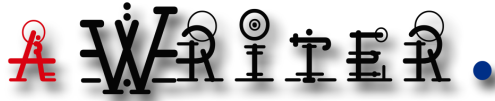


## **A Document Formatting Guide**

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February 2017



## A Document Formatting Guide

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# A Document Formatting Guide

ST1001	1.1
<i>Number</i>	<i>Version</i>
Effective Date: 02/2017	

## 1 DOCUMENT LAYOUT

### 1.1 Margins

- Top: 1-inch
- Bottom: .5-inch
- Left: 1-inch
- Right: 1-inch

### 1.2 Headers and Footers

#### 1.2.1 Headers

Headers are .5-inch from top. Company name (A Writer.) should be on the upper left side of the header.

- **1<sup>st</sup> Page Header**

	AWP-1001	1.0
	<b>Number</b>	<b>Version</b>
<b>Effective Date: 02/2017</b>		
<b>SUBJECT: A Document Formatting Guide</b>		

- **Subsequent Page Header**

<b>A Document Formatting Guide</b>	AWP1001	1.0
	<i>Number</i>	<i>Version</i>
Effective Date: 02/2017		

The title of the document should be on the line below the Company name in Bold. If applicable, the effective date of the document can be placed directly below the document title.

#### 1.2.2 Footers

Footers are in 10- point Avenir LT Std 55 Roman and are .4-inch from the bottom.

**For example:**

---

Printed copies of this document may not be current.

Page 4 of 16

Page numbering should be inserted on the right side, given in the format Page X of Y, where “X” is the page number and “Y” is the total number of pages in the document.

---

Printed copies of this document may not be current.

Page 4 of 16

## 2 GENERAL DOCUMENT FORMATTING

### 2.1 Fonts

#### 2.1.1 Default Font

- The default font for A Writer Period documents is Georgia.
- The standard font size is 12 point.
- Different document types or sections within a document may require different fonts or font sizes.
- For instance, if an excerpt from a regulation is included in a document, another font could be used to differentiate it from the rest of the document.
- Different headings will have varying font sizes, as discussed in Section 7 - Heading Styles.

### 2.2 Fonts for Headings

#### 2.2.1.1 General

Headings 1-4 from the Styles menu should be used whenever possible. (See Section 7 - Heading Styles).

Heading 5 should only be used if another heading level is absolutely needed.

Heading 1 should be used for the highest level of section titles (Level 1).

Heading 2 should be used for subsections within those sections (Level 2).

Heading 3 should be used for subsections within a Heading 2 subsection (Level 3).

Heading 4 should be used for the next level down (Level 4).

#### 2.2.1.2 Headings for Documents with Section Numbering

If the document uses section numbering, Heading 1 should be used for headings with section numbers that are whole numbers (e.g., 1, 2, 3, etc.).

Heading 2 should be used for subsections of the Heading 1 sections, which would have section numbers with one decimal point (e.g., 1.1, 1.2, 1.3, etc.).

Heading 3 should be used for the next level of subsection, which would have section numbers with two decimal points (e.g., 1.1.1, 1.1.2, 1.1.3, etc.).

Heading 4 should be used for subsections at the next level down, which would have section numbers with three decimal points (e.g., 1.1.1.1, 1.1.1.2, 1.1.1.3, etc.).

It is preferable to avoid having more than four levels of headings.

However, Heading 5 may be used if necessary. Section numbers at this level would have

4 decimal points (e.g., 1.1.1.1.1, 1.1.1.1.2, 1.1.1.1.3, etc.).

To avoid these unwieldy longer numbers, it is also acceptable to use Heading 5 subsections without section numbers. Consistent formatting of Heading 5 should be used throughout the document.

### 2.2.1.3 Overall Document Title or Major Section Title

An overall title for a document can appear at the start of the document body. This should be in 14-point Georgia font in Bold and centered.

#### For example:

## **A Document Formatting Guide**

### **2.2.2 Bold Text for Emphasis**

Emphasis should be indicated by use of Bold text. Italics should be reserved for references to external documents (see below).

### **2.2.3 Italics for References**

Italics should be used when providing a reference to an external document. For example, API Recommended Practice 1170 (API RP 1170) would be referenced as *API RP 1170 – Design and Operation of Solution-mined Salt Caverns Used for Natural Gas Storage, First Edition, July 2015*. The italics would only be needed for giving the full reference. The document would still be referred to as “API RP 1170” (without italics) throughout the rest of the document.

