

XML Update

and

Introduction to the MS Word template for IEEE standards drafts

Lisa Perry

IEEE-SA Content Production
and Management

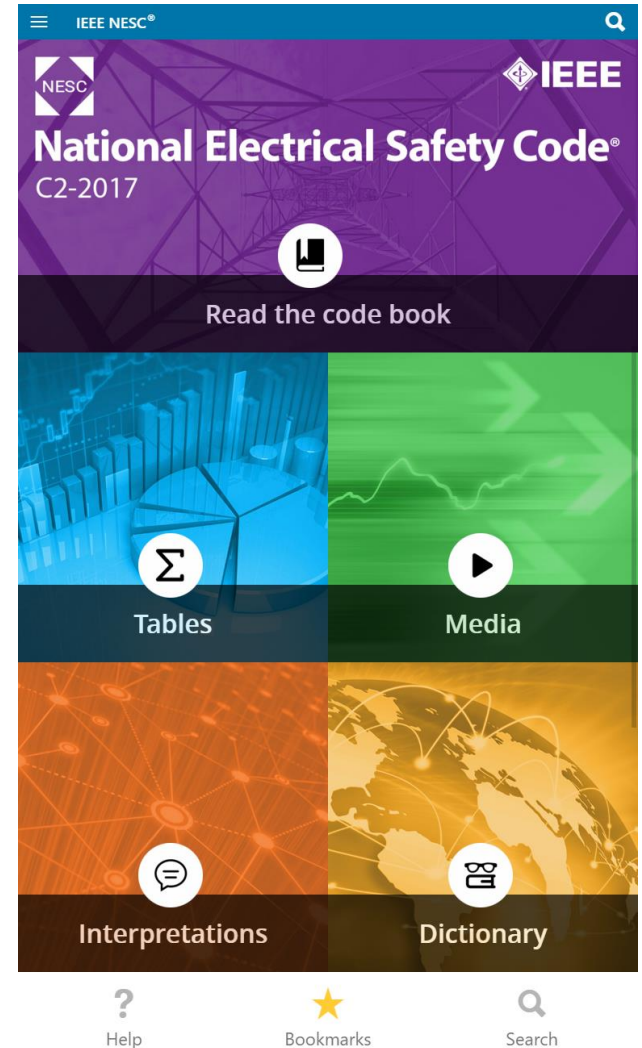
Topics

- XML Update
- Introduction to the MS Word template for IEEE standards drafts
 - What is the template?
 - Why use the template?
 - How do I access...
 - the template?
 - IEEE-SA training videos?
- Key features of the Template
- Initial Steps for Working in the Template: New vs. Revision
- Tips and tricks

XML Update

Where are we now?

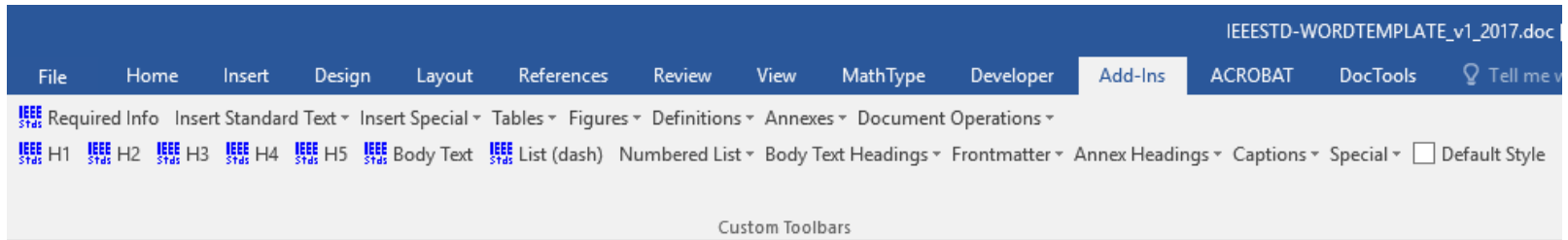
- SA Next-Gen Publishing project
 - Implementation 2016
 - In-house generated XML delivered to Xplore
- XML-derived products
 - HTML
 - Mobile apps
- Possible future mobile apps
 - 1584 Arc Flash standard
 - DASC standards
- Ideas for new products?



Introduction to the MS Word template for IEEE standards drafts

What is the Word Template?

- Word document with custom toolbars that run macros
- A **macro** is a series of commands and instructions grouped together as a single command to accomplish a task automatically.



Why Use the Word Template?

