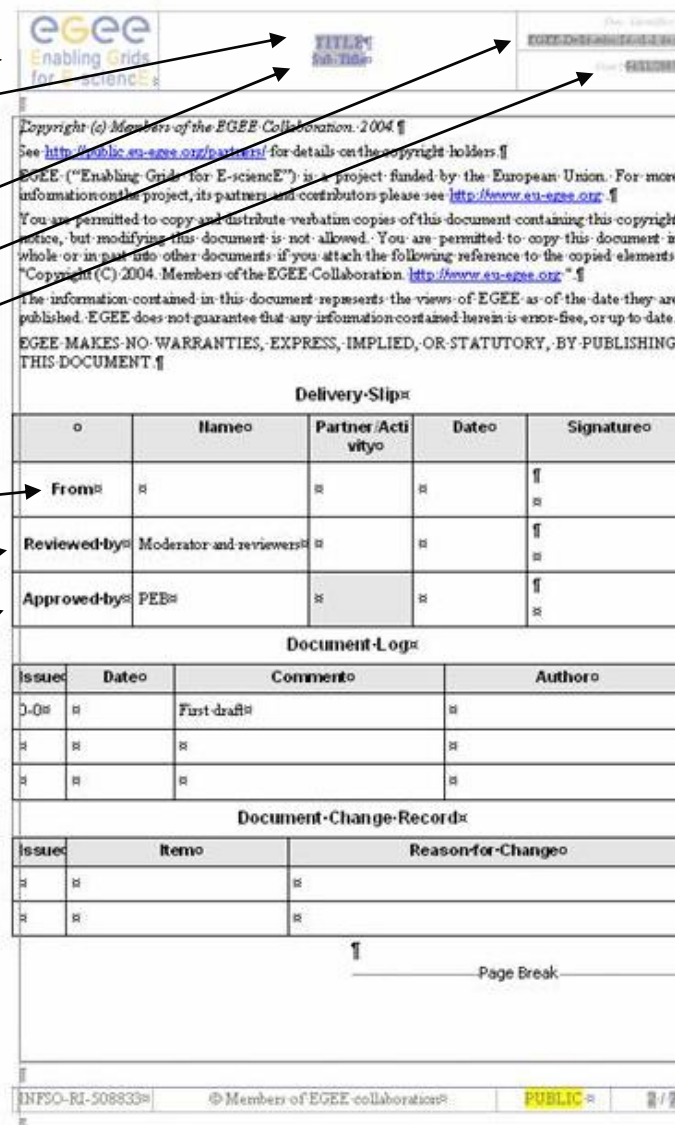


The screenshot shows a document front page with the following elements:

- Logos for EGEE (Enabling Grids for E-science) and Information Society and Media.
- Large text: **EGEE**
- Text: **TITLE**
- Text: SUB-TITLE
- Text: EU-DELIVERABLE: Dactivity
- Table with the following fields:

DocumentIdentifier	EGEE-Delid-edmdd-v1-1.doc
Date	04/11/2005
Activity	Full-Activity-name
Lead-Partner	Lead-partner-acronym
DocumentState	DRAFT
DocumentLink	https://descom.uct.ac.za/document/mid/15000
- Note: Text in blue italics is included to provide guidance to the author and should be deleted before the document is submitted.
- Section Break (Next Page)
- Footer: SPONSORING INFORMATION, © Members of EGEE, and a yellow box with the word "DRAFT".

- This is in a new Word section and has a different page layout
 - Title is taken from the title page
 - Subtitle is taken from the title page
 - DocID is taken from the title page
 - Date is taken from the title page
- From - Usually the activity manager
- Reviewed by: The moderator and each of the reviewers
- Approved by: Always the PEB
- Document log - New line for each revision - put version into filename
- Document change log - Intended if there are changes after approval - almost always empty

