

Operations Process

Communication Function

Standards for Documentation Management



Document S002

Version 04

March 14, 2001

Title

Standards for Documentation Management

Document: S002 Version: 04

Original Publication Date: August 16, 2000

Current Document Date: March 14, 2001

Changes and Improvements

All documentation is subject to ongoing revision which reflects changes in procedures, process, technology and quality. All online documentation is considered to be most current. Printed documentation is considered obsolete effective from the time of printing.

Responsibility

It is the responsibility of the user of this documentation to ensure that the most current version is being applied.

Marks and Symbols

All trade names or symbols used in this documentation are the property of the respective copyright holder.

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Contents

| | |
|---|----|
| 1.0 Purpose..... | 3 |
| 2.0 Scope..... | 3 |
| 3.0 Definitions..... | 3 |
| 3.1 General Conventions..... | 4 |
| 4.0 Document Layout Procedures..... | 5 |
| 4.1 Quality Assurance Standards Documents..... | 5 |
| 4.2 System Management Reports..... | 8 |
| 4.3 System Management Documentation/Procedures..... | 12 |
| 5.0 Related Documents..... | 15 |
| 6.0 Quality Records..... | 15 |
| 7.0 Ownership and Approval..... | 15 |
| 8.0 Revision History..... | 15 |

1.0 Purpose

These standards define the layout and publication of documents for the quality system and for all system-related documents. This ensures that all documents will have a consistent format, can be quickly recognized and will be easy to use.

2.0 Scope

Style, spelling and punctuation will follow the standards described in *The Ready Reference Handbook, Canadian Edition* and *The Gage Canadian Dictionary*. All personnel involved in developing or revising documents will follow the defined template, styles, elements and format. Document production and revisions will be validated and recorded.

3.0 Definitions

| | |
|----------------------------|---|
| 12/13 | First number indicates font size in points, second number indicates line spacing in points. |
| Dpi | Dots per inch, indicating the resolution of printed or visual materials, high dpi ratings result in a higher quality print. |
| Disks | Storage space within a computer system is made up of a number of physical disks. These disks can be partitioned or otherwise adjusted into a number of 'physical' or 'logical volumes'. These can be further formatted to contain 'file systems'. |
| gutter margin | Extra space left on the inner edge of pages to allow for binding or hole punching. |
| Kerning | Spacing between letters in a word. |
| Midrange/Unix Services | The floor is referred to as 'Midrange/Unix Services' and is called a 'Division'. It is headed by a 'Division Manager'. The 'Division' is divided into 'Departments' headed by 'Department Managers'. Departments are divided into 'Teams' headed by a 'Team Lead'. Teams are divided into 'Groups' headed by a 'Prime'. |
| Node | Use of this term should be evaluated on a case-by-case basis. |
| PDF | Portable Document Format. |
| Policy | Not to be used in any procedures manual unless approved by the Infrastructure Team Lead. |
| Recto | The right-hand page in an open book, normally having an odd page number. |
| SIR | System Information Repository (used for System Management Documentation). |
| styles | Rules of punctuation, layout and use of fonts. |
| System | Computer systems can take on a variety of roles and configurations, such as a 'workstation', 'client', or 'server', and are sometimes referred to as machines or by other terms. In order to achieve consistency, the term 'System' will be used to refer to a specific named collection of equipment. |
| template | A standardized method of creating documents so that they are all the same in appearance and layout. |
| TELUS | Whenever noted anywhere in documentation, the TELUS name should be printed in capital letters in order to protect its copyright. |
| TELUS Enterprise Solutions | No acronym exists for this organization. The full name needs to be printed wherever it is referenced. |
| TNR | Times New Roman. |

| | |
|-------|--|
| TOC | Table of contents. |
| verso | The left-hand page in an open book, normally having an even page number. |

3.1 General Conventions

3.1.1 Writing and Editing

Writing will conform to good grammatical and structural techniques. Spelling will conform to standard Canadian English. Use informative vocabulary and focus on the subject. Eliminate unnecessary words that do not provide any additional value to the information that you are trying to convey. Do not assume that the reader understands technical or organizational terms, acronyms or short-forms. These should be defined within the text or be addressed in an appendix.

