Style Manual and Document Quality

Guide on the process of sponsoring a document and how to prepare documents

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Date: 9 December 2014
Overview

• As the front sheet indicates, there are two parts of this workshop:
  – The process of developing a document from initiation through publication
  – How to prepare a document using the rules mandated in the SAE Style Guide

• One important point to make at the start of this presentation is that all the SAE documents are produced through a consensual process. This means that it is required to get agreement of the contents of each document by the A-6 committee and the applicable sub-committee.
Agenda

• Run through the process of sponsoring a document
• Go through the process of preparing a document
General

• There are two key documents that provide the guidance on how to sponsor/prepare a document
  – Committee A-6 Policies & Procedures
    • This provides clear guidance on how to sponsor a document
  – SAE Style Guide
    • This provides all the editorial rules for SAE documents

• Both documents look intimidating, but are well written and are easy to read/follow and provide a lot of really useful information
How to Sponsor a Document

• Project Initiation

• There are two ways to sponsor a document:
  – Update of an existing document
  – Create new document

• Although they start off differently, the process of sponsoring the document through completion is the same

• The process is as per the flow chart in the A-6 Policies & Procedures document
How to Handle Comments

• The process of working through comments on your draft is critical to the development of a good standard

• First Point – don’t be proud – the document may be your pride and joy but adopt a mind-set of actively addressing comments

• Second point – openness and transparency in handling comments

• Third Point – Wherever possible, get agreement with the person who made the comments, including those comments that you don’t agree with
  – If not, a consensus within the committee has to be obtained
How to Handle Comments (Contd.)

• As I mentioned, openness and transparency is critical to the development of standards

• I use the following techniques:
  – Produce a document that lists all the comments and the disposition of them
  – Produce a document that lists all the changes from one version to the next
  – Highlight any changes in the next draft
Help to Develop a Document

• When you are developing a document, you are not doing it alone
• There is a lot of support within the A-6, so please be encouraged to use it
• For example:
  – Panel breakout sessions
  – Web meetings for example
  – Have a co-sponsor
How to Prepare a Good Standard

• There are five elements that I consider should be undertaken as part of the preparation of a good SAE document

  1. Follow the SAE Style Guide Rules
  2. Understand the requirements of some of the sections
  3. Use the embedded styles in the SAE templates
  4. Make the document user friendly
  5. Make a thorough review of the document before sending it out for ballot, either by yourself or by a peer
SAE Style Guide Rules

• Prior to starting a document, it is strongly advised to read the Style Guide

• Although it looks daunting, most of the key points are in the first 4 sections – 18 pages in total!

• These provide:
  – General requirements
  – Sectional requirements
  – Editorial requirements
  – General considerations
SAE Style Guide Rules (Contd.)

• The rest of the document provides supporting information such as:
  – List of frequently used references
  – A list of those abbreviations which are to used when applicable
  – Inserting change bars manually
  – How to insert the table of contents automatically
  – The formatting of Microsoft equations
  – Default settings for track changes
SAE Mandatory Contents

• All our documents are required to have the following:
  – Rationale
  – Scope
  – References (provided that there are some)
    • If there are, then:
      – Applicable Documents section required
      – SAE documents referenced first, then remaining in alphabetical order
  – Notes
  – Prepared by Statement – for A-6 documents
SAE Optional Contents

Everything else is optional, including:

- Foreword
- Table of Contents
- Purpose, Field of Application, Product Classification
- Related Publications, Definitions, Symbols, Terminology
- Appendices
Requirements of Some Sections

• Rationale
  – This shall only state the reason why the document has been written, revised, cancelled or made non-current.
  – Should be no more than two sentences
  – Take care not to confuse it with the Scope

• Scope
  – Shall briefly describe only the applicability of the document. I would suggest no more than two sentences.
  – Shall repeat the item name and its modifiers as shown in the title

• Notes
  – Shall include SAE mandatory text
Use of Embedded Styles

• The SAE AS, ARP and AIR templates all use embedded styles.
• This makes the document production easy to use and to maintain a consistent format.
• For example, there is no need to manually insert paragraph numbers because the style for the heading automatically insert the numbers.
• In addition, if you want to add a Table of Contents, this is automatically generated for you using the method described in the Style Manual.
Which Embedded Styles Should I Use?

• The main style that is used is body – this is normally used for all the text that is not for paragraph headings, figure numbers, etc.