### **2.2.4 Font for Hyperlinks**

Hyperlinks to external documents should be in blue font and should be underlined.

**For example:** [API RP 1170](#), sections 9, 10, and 11 are incorporated by reference into the new requirements (see § 192.7).

## **2.3 Line Spacing**

### **2.3.1 Line Spacing for Standard Text**

Line spacing for standard text within each section should be 1.08.

The spacing between paragraphs should be 0-point before and 8-point after.

### **2.3.2 Line Spacing for Headings**

Line spacing for heading styles is covered in Section 7- Heading Styles.

### 2.3.3 Line Spacing for Bulleted, Lettered & Numbered Lists

Lists in bulleted, lettered, or numbered form should use single spacing.

## 2.4 Text Alignment

Standard section text is justified.

The section headings are aligned left. This alignment is incorporated into the Heading Styles.

An unnumbered title at the start of a document that covers the entire document, or a major section of the document, may be centered, as discussed in Section 2.1.1.3. For example, before a table of contents, as shown below:

## A Writing & Style Guide

### Table of Contents

## 2.5 Formatting Between Pages

Headings should be formatted as “Keep with next” so that headings are not alone at the bottom of the page.

# 3 BULLETED, NUMBERED & LETTERED LISTS

## 3.1 Bulleted Lists

Using bullets for itemized lists is preferred over numbering or lettering, unless the list needs to be sequential or citable.

- Bullets should be the same font and size as the text, which should be 12-point Arial for most documents.
- The bullets should be aligned with the left edge of the text above the start of the bullets.
- The bullet item text should be at a .25-inch indent from the bullet.

As discussed in Section 2.2.3, single spacing should be used between bulleted items.

- First level bullets should be solid.
  - Second level bullets should be hollow and should align with the left edge of the text of the first level bullets with a .25-inch indent between the bullet and the text of the bullet item.
    - Third level bullets should be a solid square and should align with the left edge of the text of the second level bullets with a .25-inch indent between the bullet and the text of the bullet item.

## 3.2 Numbered Lists

Numbered lists can be used when necessary to present sequential steps in a process, as shown in the example below:

- 1) Step 1
- 2) Step 2
- 3) Step 3

a. Use letters for the next level, if needed.

The numbering should be aligned left, so that it is even with the left edge of the immediately preceding text, with a .25-inch indent between the number and the text of that item. Use single spacing between numbered and lettered items on the list.

The lettered items in the next level should be aligned with the text in the numbered step immediately above the lettered items, with a .25-inch indent between the letter and the text for that item.

## 3.3 Lettered Lists

A lettered list is another format that can be used when a citable, sequential format is required, as shown in the example below:

- A) First item. First level uses capital letters.
- B) Second item.
- C) Third item.

1. Use numbers for second level. a. Use lower case letters for third level. The letters for the first level of list items should be aligned left, so that they are even with the left edge of the immediately preceding text. A .25-inch indent should be used between the lettering and the text for each item.

The numbers for the second level of list items should be aligned so that they are even with the left edge of the text for the first level items, with a .25-inch indent between the number and the text for each item.

The letters for the third level of list items should be aligned so that they are even with the left edge of the text for the second level items, with a .25-inch indent between the letter and the text for each item.

## 4 TABLES

Tables should be aligned left with the immediately preceding text or centered, depending on the size. The right side should not extend past the right margin.

Text in tables should normally be Avenir LT Std 55 Roman, 10-point or 11-point. Other font sizes can be used more complex tables, but it is preferable to use the standard font sizes if possible. The text should be left justified and “wrap text” should be selected. In some cases, cell contents may be centered, if needed.



Table column titles should be in Georgia, using the same font size as the other table text, in Bold, black on a light red background, left justified, vertically centered, and wrap text.

If the table is broken across pages, the table column titles should be set to “Repeat Header Rows” so that they repeat at the top of the table on each page.

Table titles, if used, should be placed either below or above the table in 12-point Georgia font and should be in the format of “Table” (number) – table title, as shown below:

Company Shirt Size			
Name	Address	Phone Number	Shirt Size
D. Mathis	17802 Mound Road	888-123-4567	XL

Table 1 – Table Formatting Example

## 5 GRAPHICS AND FIGURES

Graphics should generally be aligned left, so that they are even with the left edge of the preceding text.

