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1. Introduction

It is recommended that documents and templates created as Solution Integration Process (SIP) process assets adhere to specified documentation guidelines to achieve a common "look and feel" across the body of process assets. Those guidelines are contained within this document as recommendations for document authors.

For documents/templates produced using MS WORD, the owner should start with one of the following skeletons that already contain the recommended formatting (each followed by its Master List ID Number (MLID#)):

- SIP Controlled Document Template Skeleton (MLID# 25213)
- SIP Quality Record Template Skeleton (MLID# 25217)
- SIP Sub-Process Description Skeleton (MLID# 25220)
- SIP Procedure Description Skeleton (MLID# 25221)

For Quality Record templates produced using MS Excel, the owner should start with the following:

- SIP Excel Quality Record Template Skeleton (MLID# 25735)

Examples of the various WORD "styles" used in SIP process assets, plus examples of recommended wording, can be found in the ***SIP Job Aid for Documentation Standard Elements*** (MLID# 25212).

NOTE: Refer to ***SIP Training Course Material Standards Procedure Description*** (MLID# 25351) and the associated SIP Training Course Material Standard Template (MLID# 25352) for standards/conventions related to SIP training course materials that are produced using MS PowerPoint.

2. Terminology

Within this document, each acronym is spelled out at its first occurrence, followed by the acronym in parenthesis. A complete glossary can be found in ***NTD Acronyms and Definitions*** (MLID# 10762).

3. Documentation Conventions

NOTE: See Appendix 1 for a comprehensive listing of all style formatting information.

3.1 Basic Inclusions

1) Each document that refers to other document(s) and/or template(s) should have a reference section that includes a table of all documents/templates that are referenced within the body of the document. Put MLID# in first column and title in 2nd column; sort by MLID#. For templates that are used to produce documents that may refer to other document(s)/template(s), include the reference section as a placeholder in the user section.
2) The first page should be consistently formatted, using a table for the document attribute information:
    a) AT&T logo (8-line globe as found on the first page of this document) right-justified in upper right corner using Normal style (size .6" x 1.2").
    b) Blank line in upper left using Document Label style (to produce a horizontal line beneath the logo). NOTE: We no longer use the label "Network Technology Development".
    c) Title, MLID# and Version# in upper left using Doc Info style with appropriate labels using Label style.
    d) Issue Date and Effective Date (in dd MMM yyyy format – e.g., 03 Jan 2001) and owner/author info (name, handle@att.com) in upper right using Doc Info style with appropriate labels using Label style. If the owner/author is a team (Functional Owner), the email address may be formatted as team-id@ems.att.com.
3) Use 3-column table in footer, with horizontal border across top. Use Footer style, with 1st column left-justified, 2nd column centered and 3rd column right-justified.
    a) For a controlled document: MLID# & Version# in left column; proprietary marking in center (first line bold, all caps, no spaces; second line italicized with only first/fourth words capitalized); Page x of y in right column.
    b) For a controlled template that is serving as a form (no cover page – this is a rare occurrence): Issue/Effective Dates in left column, proprietary marking in center; MLID#, Version# and Page x of y in right column.

4) Include a statement about spelling out each acronym at its first occurrence, with the acronym following in parenthesis. Exceptions include Q-Gates and acronyms/abbreviations that are denoted as only applying to a particular table or figure within a given document (as long as they are not used within the general text of the document). Refer to ***NTD Acronyms and Definitions*** (MLID# 10762). If you introduce new acronyms/terms that are not currently in MLID# 10762, you should coordinate a reissue of that document at the same time as your document to include the new acronyms/terms. Avoid introducing new meanings for existing acronyms. NOTE: If a particular document does not refer to MLID# 10762, a glossary (list of acronyms and their meanings) should be included in the document to list all acronyms that are used.

5) In general, include a Table of Contents (TOC) in documents (and in user section of document templates). Use consistent format for TOCs. Be sure to update the TOC before saving the document.