All documents will be peer-reviewed for consistency and expert-reviewed for accuracy and legibility. All documents will be copy-edited for consistency, conformation to style, spelling and grammar before release. Do not use software spell-checking or grammar-proofing tools, as they are not an accurate method of locating and correcting errors. Do not use find-and-replace unless you check each replacement manually.

NOTE: Application of style and method can be found using the *S001 Quality Manual Level A* as a sample.

Templates must be used in all instances to facilitate conversions to HTML format and for conversion to PDF format using Adobe Distiller options.

Conventions used in this manual include but are not restricted to the following. Always check the date on this document to ensure that it is the most recent version.

3.1.2 Numbering

Numbering will follow these conventions:

- always spell numbers that begin sentences
- spell out numbers from one to ninety-nine, including zero
- hyphenate numbers from twenty-one to ninety-nine
- to avoid confusion, use Arabic numerals in parentheses following written numbers, for example two (2)
- use figures for numbers of more than two words, for example 1,000 not one thousand
- use commas to separate groups of three digits in standard system numbers
- use a single space to separate groups of three digits in metric system numbers, a comma or space is optional in four digit numbers
- always use numbers for time if it includes the designation “a.m.” or “p.m.”, otherwise, spell out the time
- enter time relative to a twelve-hour clock, for example, 11:00 a.m.
- when estimating, use an appropriate number of significant figures, for example, do not use 235.937, use 236

3.1.3 Spacing

Spacing will follow these conventions:

- no space between bullet lists and the introductory paragraph
- no space between bullets
- one (1) space between previous paragraph and numbered list
- one (1) space between each item in a numbered list
- single space between paragraphs
- styles are designed for two (2) spaces following the item number
- using one (1) or two (2) spaces following terminal punctuation (periods) or list punctuation (colons) is optional
- automatic table of content spacing is pre-set, but the table should be spaced as required to fit the page

3.1.4 General

The following general conventions will be observed:

- insert graphics between paragraphs or at the end of a section, never in the middle of a paragraph
- all text will be flush left, ragged right, do not justify
- tables will be inserted in the same manner as with graphics
- graphics will be sequentially numbered, with description and matching text reference, numbering bold, description normal
- use abbreviations, acronyms and symbols consistently throughout the document, for example, use MB or Mbytes, but not both
- use uppercase 'B' when referring to Bytes and lowercase 'b' when referring to bits, for example MB or GB for megabyte and gigabyte and Mb or Gb for megabits or gigabits
- date format for identification purposes will be the month in full, one (1) or two (2) digits for the day, and four (4) digits for the year

4.0 Document Layout Procedures

The standards in the following sections should be applied to each specific type of document.

The following sections apply to:

- *4.1 Quality Assurance Standards Documents*
- *4.2 System Management Reports*
- *4.3 System Management Documentation/Procedures*

4.1 Quality Assurance Standards Documents

All standards manuals will conform to the following specifications. For information on developing and revising standards documents, see *S008 Standards for Improvement Management*.

4.1.1 Document Layout

The document is designed for traditional, two-sided, hard-copy printing.

Observe the following for the cover page:

- no header or footer, no page numbering
- document title, middle, top
- division name, middle
- document number (without revision number), bottom, centre
- date entered as automatic update, bottom, centre

Observe the following for the cover verso page:

- no header or footer, no page numbering
- document title
- document number and version
- origination date (entered manually)
- current document date (use “enter date” function, select update automatically)
- changes and improvements disclaimer
- user responsibility disclaimer
- trademarks and symbols recognition
- copyright and reproduction information

Observe the following for the contents page:

- header containing “Document” or “Form” followed by the number and the date one line below on the outside edge of the page
- no footer
- start page numbering at “1”
- title “Contents”
- auto entry fields for TOC, headings 1-3, use template

Observe the following for the contents verso page:

- header containing “Document” or “Form” followed by the number and the date one line below on the outside edge of the page
- contents over-flow from the first page or left blank
- continuous page numbering

Observe the following for the body pages:

- page layout according to section *4.1.4 Page Layout*
- page numbering continuous
- first body text page on rectos
- headings and body text according to styles matrix
- all graphics embedded but not linked
- running heads containing “Document” or “Form” followed by the number and the date one line below on the outside edge of the page
- all dates to be entered as an automatic update field

All procedures, forms, checklists or other items relating to quality documents will use a consistent numbering system for easy identification as shown in the following table.