Figure titles should be Georgia 12-point in Bold and should be placed immediately below the figure and on the same page, as shown below:

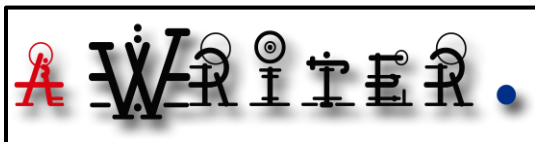


Figure 1 – A Writer. Logo

## 6 REFERENCES

As discussed in Section 2.1.4, references to external documents should be in italics.

The reference should be formatted as follows: Document type, space, document number – document title.

**Example:** *API RP 1170 – Design and Operation of Solution-mined Salt Caverns Used for Natural Gas Storage, First Edition, July 2015.*

## 7 HEADING STYLES

### 7.1 Heading 1

- Georgia 18-point, Bold, Kern at 16-point
- Line spacing: Single
- Before: 12-point

- After: 12-point, Keep with next, Level 1
- Tab stops: 0.5-inch, Left, Style: Linked, Show in the Styles gallery, Priority: 10
- Based on: Normal
- Following style: Normal

## 7.2 Heading 2

- Georgia 14-point, Bold, Underline, Kern at 16-point
- Left Indent: 0-inches
- Hanging Indent: .5-inch
- Line spacing: Single
- Before: 12-point
- After: 12-point, Keep with next, Level 2
- Tab stops: 0.5-inch, List tab, Style: Linked, Hide until used, Show in the Styles gallery, Priority: 10
- Based on: Normal
- Following style: Normal

## 7.3 Heading 3

- Georgia 14-point, Bold, Kern at 16-point
- Left Indent: 0-inches
- Hanging Indent: 0.5-inch
- Line Spacing: Single
- Before: 12-point
- After: 12-point, Keep with next, Level 3
- Tab stops: 0.5-inch, List tab, Style: Linked, Hide until used, Show in the Styles gallery, Priority: 10
- Based on: Normal
- Following style: Normal

## 7.4 Heading 4

- Georgia 12-point, Italic, Underline, Level 4, Style: Linked, Hide until used, Show in the Styles gallery, Priority: 10
- Left Indent: 0-inches
- Hanging Indent: 0.5-inch

- Line Spacing: Single
- Before: 12-point
- After: 12-point, Keep with next, Level 4
- Tab stops: 0.5-inch, List tab, Style: Linked, Hide until used, Show in the Styles gallery, Priority: 10
- Based on: Normal
- Following style: Normal

## 7.5 Heading 5

- Georgia 12-point, Font color: Red, Accent 1
- Before: 2-point
- After: 0-point, Keep with next, Keep lines together, Level 5, Style: Linked, Hide until used, Show in the Styles gallery, Priority: 10
- Based on: Normal
- Following style: Normal

## 8 TITLE PAGE

On the title page, A Writer. logo should be centered 1/3 down from top of page. The document title should be in 20-point Georgia in Bold below logo. Skip a line before indicating edition or revision number. Skip another line before giving the document date. The header and page number should not appear on the title page.

## 9 TABLE OF CONTENTS

The table of contents should appear at the start of the document, right after the title page. Use the automatic Table of Contents command to build a table of contents field based on the Heading Styles used throughout the document.

## 10 GENERAL STYLE PREFERENCES

### 10.1 Space Between

Sentences Use one space after a period between sentences.

### 10.2 Punctuation Preferences

#### 10.2.1 Punctuation in Bulleted Lists

##### 10.2.1.1 No Punctuation Needed at End of Listed Items

Periods are not needed at the end of items listed in bullet points unless they are full

sentences.

### *10.2.1.2 Exception Where Commas Could be Used*

An exception may be made in a case where the listed items form part of a sentence that begins in the text preceding the list. In this case, it may be necessary to end each bulleted item with a comma and use “and” or “or” at the end of the item right before the last item in the list.

### **10.2.2 Oxford Comma**

The Oxford comma should be used when listing items in a sentence. This means that there should be a comma before “and” or “or” at the end of the list (i.e., “valves, seals, and related equipment”).

### **10.2.3 Commas in Numbers**

Commas should be used in numbers (i.e., “3,000” instead of “3000”).

## **10.3 Subscripts and Superscripts**

Subscripts and superscripts should not be used, except in a chemical name or formula.

## **10.4 Fractions**

Fractions should be in full case (i.e., “1/2” instead of “½”).

## **10.5 Measurements**

As much as possible, spell out “inches” or “inch” instead of using the symbol ” and spell out “feet” or “foot” instead of using ‘.

Charts with detailed specifications may necessitate an exception to this rule.

## **10.6 Definitions**

If there are terms that need to be defined, a Definitions section may be included at the beginning of the document.