6) Include a Change History table (Version, Issue/Effective Dates, Reason for Re-Issue) and Log of Changes – place at the back of the document (before appendices/attachments).

7) Update “Properties” of each file. Use full title as the Title, “MLID# nnnnn” as the Subject, Author name (may be a group name), “AT&T” as Company (leave Manager blank).

8) Avoid using a “header”, except possibly for the title of a controlled template that is serving as a form.

9) Avoid including information about submitting MRs for changes to a given document – that information should only be in the ***Solution Integration Process (SIP) Description*** (MLID# 8431).

10) Use full names for individuals who are mentioned in the Acknowledgments section.

11) For appendices/attachments, include a heading in addition to the Appendix/Attachment number – something to denote what the appendix is about, that will show up in the Table of Contents.

3.2 Formatting

1) Use standard margin sizes in all documents: 1” for top, bottom, left, right; .5” for header/footer.

2) Use consistent font size/type across all documents.

3) In general, keep all headings and regular paragraphs on the left margin – avoid successive levels of indentation unless there are more than three levels of headings.

4) Left-justify all text (as opposed to justified right margin).

5) Use automatic numbering rather than hard-coding numbers on headings, captions, numbered lists and page numbers.

6) Use consistent typographical conventions across all process/procedure documents:

    a) <u>Underline</u> for templates.

    b) ***Bold Italics*** for documents (including guidelines and job aids, even if controlled as templates).

    c) *Italics* for Inputs/Outputs.

    d) **Bold Face** for a role that is performing an action (in process documents).

7) Start each new appendix/attachment on a new page.

8) Use “keep with next” paragraph formatting on all section headings, table headings, captions and lead-in paragraphs that introduce a section, list, table or figure.

9) Avoid using manually inserted tab marks or page breaks. Indentation, justification, page breaking and spacing should be controlled by paragraph formatting. Columnar formatting should be done through the use of tables.

10) Be consistent in whether or not you hyperlink Uniform Resource Locators (URLs) that are mentioned in the text of the document.
11) In general, avoid including any empty paragraphs (except after a table that appears at the end of the document or after the TOC) – use paragraph formatting for "space before" and "space after" to control white space between paragraphs. You defeat the purpose of "keep with next" on headings, lead-in paragraphs, etc., if you interject empty paragraphs before the ensuing information.

3.3 Lists

1) Avoid embedding numbered items in a paragraph – place them after the paragraph in a numbered list.
2) Indent bullet and number lists.
3) Use numbers/letters rather than bullets on lists longer than 5 items.
4) Use automatic numbering/lettering rather than hard-coding numbers/letters on the list items.
5) Start each list item with a capital letter.
6) Use the same punctuation at the end of each list item – either a period or no punctuation. Avoid use of commas or semicolons at the end of the list items and “and” or “or” at the end of the next-to-last item.

3.4 Tables

1) Use same “auto-format” for all tables (“Grid 5” with 1½-point borders surrounding table and under heading row, ½-point borders between rows and columns).
2) If you include a numbered caption for any table in a document, then you should do so for all tables in the document (Change History table is an exception).
3) Identify heading row(s) so they repeat on page break. Avoid use of shading in heading rows.
4) Use Table Heading style for the heading row(s). Use Table Entry style for the other rows.
5) In general: Justify the column heading the same way the cells in that column are justified.
6) Set Row Height to “auto”. Use .1” between columns.
7) Avoid allowing rows to break across pages.
8) Avoid inclusion of blank lines in a table unless it is intended for user entry. Use three blank rows for empty user entry tables.
9) Center tables that don’t span the entire width of the page.
10) If a table has more than 5 rows, it is recommended that a column for Row Number be included for easy identification of the rows (the heading row(s) would not be numbered). Use automatic numbering rather than hard-coding the row numbers.

