

Maintaining the Standards and Procedures Manual

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Maintaining the Standards and Procedures Manual

Definition and Description

The Standards and Procedures Manual is used to provide personnel with guidelines and instructions on performing their functional responsibilities. Sections 1-10 of this manual are devoted to the Systems Management disciplines.

When changes to the environment, or the functions performed by company personnel occur, the Standards and Procedures Manual must be updated to reflect the new functions. This manual section describes how maintenance to the Standards and Procedures Manual is performed. Another manual section will provide instructions on maintaining the User Guides.

Mission

To provide instructions on locating and updating sections of the Standards and Procedures Manual. To further provide instructions on how the Microsoft Word and PowerPoint products are used to maintain the Standards and Procedures Manual.

Objectives

Maintain the Standards and Procedures Manual in a current and accurate manner using the Microsoft Office Professional product.

Scope

This manual section will provide complete instructions on the tools and procedures used to create and maintain the Standards and Procedures Manual via the Microsoft Office Professional product. It is not intended to train personnel on the use of Microsoft Office, but will illustrate how the product is used to create and maintain the Standards and Procedures Manual. To gain a better understanding of the Microsoft Office Professional product refer to the products Help facility or Manuals.

Process Overview

The maintenance process is initiated whenever major changes have been implemented and/or after periodic reviews have detected a need to update the manual's data and/or format.

Viewing and Maintaining the S&P Manual is performed on-line via PC. The Microsoft Office Professional product is used to create and maintain S&P Manual sections.

The S&P Manual sections are stored within a hard disk repository in a unique directory. Each manual section is a separate file within the S&P Manual directory.

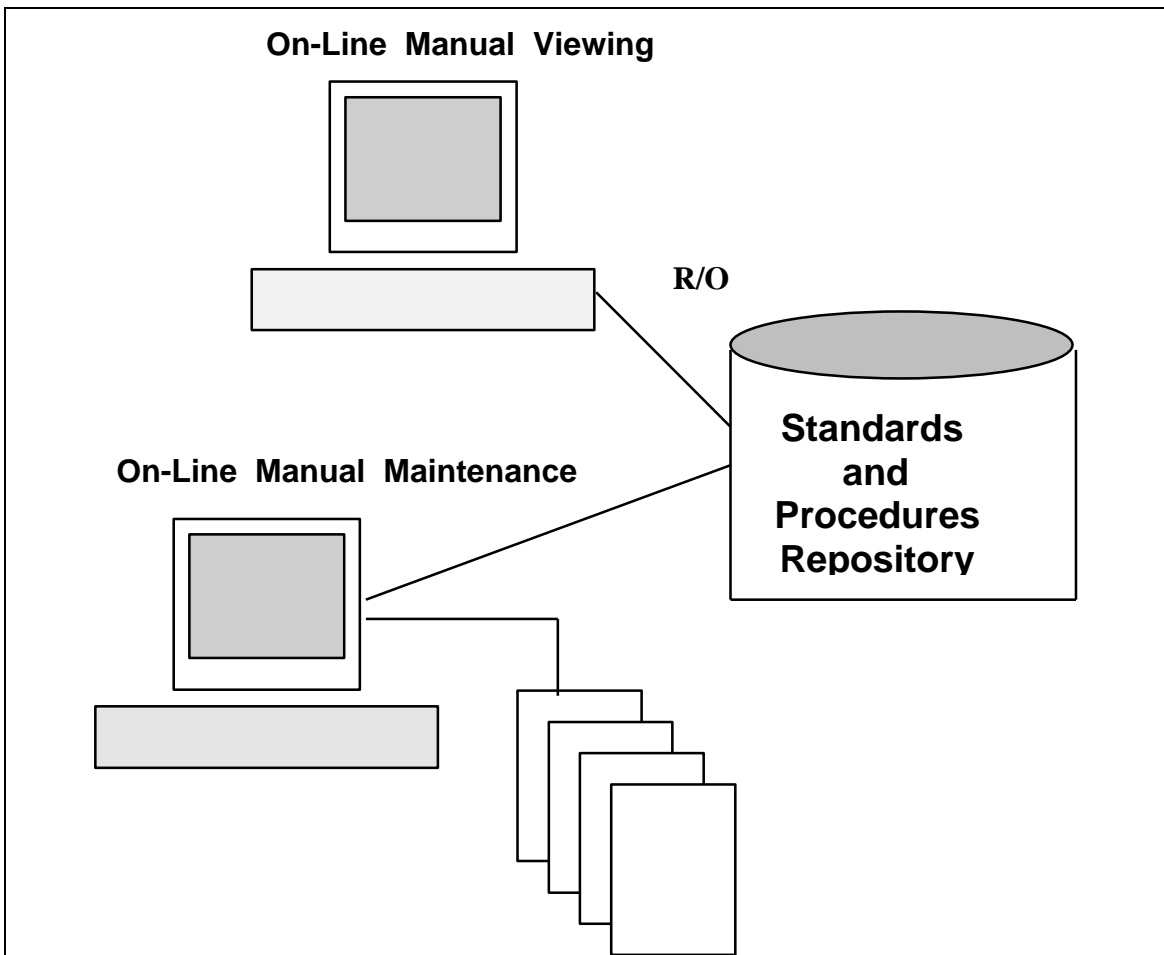


Figure 1: Standards and Procedures Manual Repository

Through the new features of Microsoft Word Release 6.0, it is now possible to have a Master Document that is used to pull together the sections of the Standards and Procedures Manual into one overall document. This feature is used when generating the Standards and Procedures Manual.