- Using macros saves time
- Includes basic structure and formatting
- Updated along with updates to IEEE Standards Style Manual
- Easier to maintain the standard with roundtrip document

P<designation>/D<draft_number>, <draft_month> <draft_year>¶
Draft<opt_Trial-Use><Gde./Rec./Prac./Std.> for <Complete-Title-Matching-PAR>¶

```
1 P<designation>™/D<draft_number>
2 Draft<opt_Trial-Use><Gde./Rec.
3 Prac./Std.> for <Complete-Title
4 Matching-PAR>¶
5 Sponsor¶
6 ¶
7 <Committee-Name>¶
8 of the¶
9 IEEE <Society-Name>¶
10 ¶
11 ¶
12 Approved <Date-Approved>¶
13 ¶
14 IEEE-SA Standards Board¶
15 ¶
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How Do I Access... the Word Template?

<https://standards.ieee.org/develop/stdswritten.html>

Link to download
zip file of
template and
resources

IEEE STANDARDS ASSOCIATION Contact FAQs standards.ieee.org only GO

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DEVELOPING STANDARDS

- What are Standards?
- What are our Guidelines?
- Who Oversees the Process?
- How are Standards Made?

INITIATING THE PROJECT

- How Projects are Started
- Types & Nature of Projects
- How to Find a Sponsor
- Submitting A Project Request

MOBILIZING THE WORKING GROUP

- What is a Working Group?
- Who can Participate?
- How to Form a Working Group
- How are Working Groups Governed?
- Managing the Working Group

DRAFTING THE STANDARD

- How are Standards Written?**
- The Standards Preparation & Editing Process
- Getting Help: Professional Services

BALLOTING THE STANDARD

- The Balloting Process
- Casting Your Ballot

HOW ARE STANDARDS WRITTEN?

The first milestone for many Working Groups is finishing their first complete draft. One of the ways to start is to break the document down into segments or sections. First, a scope and purpose statement is prepared based on the PAR information. The scope and purpose statement is kept in mind at all times, since this will be what the IEEE-SA Standards Board will be evaluating the document against.