3.5 Grammar/Spelling/Case

1) Spelling/case conventions:
    a) Use “reviewers/approvers” rather than “reviewers-approvers”.
    b) Use “subprocess” rather than “sub-process“ (except in titles of subprocess documents).
    c) Use “noncompliance” rather than “non-compliance”.
    d) Use “ensure” rather than “insure”.
    e) Use “process associate” rather than “Process Associate”.
2) Use initial capital letters on the following terms:
    a) “Q-Gate“
    b) “Quality Record“
    c) “System Team”
    d) “Senior Management”
    e) “Local Procedure”
    f) All functional roles and work product names
    g) First word following a colon (e.g., after “Note:” or “Instructions:”).
3) Use parenthesis around explanatory phrases: (i.e., …) or (e.g., …).
4) Change all “ - " to “ – “ (use long “en” dash instead of hyphen) when separating phrases of a sentence.
5) Use 4-digit years for all dates.
6) Use of spaces:
    a) Use one space between sentences (and after colons) rather than two.
    b) Replace all multiple spaces between words with a single space.
    c) Remove spaces before or after paragraph marks or after data in a table cell.
    d) Avoid use of spaces before or after slashes that separate words in regular text.
7) Use of commas:
    a) Use a comma after “i.e.” and “e.g.”.
    b) In a list of 3 or more items, avoid using a comma after the next-to-last item. That is, say "A, B and C" rather than "A, B, and C"; say "x, y or z" rather than "x, y, or z".

3.6 Terminology

1) Avoid use of the word “project”. Instead, use “system”, “System Team”, “release”. “solution” or “feature” as appropriate.
2) Avoid use of the terms “baselined” or “managed and controlled” (or anything else that’s CMM-specific).
3) Avoid using the word “document” just because something is written as a “document” in WORD. The word “document” should only be used for controlled documents, to differentiate from controlled data and Quality Records. Use “Quality Record” or “work product” as appropriate.
4) The word “review” should only be used to refer to formal review/approval per the ***SIP Review/Approval Procedure Description*** (MLID# 25425).

5) The word “role” should only to be used to refer to official NTD functional roles (or accepted aliases) as defined in ***NTD Functional Roles and Responsibilities*** (MLID# 483). Use “capacity” for specialized functions/activities within a given procedure.

6) Align with the latest release of SIP – be sure to use the same names for work products (documents/data and Quality Records) as are used in the SIP subprocess descriptions.

3.7 Templates

1) Document or Quality Record (QR) templates should have a cover page that is removed when the actual document or QR is produced using the template. The cover page contains the control information for the template (including Change History and Log of Changes) and also states whether the template is optional, required or required content/optional format.

2) Precede instructional text (normal font) with “**Instructions:**”. Enclose the instructional text in square brackets. The cover page should direct that the instructional text be removed when completing the template.

3) Avoid including process/procedure information within a template. Instructions on how to fill it out are acceptable.

3.8 Linkage/Consistency

1) All documents/templates should be referenced from within another document (except the policy document, since it's at the top of the "hierarchy").

2) Use consistent “official” names for items (work products including Quality Records and various types of controlled documents/data) that are mentioned within or across documents.

3) Roles and responsibilities:

    a) Process/procedure documents should contain a list of all NTD functional roles that actively participate in the process/procedure. “Active” participation means that the role takes some action or is involved in producing an output – it does not include merely receiving or reviewing an output. Refer to ***NTD Functional Roles and Responsibilities*** (MLID# 483) as appropriate.

    b) Procedure documents may also contain a list of capacities in which any process associate may act during the course of the procedure. A brief description should be given for each of the capacities.

    c) Descriptions of functional roles and/or capacities (in the Roles and Responsibilities section of a process/procedure document) are not to include procedural information – the actual activities to be done by the person acting in that role/capacity belong in the process/procedure description section of the document.