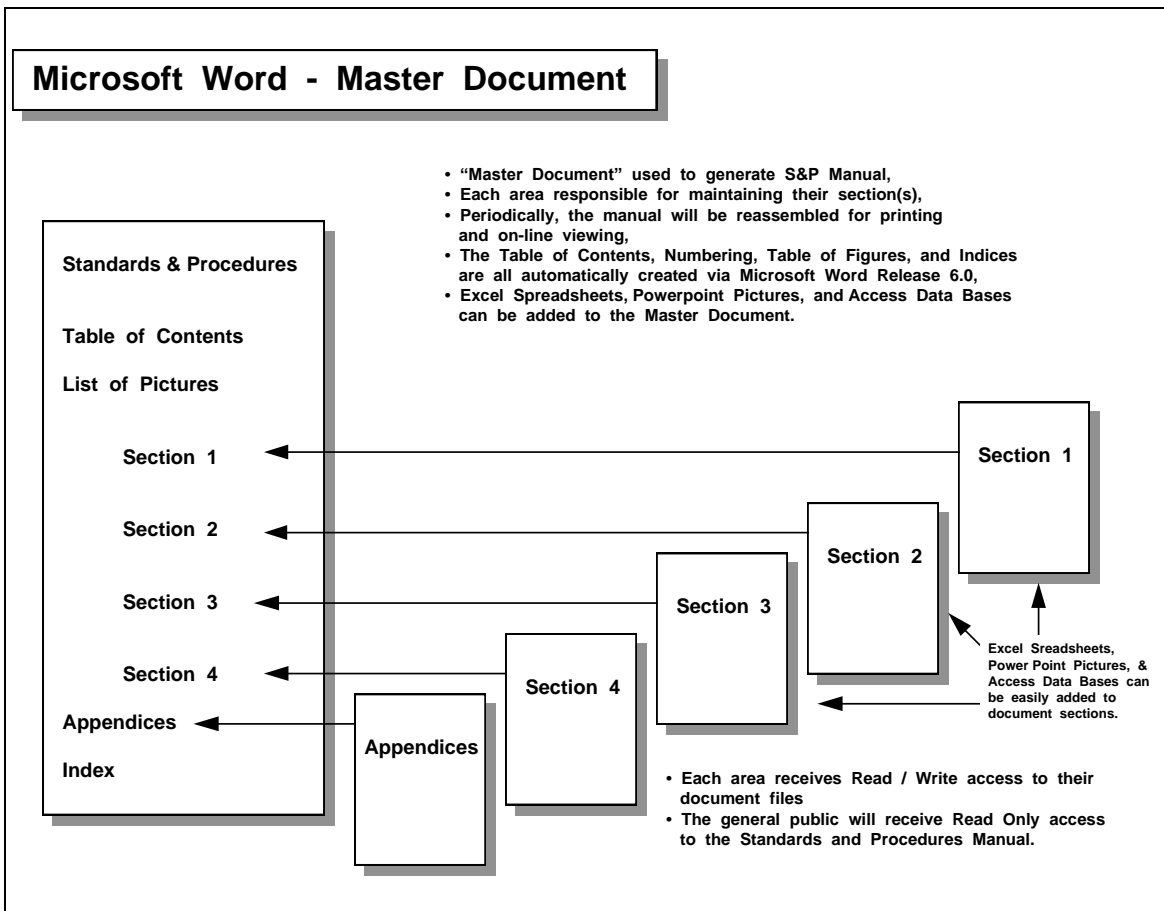


Figure 2: Generating the S&P Manual via a Master Document

Through this feature it is possible to allow each SMC discipline owner to maintain their own section(s) of the S&P Manual. Whenever changes are made, they can route the changes to the S&P Library and replace the existing section file with the updated file.

Changes to the S&P Manual are inserted whenever the manual is compiled via the Master Document or simply printed via normal hardcopy methods.

S&P Library

The libraries used to hold the sections of the Standards and Procedures Manual and their associated figures are described below.

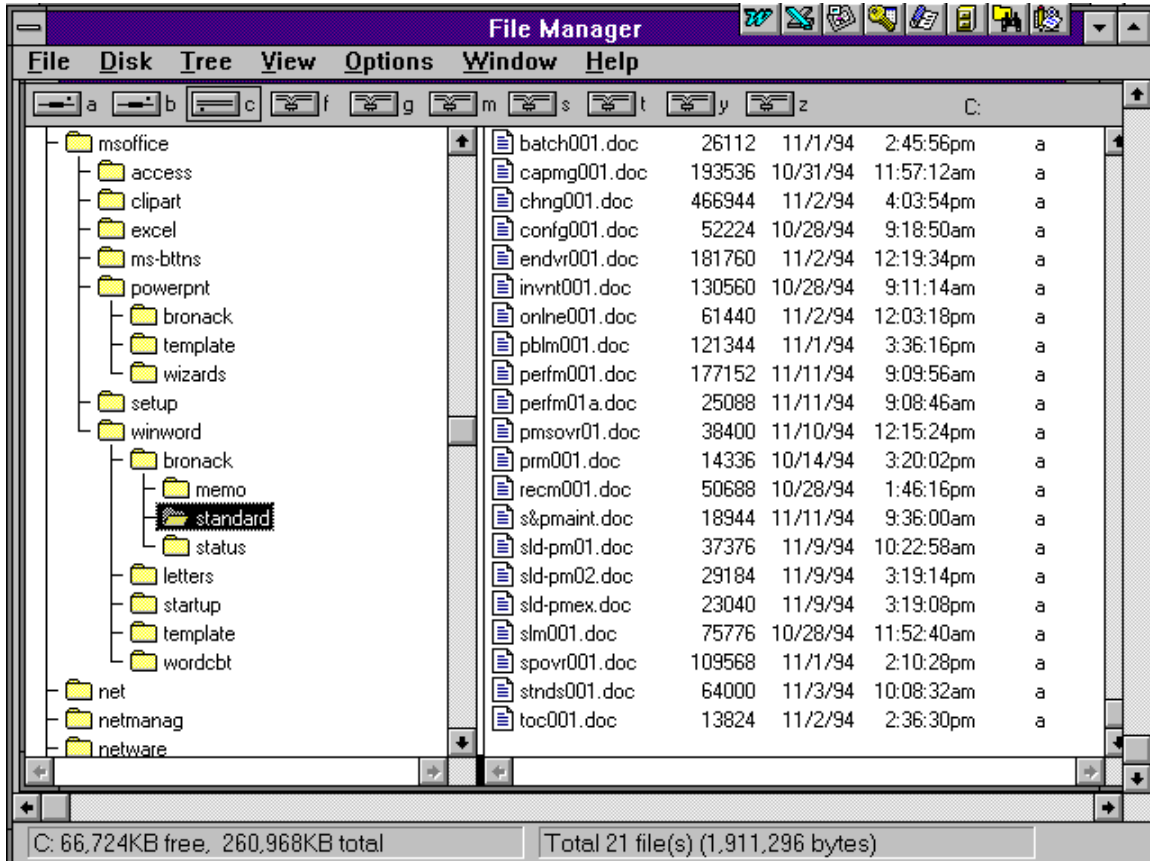


Figure 3: S&P Manual Word and PowerPoint Libraries

C:\MSOFFICE\WINWORD\BRONACK\STANDARD

Contains all Microsoft Word document files representing the sections of the Standards and Procedures Manual.

C:\MSOFFICE\POWERPNT\BRONACK

Contains all the Microsoft PowerPoint document picture files used as figures within the Standards and Procedures Manual.

S&P Modules

Microsoft Word Files are located in:

C:\MSOFFICE\WINWORD\BRONACK\STANDARD

The Cross-Reference of files to manual sections is:

Manual Section:	File:	Section Number
Table of Contents	TOC001	
Overview of Manual	SPOVR001	
Inventory Management	INVNT001	1.0
Configuration Management	CONFIG001	2.0
Capacity Management	CAPMG001	3.0
Performance Management	PERFM001	4.0
Service Level Management	SLM001	5.0
Batch Management	BATCH001	6.0
On-Line Management	ONLNE001	7.0
Recovery Management	RECM001	8.0
Problem Management	PBLM001	9.0
Change Management	CHNG001	10.0
S&P Manual Maintenance	S&PMAINT	11.0

Figure 4: S&P Manual Section to File Cross-Reference

All of the above modules are Microsoft Word documents, most with at least one Microsoft PowerPoint picture contained within them.

The section number for each file is provided. The ‘Heading Numbering’ function, from the Format Toolbar, is used to number files after updates have been completed. If you add/delete a ‘Heading (1-3)’ then you will have to renumber the document headings and reproduce the Table of Figures and Table of Contents for that file.

Microsoft Word

The Microsoft Word features used to support the Standards and Procedures Manual are listed within this section, with particular attention paid to the features used most.

- **Template**

The '**Normal**' Template is used to format the Standards and Procedures Manual, with the modification of some 'Styles' to accommodate manual needs. The Normal Template will accompany Standards and Procedures files when they are copied and/or moved.

You must use the NORMAL template when creating, or editing the Standards and Procedures Manual. Utilizing the same template for all manual sections will result in a common format for the entire manual and supports the use of a Master Document approach to generating the Standards and Procedures Manual.