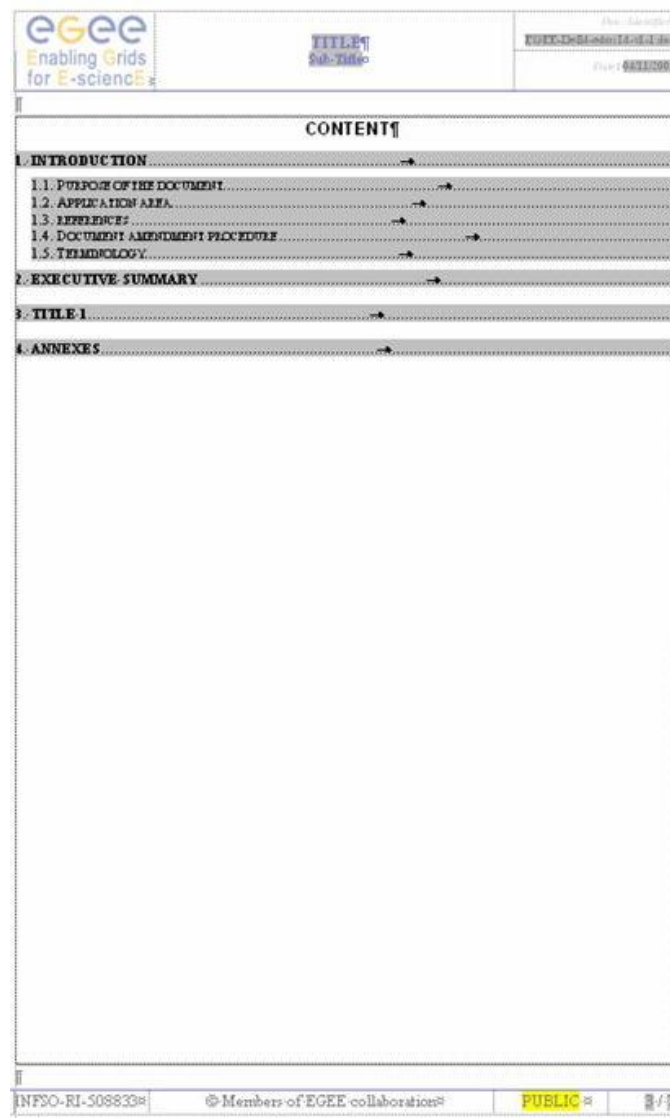


The screenshot shows a Word document front matter page with the following sections:

- Header:** EGEE logo, "Enabling Grids for E-science", "TITLE: Sub-Title", and "EGEE-DOCUMENTID: EGEE-RI-508833".
- Copyright:** "Copyright (c) Members of the EGEE Collaboration. 2004. See <http://public.eu-egee.org/partners/> for details on the copyright holders. EGEE ("Enabling Grids for E-science") is a project funded by the European Union. For more information on the project, its partners and contributors please see <http://www.eu-egee.org/>. You are permitted to copy and distribute verbatim copies of this document containing this copyright notice, but modifying this document is not allowed. You are permitted to copy this document in whole or in part into other documents if you attach the following reference to the copied elements: "Copyright (C) 2004. Members of the EGEE Collaboration. <http://www.eu-egee.org/>". The information contained in this document represents the views of EGEE as of the date they are published. EGEE does not guarantee that any information contained herein is error-free, or up to date. EGEE MAKES NO WARRANTIES, EXPRESS, IMPLIED, OR STATUTORY, BY PUBLISHING THIS DOCUMENT."
- Delivery-Slip:** A table with columns: Name, Partner/Activity, Date, Signature.
- From:** A row in the Delivery-Slip table.
- Reviewed by:** A row in the Delivery-Slip table with the value "Moderator and reviewers".
- Approved by:** A row in the Delivery-Slip table with the value "PEB".
- Document-Log:** A table with columns: Issued, Date, Comments, Authors.
- Document-Change-Records:** A table with columns: Issued, Remo, Reason-for-Change.
- Page Break:** A horizontal line with the text "Page Break" below it.
- Footer:** "INFSO-RI-508833", "© Members of EGEE collaboration", "PUBLIC", and a small icon.