4) Inputs and outputs:

    a) Process/procedure documents should contain a list of inputs used in the process/procedure and a list of outputs (e.g., work products such as controlled documents/data and QRs). Note that other process/procedure documents/templates are not generally considered to be inputs.

    b) In process/procedure documents, be sure that all inputs/outputs listed are actually used/produced within the process/procedure functions/steps. For each output, a function/procedure step should describe who creates/stores it, when it is to be done, whether it needs to be reviewed (if so, a minimum set of reviewers is listed, by functional role), etc.

    c) Anything mentioned as an input to one process should be mentioned as an output from another.

d) Be sure that all inputs and references mentioned in process/procedure documents are under control in ODMS.

5) Process/procedure documents should describe the list of activities/functions performed by each role or capacity.

6) Templates:

   a) For templates that don't include instructions on filling out various sections (e.g., a form), there should be a job aid or information included in a process/procedure document that provides the instructions.

   b) Wording in referring text should indicate whether a template is required format and content, totally optional or required content/optional format.

7) In controlled documents, spell out all acronyms on the first occurrence, followed by the acronym in parenthesis.

8) Document titles:

   a) Process titles should end in "Process Description" or "Sub-Process Description".

   b) Procedure titles should end in "Procedure Description".

   c) In general, avoid using acronyms in parenthesis at the end of document titles [e.g., (CIO-EP)]. If a shorthand version of the document title is necessary for ease in referring to it multiple times within a given document, establish it the first time you refer to it from another document.

9) All references to other documents/templates should have the title followed by the MLID# in parenthesis (plain text) as follows:

   a) ***Document Title*** (MLID# nnnnn)

   b) <u>Template Title</u> (MLID# nnnnn)

10) Change History should include the relevant MR number as the REASON for reissue. The Log of Changes should identify where in the document the changes were made and what those changes were.

11) All URLs should be accurate, with displayed URLs matching the underlying hyperlink.

12) Any locations mentioned (URL or directory path/file name on a local server) should go directly to the desired information. If the location is a higher-level directory that contains multiple links or files/sub-directories, it should be explicitly clear to all readers how to navigate to the desired information.

13) Avoid using page numbers when referring to material within a document – pagination may vary for different users depending on their printer settings. Refer instead to section numbers.

14) Any reference to another section within a document should be done using automatic cross-referencing to the section number and/or section heading text – avoid hard-coding section numbers or headings in the referring text.

3.9 Other Considerations

1) Special considerations while a document is in draft mode:
   a) Include a draft marking following the version # as follows:
      - a.b DRAFT # (initials of author mm/dd/yyyy)
      - 1.0 DRAFT 3 (JME 06/06/2002)
   b) The Version number should be that of the next controlled version (not the draft number).
   c) It is acceptable for the Issue/Effective Dates to be indicated as "TBD" on draft versions if you don't know the target date. Avoid using these fields to indicate the date of the draft.
   d) Keep the draft marking until the document is approved, at which time the Issue/Effective Dates are finalized to align with the document approval date.
2) When making ***content*** changes, turn on change tracking and/or highlight changed text to make it easier for the reviewers to identify changes.
3) All changes should be accepted and highlighting removed when the document is approved and submitted for control.
4) Drafts for coordinated releases of SIP documentation should be stored on a web server for online access.
5) In general: Avoid sending documents via email attachment – use web links instead.

3.10 Reducing File Size of Process Assets

The following techniques are recommended to reduce the file size of SIP Process Assets that are produced in MS WORD:

1) Use the AT&T globe logo that is found on the first page of this document.
2) On the WORD menu, under Tools…Options…Save:
   a) Check "Embed TrueType fonts" and "Embed characters in use only".
   b) Un-check "Allow fast saves".
3) Change pictures (e.g., the globe logo) to graphics by clicking on the picture, then pressing <Ctrl>+<Shift>+<F9>.

4. Acknowledgments

The document owner thanks all contributors for their support in preparing this document.