- **Format Styles**

- **Caption** - Changed to Times New Roman, 10 points bold Italic, with no left indent.
- **Cover** - Created as ARIAL, 22 points, right justified.
- **Figure** - Created as Bordered Box around picture.
- **Heading 2** - Changed to ARIAL, 12 points bold, with no left indent.
- **Heading 3** - Changed to ARIAL, 12 points bold, with no left indent.
- **TOC1** - Changed to ARIAL bold, 10 points, small caps.
- **TOC2** - Changed to ARIAL bold, 10 points, small caps, left indent = '2'.
- **TOC3** - Changed to ARIAL regular, 10 points, small caps, left indent = '4'.

- **Header and Footer**

Use the **VIEW** function from the Toolbar to access the **Header/Footer** facility. Make sure you select the 'Different First Page' option when creating/updating the Header or Footer. This will eliminate the Header/Footer from the Cover Page of the document and start numbering on the next page at '2'.

The **Header** of each manual section must be worded like the header of this document (i.e., RDC Thailand Standards and Procedures Manual) and the 'Border' (Format Toolbar) function should be used to draw a line under the Header.

The **Footer** of each section must contain the Section Name on the left side and the Page number must be on the right side. Prefix the number with the section number (i.e., Page: 11.). Use the 'Page Number' function (#) to insert page numbers after the section number.

For additional information regarding the Headers and Footers consult the Microsoft Word Help facility or product manuals.

- **Inserting pictures and objects**

Sometimes inserting a picture, object, spreadsheet, data base, etc. within the Standards and Procedures Manual will enhance the effectiveness of your presentation. The Microsoft Office Professional allows you to easily insert data from PowerPoint, Excel, Access, or Clip Art files into a Word document.

The easiest method for inserting pictures/objects is through the use of the Copy/Paste Clipboard function. This is accomplished by:

- Open the file that contains the picture/object that you want to copy,
- Select the data you want to copy,
- From the Edit toolbar, select Copy,
- The Copy function copies the selected data into the memory resident Clipboard,
- Switch to the Word document,
- Position cursor where you want to insert,
- Select Paste from the Edit toolbar, and
- When you click on the Paste function the data presently stored in the Clipboard will be inserted into your document.

This process works for any product running in the Windows environment, regardless of the product's vendor. Copy/Paste is a Windows function and not an application function.

Another use of the Copy/Paste function is when you want to copy the Screen Image to a Word document. Simply depress the Print Screen button and the screen will be copied to the Clipboard. Clicking on paste will insert the screen from the Clipboard.

The Copy/Paste function provides a copy of the object at the time the copy/paste was performed. The object is not updated in the Word document, when it is updated in the file where it resides. This may, or may not, be what you want. If you want the Word file updated when the object is updated in its resident file, then use the LINK function. The Windows functions of Dynamic Data Exchange (DDE) and Object Linking and Embedding (OLE) are used to support this feature.

- **Inserting Captions**

Select the Insert function from the toolbar to access the Insert Caption function.

The 'Insert Caption' function is used to add captions to figures which will be compiled into a Table of Figures located at the beginning of the manual's section. The Caption's style has been altered to: Times New Roman, 10 point, bold italic. The Caption should be inserted on the line immediately after the figure that the Caption applies to.

When using the Insert Caption Function, each Figure Number is automatically advanced, or lowered, appropriately. Should you insert a new figure between existing figures, the figure numbers after the new figure will automatically be increased by the number of inserted figures. When the Table of Figures is recreated, the new figures will be included and the figure numbers updated accordingly.

- **Section Layout**

The layout of all sections contained within the Standards and Procedures Manual are identical, they are:

- Cover Page,
- Section Table of Contents,
- Section Table of Figures,
- Section document,
- Section Appendices (optional),
- Section Glossary (optional).

The section document contains the materials covered within the Standards and Procedures Manual section, while the other parts of the section are used to locate and clarify the data contained within the section.

Every section is formatted in the same manner listed above.

- **Generating Table of Figures**

The Table of Figures is generated after all Captions have been added to the figures contained in the document.

- To Generate a Table of Figures, select the ‘Index and Tables’ option from the ‘Insert’ function of the Toolbar. The Index and Tables display will be presented as a result of the option selection.

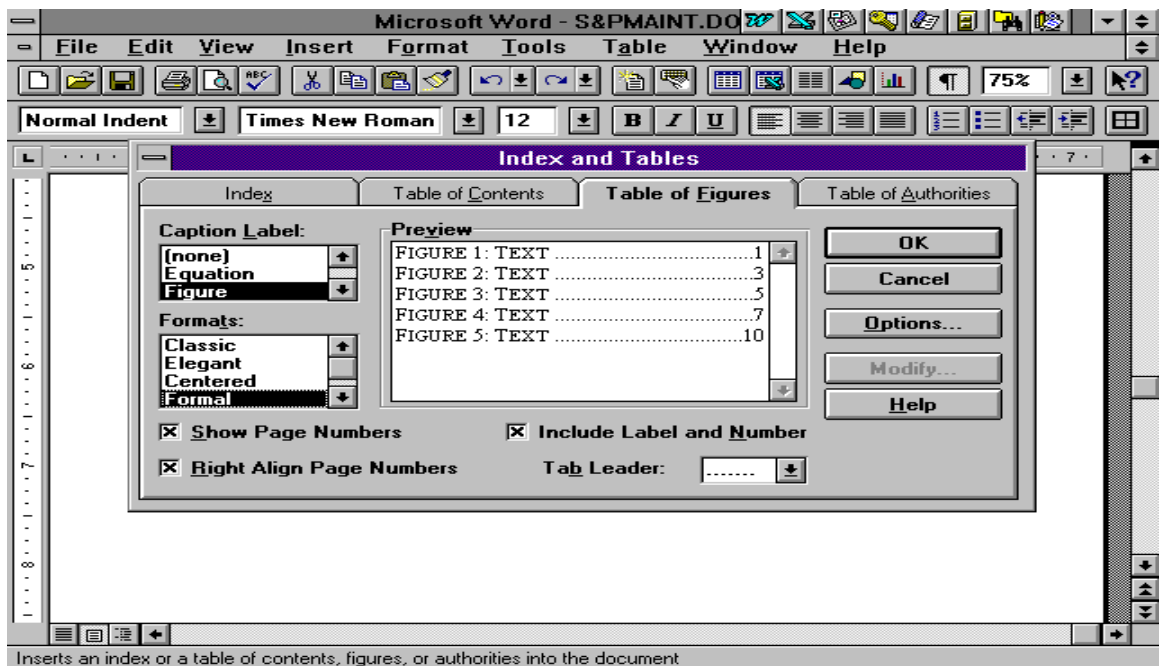


Figure 5: Index and Table Generation Function

Enter the options shown above to generate a Table of Figures in the format used in the Standards and Procedures Manual. Captions labeled ‘Figure’ will be included in the “Table of Figures”, which will be generated in the ‘Formal’ format style.

Click on the OK button and Word will generate a Table of Figures for the document in the format selected. Make sure that you have positioned your cursor where you want to have the Table of Figures inserted. If you did not place the cursor at the desired insertion site, you can cut and paste the Table of Figures to its proper location (page immediately after the Table of Contents).

- **Generating Table of Contents**

The Table of Contents is generated after all Headings have been added to the document and the ‘Heading Numbering’ process completed. It is suggested to generate the Table of Contents after generating the Table of Figures, so that page numbering will be correct.

- To Generate a Table of Contents, select the Insert function from the Toolbar. Selecting Index and Tables provides the following results.