- This is built by Word
- Use heading levels in document
- Only shows levels 1 to 3
- Capitalizes header 1
- Section numbering is automatic

- 1. INTRODUCTION
- 2. EXECUTIVE SUMMARY
- 3. TITLE
- 4. ANNEXES



CONTENT	
1. INTRODUCTION	4
1.1. PURPOSE OF THE DOCUMENT	4
1.2. APPLICATION AREA	4
1.3. REFERENCES	4
1.4. DOCUMENT AMENDMENT PROCEDURE	4
1.5. TERMINOLOGY	4
2. EXECUTIVE SUMMARY	5
3. TITLE 1	6
4. ANNEXES	7

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Chapter 1 always has the same headings

1.1. PURPOSE OF THE DOCUMENT

1.2. APPLICATION AREA

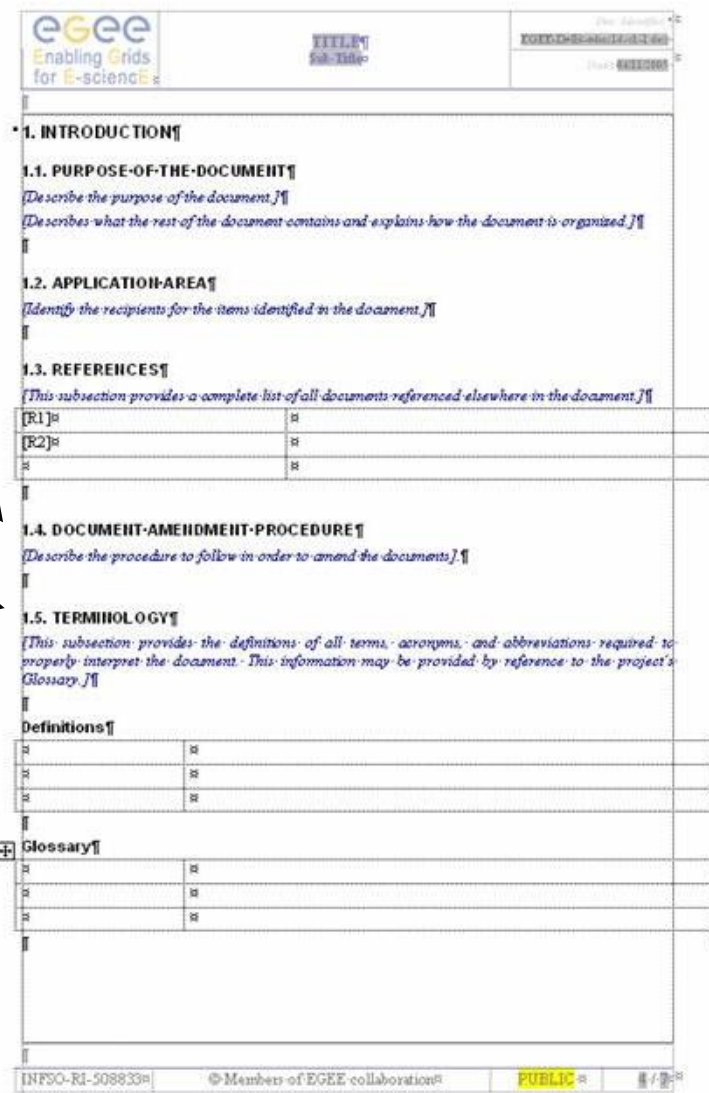
1.3. REFERENCES

1.4. DOCUMENT AMENDMENT PROCEDURE

1.5. TERMINOLOGY

Remove the blue ink

Look at an existing deliverable, as you can reuse most of the text



The screenshot shows a document template with the following structure:

- 1. INTRODUCTION**
- 1.1. PURPOSE-OF-THE-DOCUMENT**
[Describe the purpose of the document.]
[Describes what the rest of the document contains and explains how the document is organized.]
- 1.2. APPLICATION AREA**
[Identify the recipients for the items identified in the document.]
- 1.3. REFERENCES**
[This subsection provides a complete list of all documents referenced elsewhere in the document.]
Table with columns for reference ID and title.
- 1.4. DOCUMENT-AMENDMENT-PROCEDURE**
[Describe the procedure to follow in order to amend the documents.]
- 1.5. TERMINOLOGY**
[This subsection provides the definitions of all terms, acronyms, and abbreviations required to properly interpret the document. This information may be provided by reference to the project's Glossary.]
Subsections: Definitions, Glossary.