5. References

5.1 Templates

MLID#	Template Title
25213	SIP Controlled Document Template Skeleton
25217	SIP Quality Record Template Skeleton
25220	SIP Sub-Process Description Skeleton
25221	SIP Procedure Description Skeleton
25352	SIP Training Course Material Standard Template
25735	SIP Excel Quality Record Template Skeleton

5.2 Local Procedures

Refer to the **Index of SIP Local Procedures** (via the SIP Home Page) for a complete list of Local Procedures that augment SIP process or procedure descriptions.

5.3 Other References

MLID#	Document Title
483	***NTD Functional Roles and Responsibilities***
8431	***Solution Integration Process (SIP) Description***
10762	***NTD Acronyms and Definitions***
25212	***SIP Job Aid for Documentation Standard Elements***
25351	***SIP Training Course Material Standards Procedure Description***
25425	***SIP Review/Approval Procedure Description***

6. Change History

Version	Issue Date	Effective Date	Reason for Re-Issue
1.0	27 Jun 2002	27 Jun 2002	Initial issue to address SIP MR# 152

7. Log of Changes

Does not apply for initial issue.

APPENDIX 1 – STYLES

The following styles are recommended for use in SIP process asset documentation. All paragraph styles are single-spaced, Arial font, with "Widow-Orphan Control" and "Keep Lines Together". Additional formatting is covered in the table below.

Style Name	Font Size	Bold?	Indent	Hanging Indent	Space Before	Space After	Justifi-cation	Keep w/Next?	Next Paragraph	Based On	Special Instructions
Body Text	10				6	6	L		Same	Normal	
Body Text Indent	10		.5"		6	6	L		Same	Normal	
Body Text Lead-In	10				6	6	L	Y	List Bullet	Body Text	
Caption	10	Y			6	6	C	Y	Normal	Normal	
Doc Info	10	Y			6	6	L		Same	Normal	Top border ¾ point width, 1 point above line
Document Label	10					12	L		Same	Normal	
Footer	8						L/C/R		Same	Normal	
Footnote Reference	10									Def Para Font	Super-script
Footnote Text	9			.1"		3	L		Same	Normal	
Header	10						L/C/R		Same	Normal	
Heading 1	12	Y		.5"	12	6	L	Y	Body Text	Normal	Outline numbered Level 1 (1.)
Heading 2	12	Y		.5"	12	6	L	Y	Body Text	Heading 1	Outline numbered Level 2 (1.1)
Heading 3	11	Y		.5"	12	3	L	Y	Body Text	Heading 1	Outline numbered Level 3 (1.1.1)
Heading 4	10	Y	.25"	.5"	6	3	L	Y	Body Text Indent	Heading 1	Outline numbered Level 4 (1.1.1.1)
Label	10				3	3	L		Same	Doc Info	

Style Name	Font Size	Bold?	Indent	Hanging Indent	Space Before	Space After	Justifi-cation	Keep w/Next?	Next Paragraph	Based On	Special Instructions
List Bullet	10		.25”	.25”		6	L		Same	Normal	Bullet
List Bullet 2	10		.5”	.25”		6	L		List Bullet 2	List Bullet	En Dash
List Bullet Lead-In	10		.25”	.25”		6	L	Y	List Bullet 2	List Bullet	Bullet
List Number	10		.25”	.25”		6	L		Same	Normal	Numbered as 1), 2), ,,,
List Number 2	10		.5”	.25”		6	L		List Number 2	List Number	Numbered as a), b), …
List Number Lead-In	10		.25”	.25”		6	L	Y	List Number 2	List Number	Numbered as 1), 2), …
Normal	10						L		Normal		
Step Number	10			.25”		6	L		Same	Normal	Outline numbered as 1., 2., …
Step Number 2	10		.25”	.25”		6	L		Same	Step Number	Outline numbered as a), b), …
Step Number 3	10		.5”	.25”		3	L		Same	Step Number 2	Outline numbered as i), ii), …
Table Entry	10					3	3	L	Same	Normal	
Table Heading	10	Y				3	3	L	Same	Normal	
Title	12	Y				12	6	C	Body Text	Normal	
TOC 1-9	10							L		Normal	Each level indented .14” from previous level