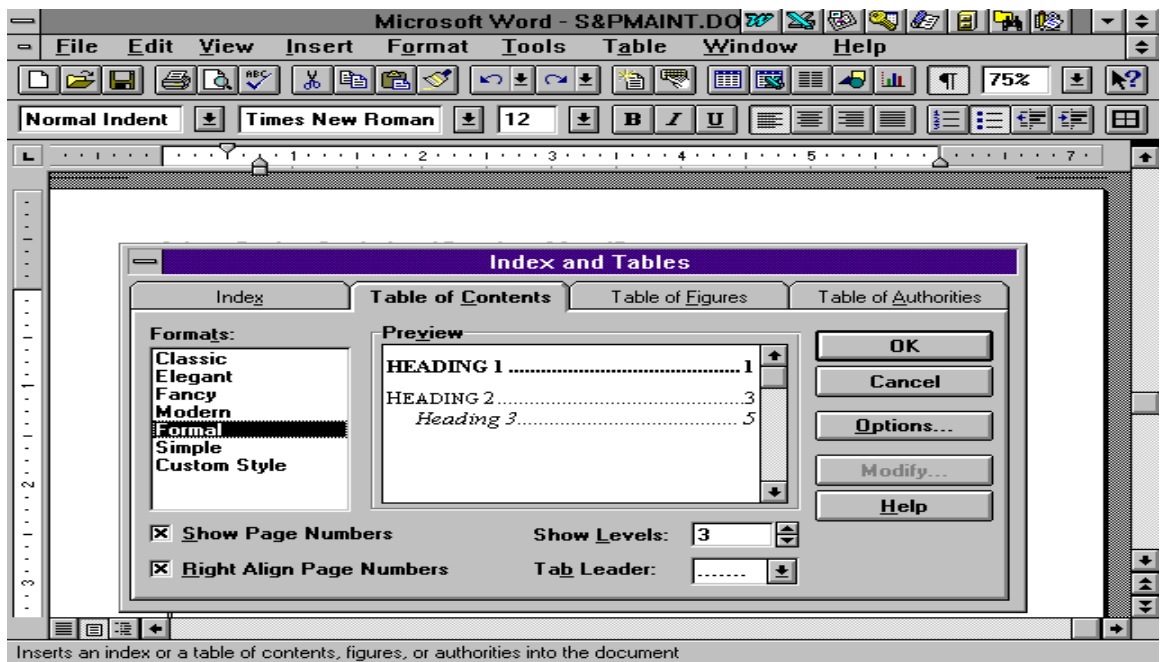


Figure 6: Generating a Table of Contents

Enter the options shown above to generate a Table of Contents in the format used in the Standards and Procedures Manual. Use ‘Formal’ format and ‘Show Levels: of 3’. This will generate Table of Contents for Heading 1-3 in the Formal format.

Click on the OK button and Word will generate a Table of Contents for the document in the format selected. Make sure that you have positioned your cursor where you want to have the Table of Contents inserted. If you did not place the cursor at the desired insertion site, you can cut and paste the Table of Contents and move it to its proper location (page immediately after the Cover Page).

- **Modifying Styles used for the Table of Contents.**

The styles used to support the three table of contents levels are: TOC1, TOC2, and TOC3.

After generating the Table of Contents, it is sometimes necessary to format the TOC styles to match the styles of the other Section Table of Contents. The procedure for modifying the TOC styles is:

- Select the TOC style from within the Table of Contents by placing cursor on style to be modified,
- Select the Style option from Format on the toolbar,
- The Style display will be provided as a result of these operations,

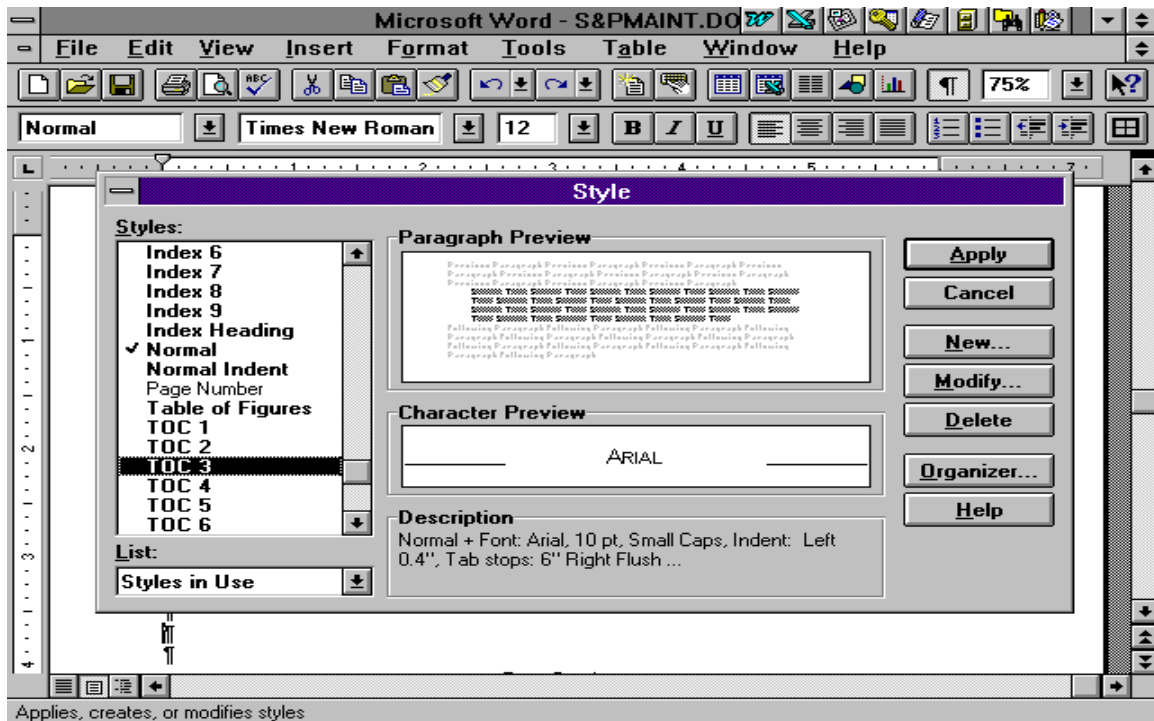


Figure 7: Modifying TOC Styles

- Select the TOC style to be modified (i.e., TOC3 shown),
- Click on the Modify function,
- The Modify Styles display will be provided as a result of these operations,