Footer: INFSO-RI-508833 © Members of EGEE collaboration PUBLIC

- This is generally written last once the document is substantially complete
- It is typically 1-3 pages long
- It is generally written by the activity leader
- Probably the most important part of the deliverable



- **Chapter 3 - Real content**
- **This is the first part with real content**
- **For a long document, it usually contains a description of the document**
- **It may contain pointers and links to other parts of the document**
- **It may contain notes for intended audiences of the document**
- **Chapter 4+**
- **At last we get to something which has real content**
- **Most deliverables have about 4-6 of these chapters**
- **Final chapter often has conclusions or recommendations**
- **Appendices**
- **These are things which are important in the document but are better out of the way**
- **Sometimes, appendices may be a spreadsheet, project file or visio file**
- **If appending a large non word document, use the pdf writer to bind**

- Use alt-A, F9 to bring all document fields up to date
- Use the spelling checker
- Close the revision history
- Give the document a suitable name which accords with the revision history
- Print the document to acrobat or image writer
- Preview the document in acrobat or image writer
- Put both the word document and the pdf into the EDMS folder

Some editors write two short notes to add to the EDMS folder:

- announcement - 10 line e-mail text which says what it is and where it is located
- release notes - 10-20 line document which documents the contents of the EDMS folder

Finally

- Send an announcement to an appropriate place (eg PEB mailing list) to say that it is ready

Then

- It is time for a cup of tea!

- **Keep the document in 1 word file**
- **Keep the document as simple as possible**
- **Paste graphics as meta files**
- **Use documentation automation to maintain things like:**
 - Tables of contents/ figures/ tables
 - Footnotes
 - Cross references within the text
- **Make one person responsible for a document and have him/her edit it**
- **Pay attention to the file name, it contains important meta data**

Bad hygiene

- **Use of object linking and embedding**
- **Use of unusual features of Word such as:**
 - Forms
 - Index
 - Master documents
- **Redefining standard styles in Word such as 'normal'**

Use many of the tools which are embedded in Word for:

- **document automation**
- **spell checking (English (UK))**
- **change tracking**
- **document map**
- **style viewer**

Use external tools such as:

- **Adobe Acrobat, the pdf writer**
- **Microsoft image writer (similar to acrobat but quicker)**
- **Macromedia/ Adobe Homesite or Dreamweaver for link checking**
- **Other tools for creating documents such as:**
 - Microsoft Excel
 - Microsoft Project
 - Microsoft Visio
 - Microsoft Picture Editor
- **Adobe Acrobat for combining pdf files into one**

Names of files containing documents

The template will have a name such as:

- EGEE-DelId-edmsId-v2-5.doc

Change this to something like:

- EGEE-DSA1.6-701567-v0.0.doc

- DSA1.6 is the deliverable reference
- 710567 is the EDMS folder number
- v0.0 is a version number
- Whenever providing a copy of a document to someone else, change the version number
- Whenever providing a document for review, change the version number
- Keep the version number synchronized with the document log
- Following a round of review and moderation create a new EDMS version also

- **People who have already done this a few times**
- **Anna**
- **Alistair**
- **Gabriel**
- **The notes on the JRA2 web site**
- **Word experts!**

Instructions from the EGEE reviewers

- **Keep deliverables as short as possible**
- **Refer to other documents wherever possible**
- **Avoid repetition from other documents**
- **Make it possible to read the document without using the links**
- **Say what is at the end of a link**

Questions and Answers

- I do not like Word. Can I use Open Office? • No
- I do not like Word. Can I use Latex? • No
- I do not like Windows. Can I use Linux? • No
- I do not like EDMS. Can I use something else? • No
- I do not like the template. Can I invent my own? • No
- Can I include a spreadsheet? • Yes - pdf
- Can I include Project documents? • Yes - pdf
- Can I include PowerPoint slides? • Yes - Pdf
- Can I include database reports? • Yes - Pdf

That's all folks