• For Paragraph numbering, use the Heading styles:
  – Heading 1 – e.g. 1. SCOPE – the style automatically lists the paragraph number and converts the text to upper case.
  – Heading 2 – e.g. 2.1 Applicable Documents – the style automatically lists the paragraph number.
  – Heading 3 – e.g. 2.1.1 – SAE Publications
  – And so on down to Heading 6.

• For paragraph headings in the Appendices, use the equivalent AHead 1, etc.
Which Embedded Styles Should I Use (Contd. #1)?

• For Figure numbering, use the Heading 7, FIGTITLE style - the style automatically centers the text and converts the text to upper case. You have to write FIGURE x – etc.

• For Table numbering, use the Heading 8, TTITLE style - the style automatically centers the text and but doesn’t convert the text to upper case. You have to write TABLE x – etc.

• For text using bullets, use the BulletList style – the style adds the bullets and tabs the text.
Which Embedded Styles Should I Use (Contd. #2)?

• For text which is a listing starting with a, b, c, etc, then use the OrdList style
  – The technique that I use is to write the list using the body style, including the tab. Once the text has been completed, highlight the text and then apply the OrdList style.

• Use the style DocList for the listing of documents in section 2.
  – I would suggest using the same technique as for the OrdList style.
Which Embedded Styles Should I Use (Contd. #3)?

• Use the style TOCTitle for the Table of Contents - the style automatically centers the text and converts the text to upper case.

• Use the style TOC 1 for the contents listing of the TOC. - the style automatically aligns everything correctly and implements the correct tab formats. I personally add a line between each heading level 1 just to make it look easier to read, but this isn’t mandatory.
Which Embedded Styles Should I Use (Contd. #4)?

• Use the style PREPAREDBY for the Prepared By text. The style automatically centers the text and converts the text to upper case.
  – For all A-6 documents, the following text is to be used, adding the applicable panel details:
    • “PREPARED BY SAE PANEL A-6XX, XXXX PANEL OF COMMITTEE A-6, AEROSPACE ACTUATION, CONTROL AND FLUID POWER SYSTEMS”

• When a NOTE is required, use the CallOutNote style.
  – Again, I would suggest using the same technique as for the OrdList style.
Equations

- When a equations are written in the document, the following are to be used:
  - For the equations themselves, use the Microsoft Equation object.
  - In terms of the format of the equations, the Style Guide has specific settings that are to be used.
  - The Equation style is used to format the associated text, for example (Eq. 1) and move the text by tabs to the RH side of the page after the equation.
Tables

- Use the Microsoft table feature for creating all tables.
- The style to be used is Cellbody.
- If needed, align the text in the table using the center alignment button
Spell Checking

• Highlight entire document (Control A)
• Click on Review tab at top of screen
• Click on Language
• Choose Set Proofing Language
• Be sure English (U.S.) is highlighted in blue
• Be sure there is NOT an X in Do not check spelling or grammar
• Click on OK
• Will look like this
Making the Document Reader Friendly

• The documents that we put together are intended to be read by someone else, so it would seem to be advisable to make every effort to make the documents readable in such a manner that it is easy for the information to be communicated to the reader.

• Therefore, I would suggest the following:
  – Order the figure numbers and table numbers sequentially.
  – Locate the figures and the tables as close to the text where they are first mentioned so the reader doesn’t have to go far in the document to look at the figure or read the table.
  – Be consistent in your spelling and terminology, for example:
    • O-rings or o-rings – one or the other;
    • “Undercarriage” or “Landing gear”.

Revision 2.1
Making the Document Reader Friendly (Contd. #1)

– If you get to heading 5 or 6, then I would suggest restructuring the document – look to see if it is possible to break the document up into more top-level sections.

– Break up long paragraphs to make them easier to read.

– Break up long sentences to make them easier to read.

– Use bullets or a numbered list instead of having a list of items that follow each other separated by a comma, for example:

  This is to ensure that all irregularities of the hydraulic system are captured, the likelihood of bogus messages is low and the information is provided in an understandable format.

This is to ensure that:

• All irregularities of the hydraulic system are captured,
• The likelihood of bogus messages is low,
• The information is provided in an understandable format.
Review of the Document

- Prior to sending a document up for ballot, the A-6 policy requires that the applicable checklist that is available on the panel web page is to be used.

- The applicable checklist to be used is:
  - For the first draft of a new checklist, use “Checklist for New Document”
  - For the first draft of a revised document, use “Checklist for Revised Document”
  - If comments have been made on a previous draft, use “Checklist for Changes Made as a Result of Ballot”