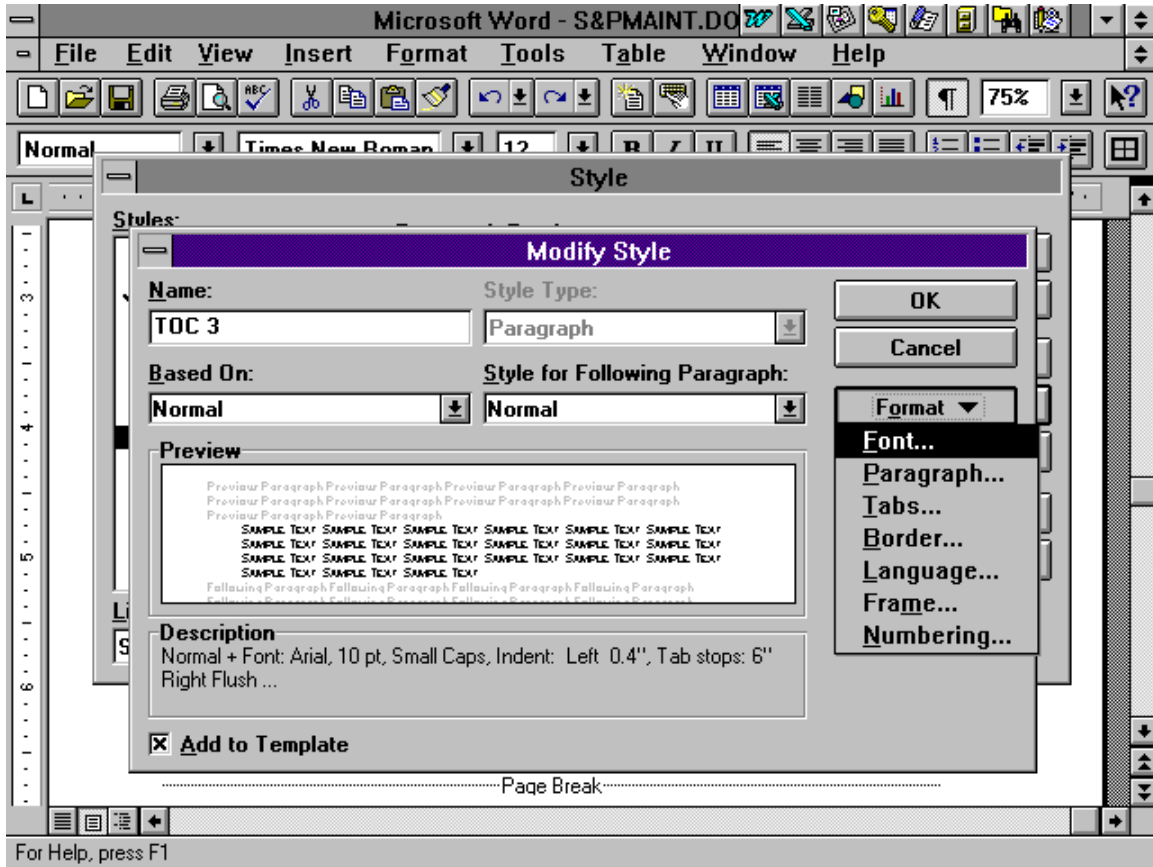


Figure 8: The Modify Style display screen

- Click on the ‘Add to Template’ field as shown above,
- Click on Format to alter the Font and Paragraph settings,
- All Font settings are ARIAL, 10 Points in size, and Small Caps,
- The TOC1 and TOC2 styles are Bold, TOC3 is Regular,
- The Paragraph settings are:
 - TOC1 - no indent from left,
 - TOC2 - 2 indent from left,
 - TOC3 - 4 indent from left.

After modifying the fonts and paragraph settings for TOC1-TOC3, the Table of Contents should look like the one at the beginning of this section.

Insert a blank line after each section to dress up the Table of Contents and make it easier to find topics.

For further information on Style Modifications, see the Microsoft Word help facility.

Microsoft PowerPoint

PowerPoint is the tool used to insert drawings and illustrations within the Standards and Procedures Manual. It is included in the Microsoft Office Professional product and is integrated with the Word, Excel and Access products.

- **S&P Library**

The PowerPoint Library used to contain pictures and objects used within the Standards and Procedures Manual is:

C:\MSOFFICE\POWERPNT\BRONACK

- **S&P Files**

Files contained in the PowerPoint Library are used to insert pictures and objects into Standards and Procedures Manual sections. These files and the sections they are associated with are.

Manual Section:	File:	Number
Inventory Management	SMC001	1.0
Configuration Management	SMC001	2.0
Capacity Management	SMC001	3.0
Performance Management	SMC001	4.0
Service Level Management	SMC001	5.0
Batch Management	BATCH001	6.0
On-Line Management	SMC001	7.0
Recovery Management	SMC001	8.0
Problem Management	CRISIS01	9.0
Change Management	CHNGOVR1	10.0
S&P Manual Maintenance	S&PMAINT	11.0

To access an embedded picture or object, simply double click on the object and you will be taken to Microsoft Draw with the picture/object displayed. You can edit the picture/object directly in Draw or from PowerPoint.

- **Creating PowerPoint Pictures**

Select the PowerPoint product by clicking on its icon from the Program Manager, or via the Microsoft Office PowerPoint icon at the top of the screen.

PowerPoint will provide you with a drawing screen and tools to use in creating and documenting pictures. Use the PowerPoint facilities to create the picture/object that you want inserted within the Standards and Procedures Manual.

Should you need assistance in learning the PowerPoint product use the Help facility or the PowerPoint Manuals.

- **Editing PowerPoint Pictures**

By double clicking on a PowerPoint picture/object contained within the Standards and Procedures Manual, you will be presented with the picture/object in Microsoft Draw mode. You can edit the picture from within Draw, or you can go to PowerPoint and edit the picture directly in PowerPoint. This is usually the best route to take, since editing the picture in Draw does not alter the PowerPoint picture.

Use the Copy/Paste functions of Edit to copy the picture from PowerPoint and replace the existing PowerPoint picture/object in the Standards and Procedures Word document. See the Help facility, or reference the Word manuals for additional information of using Copy/Paste.

- **Inserting PowerPoint Pictures within S&P Files**

Use the Copy/Paste feature from the Edit Toolbar to copy and paste PowerPoint pictures/objects to the Word document associated with the Standards and Procedures section being created/edited.

For more information on using this feature consult you Word and/or PowerPoint manuals.

Process Flow

Locating current S&P Library

The Standards and Procedures files are in Microsoft Word format, with Microsoft PowerPoint pictures inserted as figures within the documents. You need to locate both Word and PowerPoint libraries to fully update the Standards and Procedures Manual. These libraries can be located at:

- **WORD** 'C:\MSOFFICE\WINWORD\BRONACK\STANDARD'
- **POWERPOINT** 'C:\MSOFFICE\POWERPNT\BRONACK'

To relate the Standards and procedures section to its file, the following Cross-Reference is supplied. Separate Cross-References for Word and PowerPoint are provided.

WORD Files:

Manual Section:	File:	Section Number
Table of Contents	TOC001	
Overview of Manual	SPOVR001	
Inventory Management	INVNT001	1.0
Configuration Management	CONFG001	2.0
Capacity Management	CAPMG001	3.0
Performance Management	PERFM001	4.0
Service Level Management	SLM001	5.0
Batch Management	BATCH001	6.0
On-Line Management	ONLNE001	7.0
Recovery Management	RECM001	8.0
Problem Management	PBLM001	9.0
Change Management	CHNG001	10.0
S&P Manual Maintenance	S&PMAINT	11.0

Figure 9: Word File Cross-Reference

POWERPOINT Files:

Manual Section:	File:	Section Number
Table of Contents	TOC001	
Overview of Manual	SPOVR001	
Inventory Management	INVNT001	1.0
Configuration Management	CONFIG001	2.0
Capacity Management	CAPMG001	3.0
Performance Management	PERFM001	4.0
Service Level Management	SLM001	5.0
Batch Management	BATCH001	6.0
On-Line Management	ONLNE001	7.0
Recovery Management	RECM001	8.0
Problem Management	PBLM001	9.0
Change Management	CHNG001	10.0
S&P Manual Maintenance	S&PMAINT	11.0

Figure 10: PowerPoint File Cross-Reference

Selecting S&P Manual Files

To select the desired Standards and Procedures file for viewing or editing, either double-click on the file, or click once on the file and depress <enter>.