Next, an outline is created. Often, this outline will also serve as the structure for the standard as well. The subjects in the outline will become the clauses and subclauses in the document. This outline should be thoroughly reviewed against source materials and Working Group ideas to ensure that it is conclusive. Then the Working Group should work to fill in the outline. Often, this is done by splitting up the work among Working Group members. It's advisable not to actually write the document at meetings. Assign writing tasks, then use the meeting to resolve problematic areas, treating the meetings almost as a plenary session. The technical editor will then compile this work into one document.

One of the challenges in splitting up the work is the potential for inconsistency of tone in the document as a result. One way to avoid this problem is to remember to use standard verbs (shall, should, and may) as the primary means of conveying the tone of your document. Standards primarily use "shall," recommended practices primarily use "should," and guides primarily use "may". Remember, however, that this is not an exclusive definition. Standards can use "may" every once in a while, just as guides can use "shall". Indeed, this kind of use is almost inevitable. What needs to be attained is an overall consistency of tone. The overall tone is mandatory, so consistency in the use of verbs, and the use of proper standards verbs, can help to achieve an even tone in the document.

Another helpful tool is to discuss as a group how the group is going to explain the information contained in your standard. Should you use descriptions? Enumerated lists? Examples? A combination of these? Should each subject be addressed in a certain manner — first point A, then point B, then point C (when A, B, and C could serve as potential subclauses)? If the Working Group lays out some ground rules to cover

RELATED LINKS

- [IEEE-SA Standards Mandatory Editorial Coordination \(MEC\) Form](#)
- [IEEE-SA Standards Style Manual](#)
- [IEEE-SA Standards Framemaker Template \(.zip\)](#)
- [Standards Microsoft Word Template \(PC ONLY - Word '03, '07, '10 as .doc\) \(.zip\)](#)**
- [IEEE-SA Standards Copyright Permission Request Letter Template \(.zip\)](#)
- [IEEE-SA Copyright Policy](#)
- [Copyright FAQs](#)
- [Draft Review Checklist](#)
- [How to Create a PDF with Embedded Fonts](#)