## **10.7 Acronyms**

Acronyms should be defined the first time they occur in the document. The words should first be spelled out and capitalized, followed by the acronym in parentheses.

**For example:** Emergency Shutdown (ESD)

An Acronyms section can be included at the beginning of the document that defines all acronyms used. If there is a Definitions section, the Acronym definitions can be placed right after it.

## 10.8 Use of “Shall” and “Should”

The word “shall” is used for activities that are required by regulations. “Should” is used for recommended practices that are not regulatory requirements.

## 10.9 “Federal” and “State”

Do not capitalize “federal” or “state” unless used as part of the name of a regulatory agency or a rule being cited.

**For example:** “TRRC State Wide Rule 97” or “Federal Energy Regulatory Commission (FERC).”

## 10.10 Use of Section Symbol

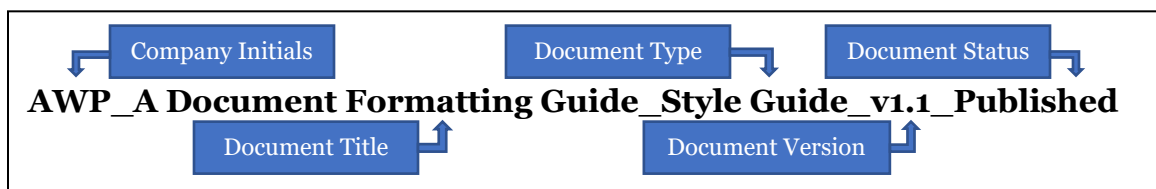
The section symbol “§” is used when citing a section of state or federal regulations. There should be a space between the “§” symbol and the number. A nonbreaking space, or hard space, should be used so that the symbol and the number are not split across lines or pages.

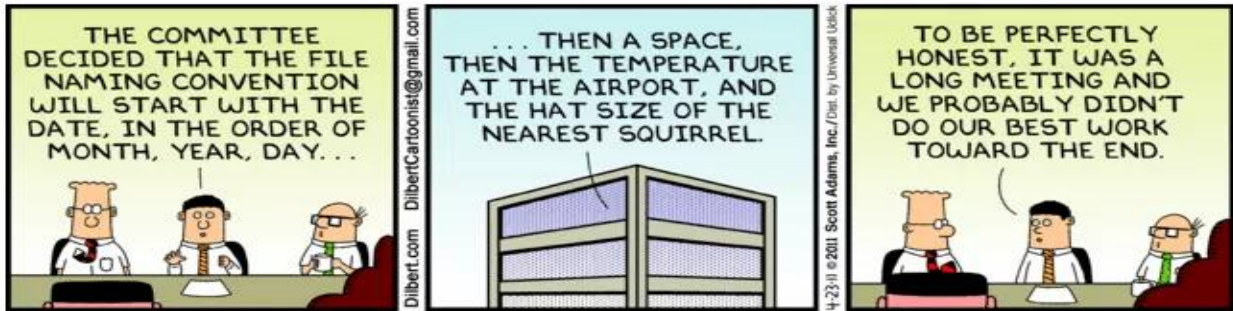
**For example:** 49 CFR 192.12 - Underground Natural Gas Storage Facilities can also be referred to as “§ 192.12

## 11 File Naming Convention (FNC)

A File Naming Convention (FNC) is a framework for naming your files in a way that describes what they contain and how they relate to other files. Developing an FNC is done through identifying the key elements of the project, the important differences and commonalities between your files:

- To provide additional information (i.e., metadata) about the use to which an identifier is put;
- To help formalize expectations and promote consistency within a development team;
- File and document names should include:
  - Document Type
  - Document Title
  - Company Initials
  - Document Version
  - Document Status
- Suggested FNC:





## 12 Project Cycle

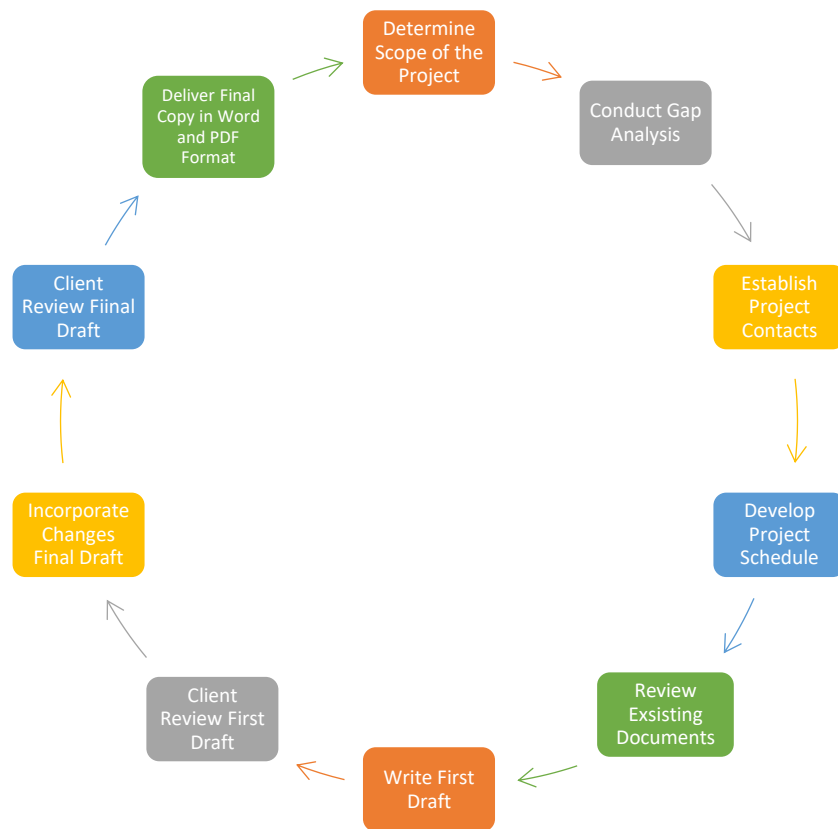


Figure 2 – Documentation Project Cycle

### 12.1 Determine the Scope of the Project

Project scope is the part of project planning that involves determining and documenting a list of specific project goals, deliverables, features, functions, tasks, deadlines, and ultimately costs. The project scope determines what needs to be achieved and the work that must be done to deliver a project.

## 12.2 Conduct Gap Analysis

The goal of any gap analysis (**Figure 3**) is to determine the current condition of the project, establish the desired outcome for the project, and then identify what “gaps” exist that need to be filled, and what steps should be taken to ensure that the desired outcomes are met successfully.



**Figure 3 – “Gap” Analysis**

## 12.3 Establish Project Contacts

- Chain of command for project
- Subject matter expert contact information

## 12.4 Develop Project Schedule

- Break down tasks to steps
- Create Project Tracking Spreadsheet
  - Title column
  - Delivery column
  - Approval column
- Create Weekly Project Update Email Template (Figure 4)
  - Accomplished tasks (for past week)
  - Planned tasks (for next week)
  - Issues/risks identified
  - Numbered details

<b>Weekly Project Update Email</b>
<b>Accomplished Tasks: Week 6 – April 15, 2019 – April 19, 2019</b>
<ol style="list-style-type: none"><li>1. Deliver second set of 7 first-draft AWP-OM-WI documents to AWP for SME review and revision.</li><li>2. Complete third set of 8 first-draft AWP-OM-WI documents.</li></ol>
<b>Planned Tasks: Week 7 - April 22, 2019 – April 26, 2019</b>
<ol style="list-style-type: none"><li>1. Deliver third set of 8 first-draft AWP-OM-WI documents to AWP for SME review and revision.</li></ol>
<b>Issues/Risks identified</b>
<ol style="list-style-type: none"><li>1. Waiting on first draft revisions from AWP.</li></ol>

**Figure 4 – Sample Weekly Project Update Email**

## 12.5 Review Existing Documents

- Review any existing documents including references cited.

## 12.6 Write First Draft

- Create document title and file name (include version number), using SPARK THOUGHT document naming convention (Section 11)
- Create first draft documentation format
- Include all style formats in first draft document template
- Use first draft template to create all documents
- Watermark as “DRAFT”
- Create first draft delivery document
  - Short cover sheet that provides questions that need to be answered as client reviews first draft

## 12.7 Client Review of First Draft

- Encourage client to use change-tracking feature on Word when making additions, revisions, or corrections.

## 12.8 Incorporate Client Changes for Final Draft

- Make changes and revisions.
- Mark document as final copy.

## 12.9 Return to client for final review.

## 12.10 Client Review of Final Draft

- Make final changes or revisions.

## 12.11 Deliver Final Copy in Word and PDF Format

- Deliver final copy of document(s) to client.
- Verify version (i.e., final, version number, date) of document.
- Ensure all watermarks removed.
- Final documents delivered in Word and PDF format (hard-copies, if requested).