Browsing S&P Files

To browse a selected file must be authorized for Read Access to the File. When browsing, files you can look at any information you desire, but you cannot alter the data in any way. Utilize the normal navigation facilities of Microsoft Word to move around in the file (see Help Facility for additional information on navigating within a Word document).

Editing S&P Files

If you have been designated as the individual responsible for maintaining a section of the Standards and Procedures Manual, you can perform your maintenance in one of two ways. Either edit the file in your own library and then forward a copy of the file to the Standards and Procedures Library to replace the original file, or you can edit the original file directly. It is suggested that the first method be utilized, so the Standards and Procedures Library is not locked out during the Edit process. Additionally, the first method makes it easier to have back-up copies, should the section become damaged.

Inserting Pictures and Objects

You can insert PowerPoint pictures within a Word document via the Copy/Paste feature. The following steps are followed to perform this operation:

- Create/Select the PowerPoint slide,
- Copy the slide (or a section of the slide) to the Clipboard,
- Switch to Word,
- Position the cursor where you want to insert the picture,
- Paste the data from the Clipboard, and
- Insert a Caption after the picture has been inserted.

See the topics on Inserting Captions and creating a Table of Figures in this section for further information.

Heading and Numbering

The Heading and Numbering function will automatically number the sections and subsections of a document by assigning a number to a 'Heading' style (i.e., Heading 1, Heading 2, Heading 3, etc...).

Use a Heading Style to denote a section or subsection. After you have completed associating sections and subsections to Heading Styles, you can automatically:

- Number the document.
- Generate a Table of Contents with numbering.

The process of numbering a document is described below.

- From the FORMAT toolbar function, select Heading Numbering.

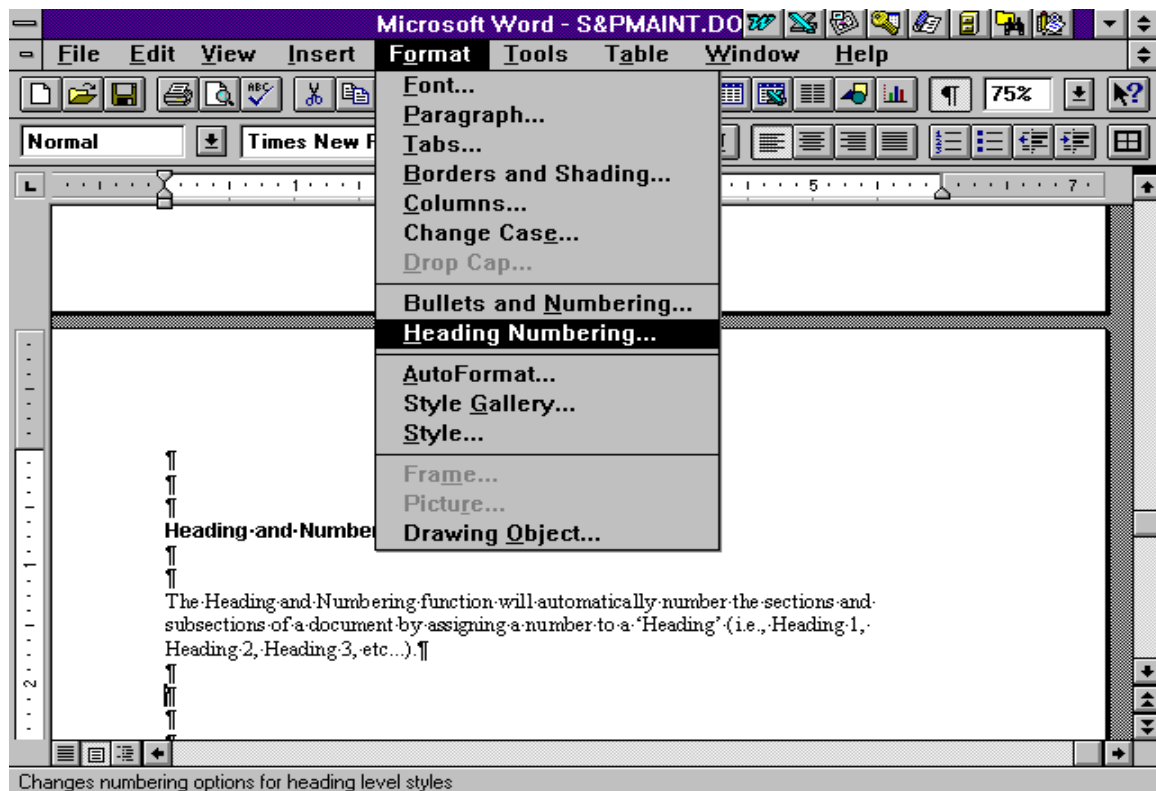


Figure 11: Heading and Numbering selection

- To number a document select the type of Heading Numbering you desire and click on the MODIFY button.

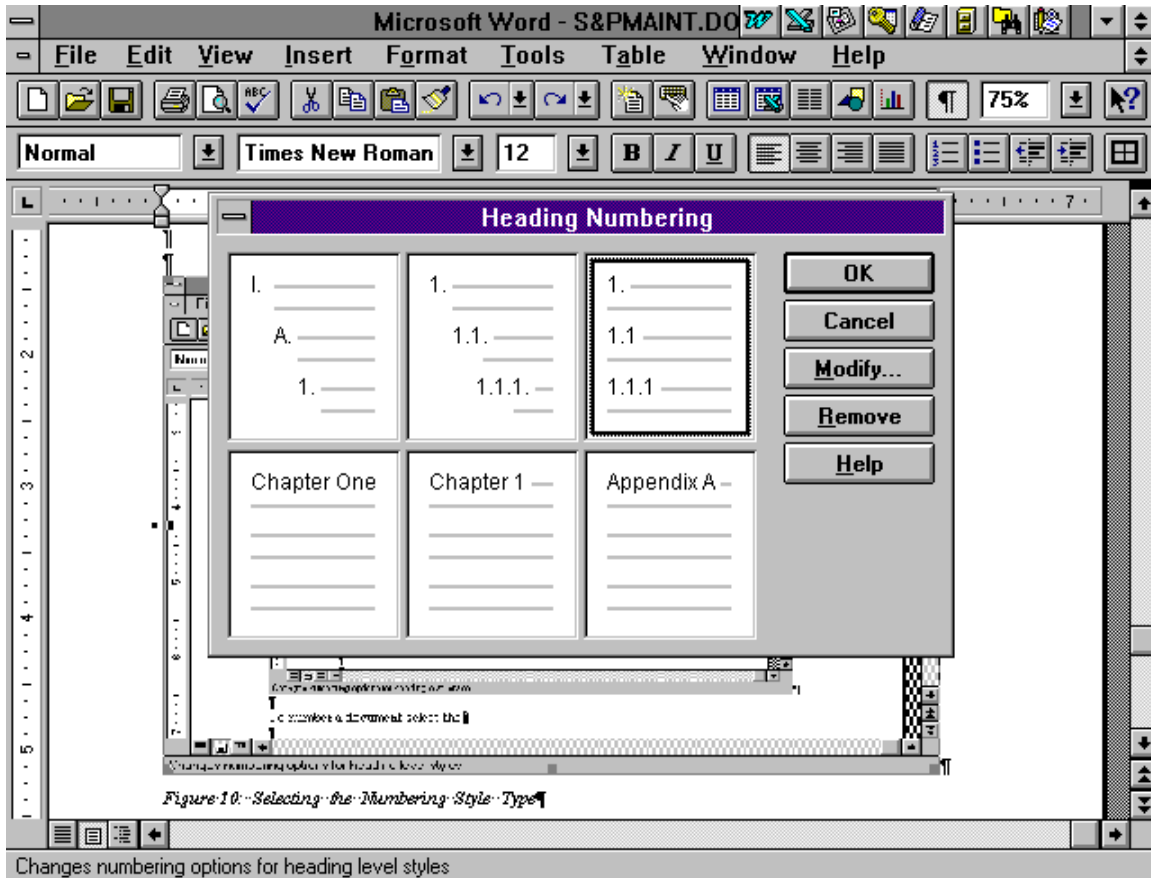


Figure 12: Selecting the Numbering Style Type

- Each section of the Standards and Procedures Manual has its own unique section number (i.e., 1-11 for S&P Manual, 12 on for User Guides). To determine the number of the section you are numbering, refer to the Standards and Procedures Manual’s Table of Contents.
- To change the numbering of this manual section you must enter the number in the ‘Start At’ function (‘11’ used in the following example) and hit <enter>.

