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## Document Editing Guidelines

### 1.0 Purpose

The purpose of this work instruction is to provide guidelines for editing and proofing procedures, work instructions, and training checklists created in MS-Word to assure their compliance to the standards set forth by First International Computer of Texas, Inc. (FICTX).

This instruction applies to anyone at FICTX that writes or submits documents for inclusion in the FICTX Quality System.

### 2.0 References

- 213001 Preparation & Revision Guidelines for Procedures and Work Instructions
- 205015 Quality Management Systems Definitions/Vocabulary


### 3.0 Responsibility

The **Document Control Manager** assigns responsibility for this instruction to be performed. This instruction is normally performed by **Document Control Center (DCC) Personnel**. In the event that this instruction requires change, the **Document Control Manager** shall approve any requested change.


### 4.0 Procedure

#### 4.1 Editing and Reviewing a MS-Word Document


- 4.1.1 Open the document.
- 4.1.2 Click the Show/Hide (¶) button on the toolbar to reveal carriage returns and spaces in the document.
- 4.1.3 Check the document properties.
  - 4.1.3.1 Click **File, Properties**. The Properties dialog box will open.
  - 4.1.3.2 Click the Summary tab.
  - 4.1.3.3 Check to ensure that all fields are properly completed.
    - 4.1.3.3.1 The Title field should be the document number, revision, and the document name in the following format: 999000-Z Sample Work Instruction.  
  
New documents will not have a document number or revision, and will be added by the DCC prior to inclusion in the quality system.
    - 4.1.3.3.2 The Subject field should contain the document name.
    - 4.1.3.3.3 The Author field should contain the name of the originator of the document.
    - 4.1.3.3.4 The Manager field should contain the name of the department responsible for originating the document.

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- 4.1.3.3.5 The Company field should contain “First International Computer, Inc.” or “FICTX”
- 4.1.3.3.6 The Category field should indicate the type of document. (i.e. Procedure, Work Instruction, Training Checklist, etc.)
- 4.1.3.3.7 The Keywords, Comments, and Hyperlink base fields may contain information, but none is required.
- 4.1.3.4 Correct any errors or omissions and click “OK”.
- 4.1.4 Check the template of the document.
  - 4.1.4.1 Click **Tools, Templates and Add-Ins**. The Templates and Add-Ins dialog box will open.
  - 4.1.4.2 The Document template field should contain the word “Normal”. If it contains anything else, highlight the word and press the **Delete** button.
  - 4.1.4.3 Click the **OK** button to close the Templates and Add-Ins dialog box.
- 4.1.5 Check the Page Setup format.
  - 4.1.5.1 Click **File, Page Setup**. The Page Setup dialog box will open.
  - 4.1.5.2 Click the Margins tab
  - 4.1.5.3 Check to ensure that all fields are properly completed.
    - 4.1.5.3.1 Top, Bottom, Left, and Right margins should be set at 1” (one inch).
    - 4.1.5.3.2 The Gutter should be set at 0” (zero inches).
    - 4.1.5.3.3 The Header and footer should be set at 0.5” (half an inch)
    - 4.1.5.3.4 The Mirror margins and 2 pages per sheet boxes should not be selected
    - 4.1.5.3.5 The Apply to field should be set at Whole document.
    - 4.1.5.3.6 Since the gutter is set at 0” it does not matter what is selected in the gutter position field.
  - 4.1.5.4 Correct any errors or omissions and click the **OK** button.
- 4.1.6 Check the document line spacing.
  - 4.1.6.1 Highlight a section of text within the body of the document.
  - 4.1.6.2 Click **Format, Paragraph**. The Paragraph dialog box will open.
  - 4.1.6.3 Click the Indents and Spacing tab.
  - 4.1.6.4 Check to ensure that all fields are properly completed.
    - 4.1.6.4.1 For regular sections, the Spacing Before field should be set at “6 pt” and the Spacing After field should be set at “0 pt”.
    - 4.1.6.4.2 For whole number section headings, the Spacing Before field should be set at “12 pt” and the Spacing After field should be set at “0 pt”.