WRITING YOUR IEEE STANDARD

- [Video #1 Getting Started with the Template](#)
- [Video #2 Composing Your Draft in the Template](#)
- [Video #3 Adding Figures & Tables in the Template](#)
- [Video #4 Adding Annexes, Creating a Bibliography, and Inserting Cross-References in the Microsoft Template](#)

How Do I Access... IEEE-SA training videos?

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WRITING YOUR IEEE STANDARD

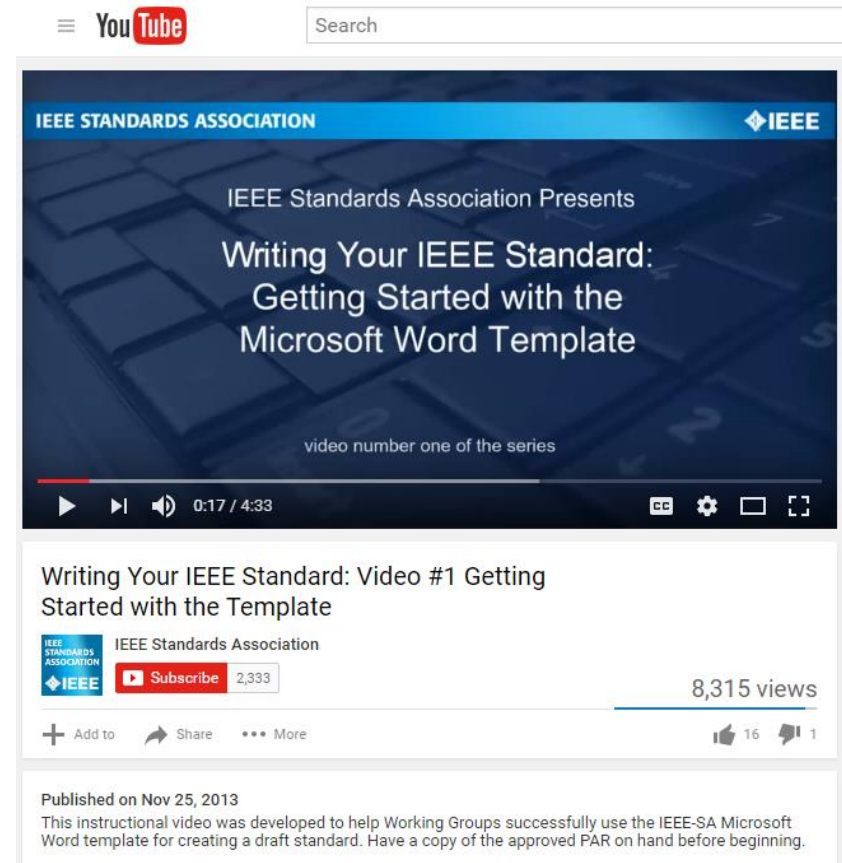
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- [Video #3 Adding Figures & Tables in the Template](#)
- [Video #4 Adding Annexes, Creating a Bibliography, and Inserting Cross-References in the Microsoft Template](#)

Links to how-to
videos on
YouTube

How Do I Access... IEEE-SA training videos?

<https://www.youtube.com/IEEESA>

- Video #1: [Getting Started with the Template](#) (for new standards)
- Video #2: [Composing Your Draft in the Template](#) (for new standards)
- Video #3: [Adding Figures and Tables in the Template](#)
- Video #4: [Adding Annexes, Creating a Bibliography, and Inserting Cross-References in the Template](#)

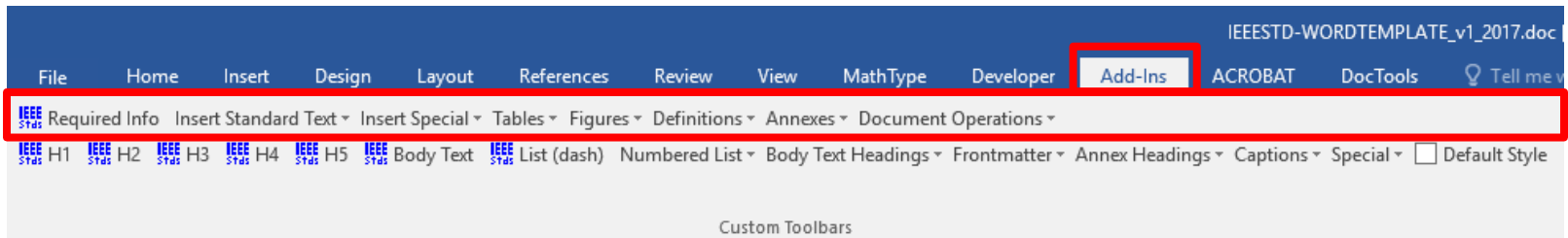


The screenshot shows a YouTube video player interface. At the top, there is a search bar and the YouTube logo. The video player itself has a dark blue background with the IEEE Standards Association logo and the text 'IEEE Standards Association Presents Writing Your IEEE Standard: Getting Started with the Microsoft Word Template'. Below the video player, the title 'Writing Your IEEE Standard: Video #1 Getting Started with the Template' is displayed. The channel name 'IEEE Standards Association' is shown with a 'Subscribe' button and '2,333' subscribers. The view count is '8,315 views'. There are also buttons for 'Add to', 'Share', and 'More'. The video was published on Nov 25, 2013. A description below the video states: 'This instructional video was developed to help Working Groups successfully use the IEEE-SA Microsoft Word template for creating a draft standard. Have a copy of the approved PAR on hand before beginning.'

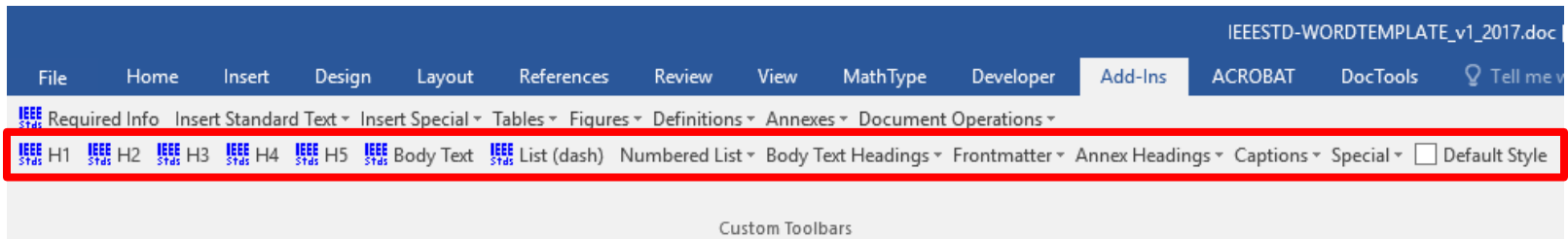
Key Features of the Template