- Microsoft Word Release 6.0 will then automatically search through your document and:
 - Insert the ‘Start At’ number for the first ‘Heading 1’ (updating the Start At number for every subsequent Heading 1- 11, 12, 13, etc..).
 - For every ‘Heading 2’ the first number level below the ‘Start At’ number is inserted in sequence (i.e., 11.1, 11.2, 11.3, etc...).
 - For every ‘Heading 3’ the next number level is inserted (i.e., 11.1.1, 11.1.2, 11.1.3, etc...)

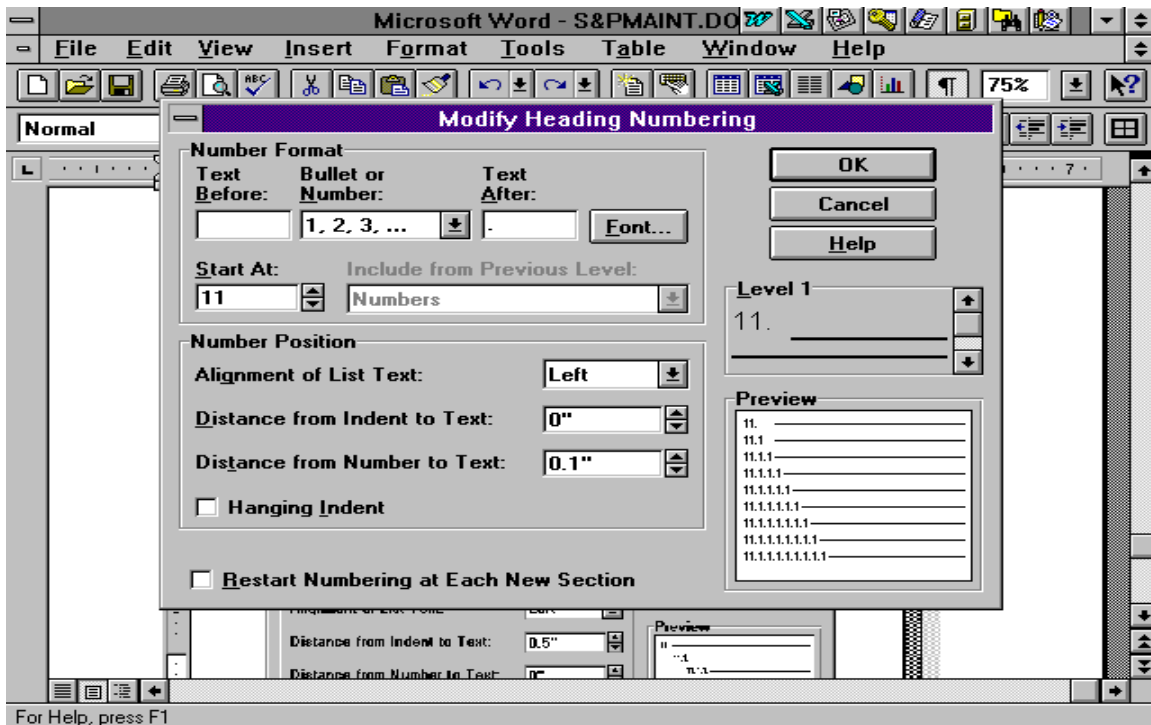


Figure 13: Modify Heading Number selection screen

Because of the number technique used, it is important that there be only one ‘Heading 1’ per document section. This will relate all numbers in that section to the section number (i.e., section 11 for this section). If you have more than one ‘Heading 1’ in the section, then the section numbers will be advanced by one for every ‘Heading 1’ that is encountered. Heading and Numbers problems can be easily found by reviewing the file and changing wrongly selected Headings to their correct values (i.e., from Heading 1 to Normal). Numbering will be automatically updated when performing this modification.

Creating Table of Figures

The Table of Figures is created after all Figures and Captions have been added to the document. The Table of Figures is inserted in each section right after the Table of Contents. You should generate the Table of Figures before creating the Table of Contents, because the number of pages used for a Table of Figures must be known when calculating page numbers in the Table of Contents section.

The steps followed when creating a ‘Table of Figures’ are:

- Insert all Figures within the document,
- Create Captions for all of the Figures,
- Go to the page after the Table of Contents,
- Insert three lines from the top of the page,
- Enter the following text “Section Table of Figures”,
- Center, Underline, and Bold the text just created,
- Insert two more lines under the text just created,
- From the INSERT toolbar, select ‘Index and Tables’,
- Select Table of Figures from available options,
- Select Figure from Caption Label: and Formal from Formats: fields,
- Click on OK and Word will generate the Table of Figures and place it in your document where you last had your cursor.

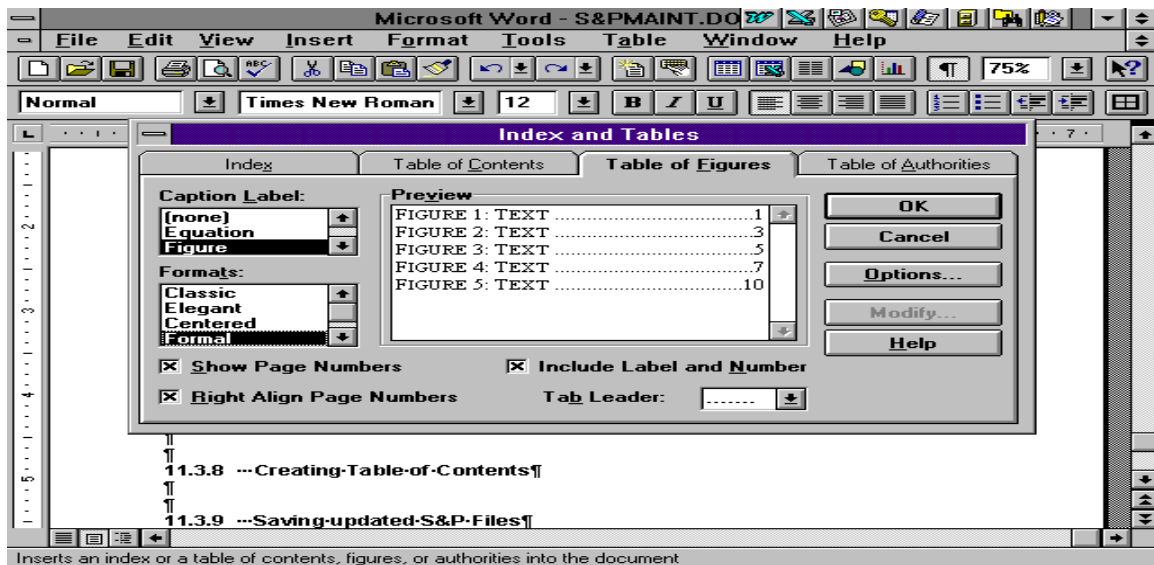


Figure 14: Creating a Table of Figures

Creating Table of Contents

The last process performed in generating/updating a section of the Standards and Procedures Manual is the creation of a “Table of Contents”. It is placed immediately after the ‘Cover Page’ and just prior to the ‘Table of Figures’.