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- 4.1.6.4.3 For sections preceding charts, graphs, diagrams or tables, the Spacing After field should be set at “6 pt”.
- 4.1.6.4.4 The Line spacing field should be set at “single”.
- 4.1.6.5 Correct any errors or omissions and click the **OK** button.
- 4.1.6.6 Delete any carriage returns used as line spacing in the document.
- 4.1.7 Check the header and footer.
  - 4.1.7.1 Scroll to the top of the document and double-click the header table. The header will come to the foreground of the document and the Header and Footer toolbar will appear.
    - 4.1.7.1.1 Check to ensure that all fields are properly completed.
      - 4.1.7.1.1.1 The FICTX logo will appear in the extreme left of the header table.
      - 4.1.7.1.1.2 The upper left cell of the header table should contain the document type (Procedure, Work Instruction etc.), and should be the same as the Category field of the Properties dialog box. The font size for this field should be 16 point bold, and the text should be left justified.
      - 4.1.7.1.1.3 The upper middle cell of the header table should contain: “Doc Number:” in bold, a six-digit document number, and “Page X of X”.
      - 4.1.7.1.1.4 The upper right cell of the header table should contain “Revision:” in bold and a single or dual letter code. If it is a new document it, it should contain “A”.
      - 4.1.7.1.1.5 The lower left cell of the header table should contain “Title” in bold and the document title. This should be the same as the Subject field in the Properties dialog box.
      - 4.1.7.1.1.6 The lower middle cell of the header table should contain “Prepared by” in bold and the name of the author. This should be the same as the Author field in the Properties dialog box.
      - 4.1.7.1.1.7 The lower right cell of the header table should contain “Effective Date” in bold and the date of the last revision for the document. If it is a new or revised document, it should contain “Pending”.
      - 4.1.7.1.1.8 Data in all fields should be in the Arial font, and, unless otherwise specified, 10 point.
      - 4.1.7.1.1.9 Headings in each cell of the title block should be left justified, and data in each cell should be center justified.

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- 4.1.7.1.2 There should be two carriage returns after the header table.
- 4.1.7.2 Without closing the header, scroll to the bottom of the first page to view the footer.
  - 4.1.7.2.1 The footer should read “Controlled Only When Stamped in Red” and be in 10 point Arial font.
- 4.1.7.3 Correct any errors or omissions and click the **Close** button on the Header and Footer toolbar.
- 4.1.8 Read the document from beginning to end.
- 4.1.9 Check the body of the document.
  - 4.1.9.1 Check text formatting of the document.
    - 4.1.9.1.1 All fonts should be Arial.
    - 4.1.9.1.2 The title of the document should be 12 point bold underlined.
      - 4.1.9.1.2.1 Procedures should be all capitalized.
      - 4.1.9.1.2.2 Work instructions and training guidelines should be initial capitalized only.
    - 4.1.9.1.3 Primary headings and outline numbers should be 12 point bold initial capitalized only (i.e. **1.0 Purpose**).
    - 4.1.9.1.4 Specific managers, departments, or job titles named in the Responsibility section should be bold and initial capitalized only.
    - 4.1.9.1.5 Secondary headings and outline numbers should be 10 point bold initial capitalized only. (i.e. **4.1 Definitions**)
    - 4.1.9.1.6 Subsequent headings and outline numbers should be 10 initial capitalized only.
    - 4.1.9.1.7 All other text should be 10 point.
  - 4.1.9.2 Check computer input text formatting of the document.
    - 4.1.9.2.1 If a section step names a prompt or an icon, the name of the item should be printed as it appears in the program, and should not be bolded underlined or italicized unless that is how it appears in the program. (i.e. Click the FoxPro icon.)
    - 4.1.9.2.2 If a section step describes a message, that message, should be printed in quotation marks and should not be bolded underlined or italicized unless that is how it appears in the program. (i.e. You will receive the message “Report Complete!”.)
    - 4.1.9.2.3 If a section step names a dialog box, a message window, an error window, or a tab, the item should be printed as it appears in the program and should not be bolded, underlined, italicized, or in quotation marks unless that is how it appears in the program. (i.e. The Office Assistant dialog box will appear. Click the Sheet 1 tab.)

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- 4.1.9.2.4 If a section step requires you to type a specific command, the actual command or input should be bolded and in quotation marks. (i.e. At the C:\ prompt type “**setup**”.)
- 4.1.9.2.5 If a section step names a field to populate, a button, or a specific key or combination of keys to press the item should be bolded. (i.e. Press **Enter**. Click the **OK** button. At the **Name** field, enter your name. Press **Ctrl+ Alt+Delete** to reboot the system.)
- 4.1.9.2.6 Multiple actions that constitute a single command should be bolded and separated by commas. (i.e. Click **Start, Find, files or folders**.)
- 4.1.9.2.7 If a section step requires the user to supply information, the requested information is not bolded. (i.e. At the **Department Name** prompt, enter your department.)
- 4.1.9.2.8 The word Desktop (if referring to a computer Desktop) is always capitalized. (i.e. From the Desktop, double-click the Microsoft Word icon.)
- 4.1.9.2.9 Double-click is always hyphenated.
- 4.1.9.2.10 Pull-down is always hyphenated.
- 4.1.9.2.11 Directory paths are not bolded unless they are part of actual command names. (i.e. Type “**dir C:\data\temp\\***”.)
- 4.1.9.2.12 Use the word “click” to indicate action taken using the mouse. (i.e. From the Close Program dialog box click the **End Task** button.)
- 4.1.9.2.13 Use the word “press” to indicate action taken using the keys of the keyboard. (i.e. Press the **F6** key.)
- 4.1.9.2.14 Use the prepositions “at”, “from”, or “in” to indicate where a step or action begins. (i.e. At the **Department Name** prompt, enter your department. From the Desktop, click **File**. In the **Name** field, enter your name.)
- 4.1.9.2.15 Use the words “dialog box”, “message window”, “error window”, or “tool bar” instead of “pop-up window” or “pop up box” to describe boxes or windows that appear within a program.
- 4.1.9.3 Correct any errors or omissions.
- 4.1.10 Check the document content.
  - 4.1.10.1 Check the Purpose section of the document.  
The Purpose section should clearly and concisely explain the reason that the document exists and may state when it applies. It should also reference First International Computer of Texas, Inc. (FICTX).
  - 4.1.10.2 Check the References section of the document.