Add-Ins tab > Custom Toolbars

- **Template** toolbar **inserts elements** of an IEEE draft standard



- **Formatting** toolbar **applies styles** to existing text in an IEEE draft standard



Required Information

- Draft labeling, title, names of Society, Sponsor and WG, etc.
- Window appears after first time opening the template, can then access on the template toolbar
- Macro uses text entered to auto-populate fields within the template
 - Tip #1:** Click OK after entering text for each tab
 - Tip #2:** Type in text; do not copy and paste

Required Information

Designation and Draft | Title | Revision/Amendment/Corrigendum | Committees | Working Group

IEEE Standards Project Designation and Draft Number
Get or check the correct Project Designation and Draft Number
using the PAR Approval History

IEEE P Draft

Month and year of development for this draft version

Month Year

Auto-Numbering

- Clause and subclause headings*
- Figures*
- Tables*
- Equations
- Bibliographic references

*Separate macro buttons for applying these styles in the main body vs. an annex

Other features

- Equation number can be added when inserting an equation
- Landscape table can be added
- Definitions can be sorted
- Insert annex
- TOC (insert and update) (WORD)
- Cross references (WORD)

Initial Steps—New vs. Revision

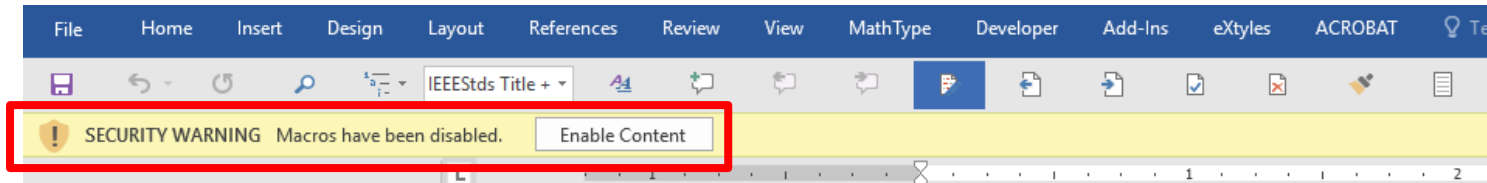
Initial Steps

- For new standards
 - Download the latest version of the template
 - Add info from approved PAR to **Required Information**
- For revision standards, same steps as for new PLUS
 - Copy text from the “roundtrip” document
 - Paste in the template

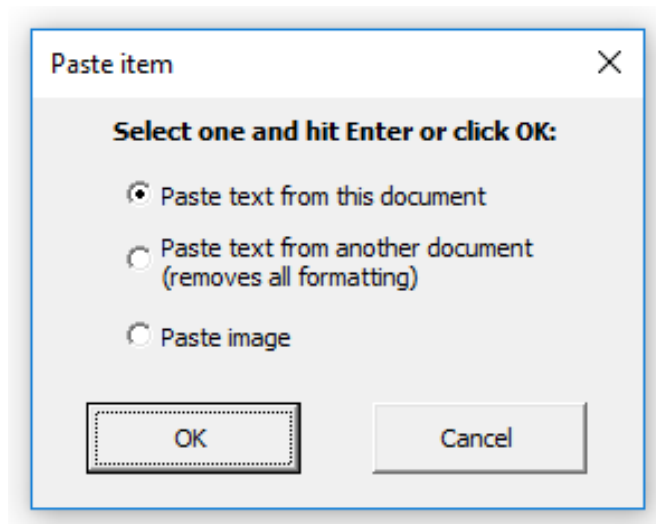
Tips and Tricks

MS Word Tips and Tricks

- Must enable macros in Word

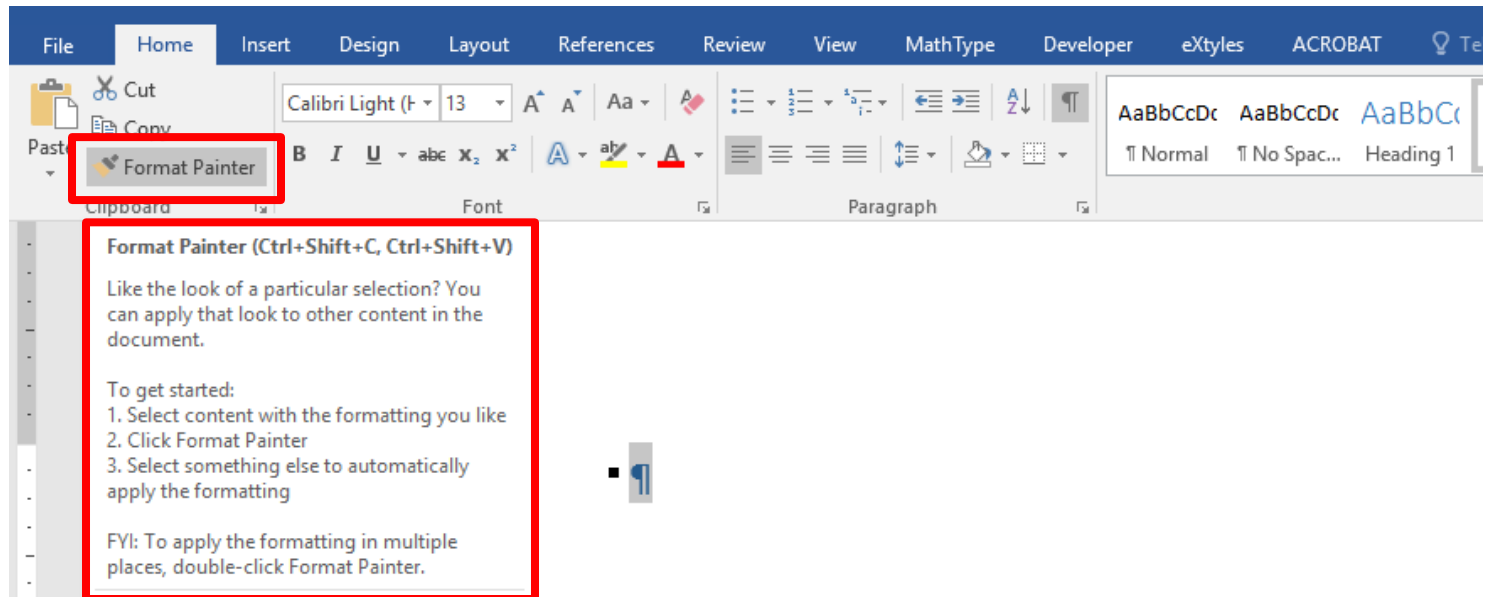


- Paste special (Ctrl + V)



MS Word Tips and Tricks

- Home tab > Format painter button



IEEE-SA Staff Support

- Don't spend time trouble shooting!
- If something isn't working, send Word template and description of issues via email to

sa_templates@ieee.org

My Contact Information

Lisa Perry

IEEE

445 Hoes Lane

Piscataway, NJ 08854

T: 732-562-3942

l.perry@ieee.org

www.standards.ieee.org