The process followed when creating a Table of Contents is:

- Position your cursor on the top of the page just after the Cover Page,
- Insert three blank lines from the top of the page,
- Enter “Section Table of Contents”,
- Center, Underline, and Bold the text just created,
- Insert two more blank lines,
- Position the cursor at the beginning of the next line,
- Select INSERT from the Toolbar,
- Select INDEX and TABLES from the drop down toolbar,
- Select Table of Contents and enter information as shown below,
- Formal format and 3 Show Levels must be selected,
- Clicking on OK will direct Word to Generate the Table of Contents, and
- Word will insert Table of Contents where cursor was last placed.

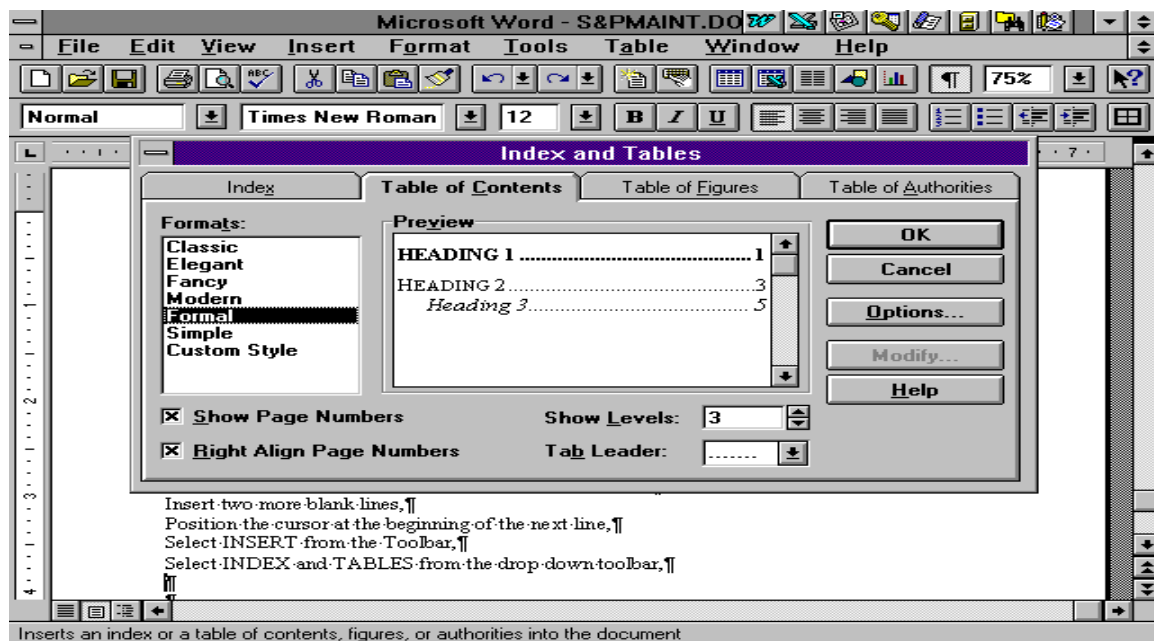


Figure 15: Creating a Table of Contents

Saving updated S&P Files

Once you have completed all updates to the Standards and Procedures section, simply save the section with the same name as the section you are replacing. It is recommended that you make a copy of the original section before you start the modification process.

If you neglected to make a copy of the original section, then:

- Save this section under another name,
- Select the original section,
- Save the original section to diskette,
- Close the original section,
- At this point you can delete the original section, and
- Rename the new section to the original sections name.

After completing the above process, you can save the newly creates section to the Standards and Procedures library under the same name as the section it is replacing. As a result of this process, you will have:

- Made a copy of the old section,
- Replaced the old section with the new section.

Printing S&P Manual Sections

To print the S&P Manual Section:

- Go to Word,
- Select the desired section from the Word Library,
- Select File after the document is loaded,
- Click on Print,
- Click on OK to print the entire document, or
- Click on Current Page to print only the page you are currently viewing, or
- Click on Pages and enter the range of pages that you want printed (i.e., 1-12, etc..),
- Click on OK will activate the print function.

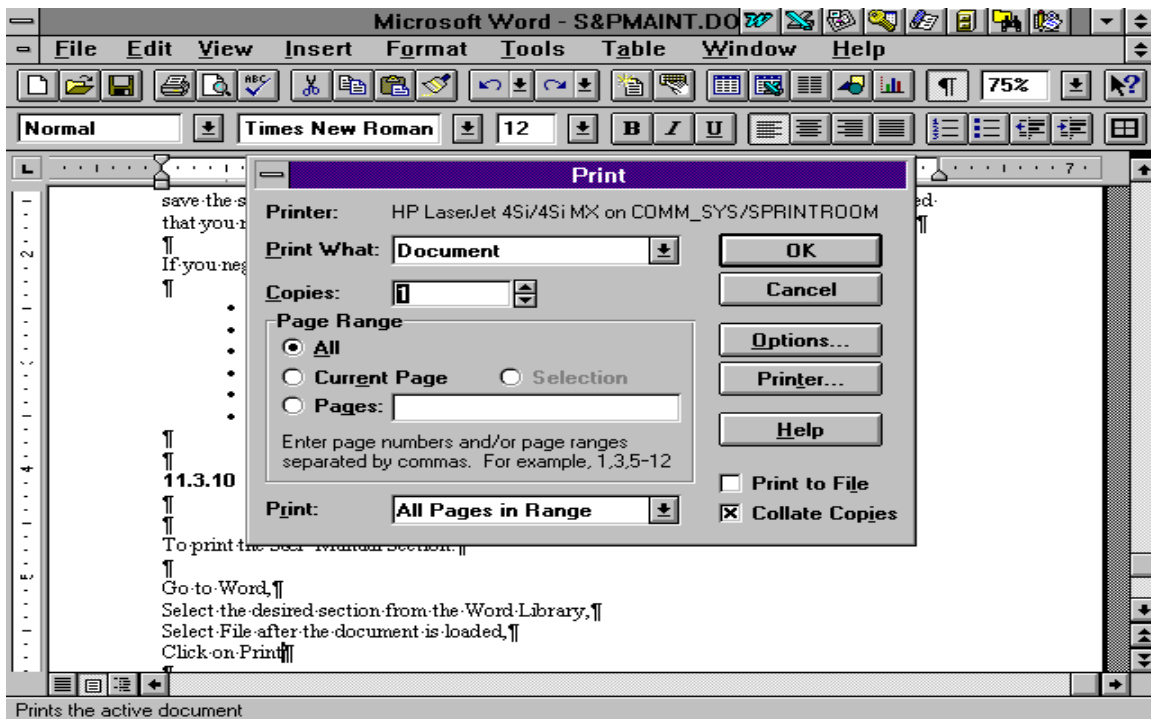


Figure 16: Printing a Standards and Procedures section

See the Microsoft help facility for more information on the Print function.