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The References section should list any other documents that are named in the document or that may be required to understand the document. References may include procedures, work instructions, forms, logs, charts, or external documents.

4.1.10.3 Check the Responsibility section of the document.

The Responsibility section should contain the title of the manager(s) of the department(s) responsible for assigning responsibility and revising the document.

4.1.10.4 Check the Procedure section of the document.

4.1.10.4.1 General, Definition, and Equipment sub-headings if present should appear under the Procedure section. These sub-headings may contain information required to understand the document or procedure, and if present should appear in the above listed order.

4.1.10.4.2 The Procedure section should follow a logical sequence of operations to achieve the result stated in the Purpose section of the document.

4.1.10.4.3 The Procedure steps should answer who, what, when, where, why, and how the procedure is accomplished.

4.1.10.4.4 The Procedure steps should result in an expected outcome or outcomes and disposition.

4.1.10.5 Check the grammar, spelling, punctuation and capitalization of the document.

4.1.10.5.1 All procedures, work instructions, and training checklists should follow accepted rules of English grammar, spelling, punctuation and capitalization as well as specific FICTX conventions. See the "Check computer input text formatting of the document" section above and the document **Quality Management Systems Definitions/Vocabulary** for specific FICTX grammar and text formatting conventions.

4.1.10.5.2 The titles of documents that are referenced should appear in the same format as they appear on the actual document referenced, but should be in 10 point Arial Bold.


4.1.10.6 Correct any errors or omissions.

4.1.11 Check any tables, diagrams, flow charts or pictures in the document.

4.1.11.1 These items should be included if they provide information essential to complete the procedure (as in a table of part numbers), or if they significantly increase the reader's understanding of the document or procedure.

4.1.11.2 Correct any errors or omissions.

4.1.12 Check the outline numbering format of the document.

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4.1.12.1 Primary (level one) outline numbers begin with whole numbers followed by a decimal point and zero (i.e. 4.0). Secondary (level two) outline numbers are indented five spaces (1/2") and add a number after the decimal point (i.e. 4.1). Subsequent levels of outline numbers are indented five spaces and add an additional decimal point followed by a number (i.e. 4.1.1, 4.1.2 etc then 4.1.2.1, 4.1.2.2 etc.). See **Preparation & Revision Guidelines for Procedures & Work Instructions** for examples of outline numbering.

4.1.12.2 Single sections under a heading should not be numbered.

4.1.12.3 Check to ensure that there is a page break at the end of the Procedure section before the Change Record section.

4.1.12.4 Outline numbering should be automatic and not typed in.

4.1.12.5 Correct any errors or omissions.

4.1.13 Check the Change Record section of the document.

4.1.13.1 Scroll to the bottom of the document and click the Change Record table.

4.1.13.2 Check to ensure that all fields are properly completed.

4.1.13.2.1 The words Change Record should be centered above the table and be in the 12 point Arial bold font.

4.1.13.2.2 The upper extreme left field of the Change Record table should contain "Revision".

4.1.13.2.3 The upper middle left field of the Change Record table should contain "Description of Change".

4.1.13.2.4 The upper middle right field of the Change Record table should contain "Date".

4.1.13.2.5 The upper extreme right field of the Change Record table should contain "Requestor Name".


4.1.13.2.6 All text in the header of the Change Record table should be in 10 point Arial bold font.

4.1.13.2.7 The information in subsequent rows on the Change Record Table should be in 10 point Arial font.

4.1.13.2.8 The "Revision" field of the Change Record table should match the "Revision:" in the header table.


4.1.13.2.9 The "Description of Change" should be a short sentence describing the reason for the revision and should reference the Engineering Change authorizing the revision. In the case of new documents, the "Description of Change" should say "Initial Release".

4.1.13.2.10 The "Date" field of the Change Record table should be the same as the "Effective Date:" field in the header table.

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4.1.13.2.11 The "Requester Name" field of the Change Record table should be the same as the "Prepared by:" field of the header table.

4.1.13.3 Correct any errors or omissions.

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### Change Record

Revision	Description of Change	Date	Requestor Name
A	Initial Release	05/06/02	B. Brah