Version numbers will be used to indicate the version of the document and only apply to procedures (P) and forms (F). To avoid continuous editing and renaming of files relating to version changes, do not use the last two digits in the file name.

These two digits are for visual recognition and will only be used within the document. They will also relate to *Section 8.0 Revision History* within each document.

| Document Type | Document # | Version # |
|---|--|--|
| one letter | three digits | V and two digits |
| F = Form L = Library P = Procedure S = Standards | sequential numbers beginning with 001 | Version edition following main edition beginning with -V00 (documents and forms only) |

For example: F010-V03 = form number 010, Version 03

4.1.2 Page Layout

| | |
|---------------------|--|
| Standard paper size | 8.5" × 11" |
| Orientation | portrait |
| Layout | different odd and even, different first page |
| Margins | |
| Left | 1.0" |
| Right | 1.0" |
| Top | 1.0" |
| Bottom | 1.0" |
| Gutter | 0.25" |
| Header/Footer | 0.5" |

4.1.3 Document Styles

MSWord template name: QA Procedure.dot

| Body Text Styles | Description | Application |
|--------------------|---|--|
| Default paragraph | TNR 12/13, 100%, flush left, w/o control, body text | basic standard for all body text formatting |
| Normal | TNR 12/13, 100%, flush left, w/o control, body text | all basic body text, used under Heading 2 |
| Normal indent | TNR 12/13, 100%, indent left 0.5", w/o control, body text | first level indents, used under Heading 3 |
| Body text indent | TNR 12/13, indent left 0.75" | second level indents, used under Heading 4 |
| Body text indent 2 | TNR 12/13, indent left 1" | second level indents, numbered for headings, not numbered for text |

| Special Text Styles | Description | Application |
|----------------------------|---|---|
| Header | Arial 8/13, tabs 3" centred, 6" right flush | continuous running heads |
| Code | Normal + Courier 8/9, flush left | all code samples |
| CodeNI | Normal Indent + Courier 8/9 | used for code in Normal Indent |
| CodeBT1 | Body Text Indent + Courier 8/9 | used for code in Body Text Indent |
| CodeBTI2 | Body Text Indent 2 + Courier 8/9 | used for code in Body Text Indent 2 |
| Table heading | Arial 10/11 (B), centred, 2 before, 2 after | all table column or row headings |
| Table content | Arial 10/11, 2 before, 2 after, flush left | all table content (unless it would look better centred) |
| TOC 1 | normal, dot leader, 12 before | Heading 1 contents |
| TOC 2 | TOC 1 + indent left 0.25" | Heading 2 contents |
| TOC 3 | TOC 1 + indent left 0.50" | Heading 3 contents |
| TOC 4 | TOC 1 + indent left 0.75" | Heading 4 contents |
| Page number | Default paragraph font | automatic page numbering |

| Heading Text Styles | Description | Application |
|----------------------------|--|--|
| Heading 1 | Arial 16 (B) kern 14, centre, single, keep with next, level 1, next = normal | all main titles, included in TOC |
| Heading 2 | Arial 14 (B) single, keep with next, level 2, next = normal | all second level headings, included in TOC, for normal paragraph text formatting |
| Heading 3 | Arial 12 (B) single, keep with next, indent left 0.50", level 3, next = normal | all third level headings, included in TOC, used with Normal Indent |
| Heading 4 | TNR 12/13 (B), single, indent left 0.75", keep with next, level 7, next = normal | all fourth level headings, used with Body Text Indent |
| Heading 5 | TNR 36 (B), single, centred, keep with next, level 5, next = normal | all main cover formatting, not included in TOC |
| Heading 6 | TNR 18 (B), single, centred, keep with next, level 6, next = normal | all main cover formatting, not included in TOC |
| Heading 7 | not used | not used |
| Heading 8 | Arial 24 (B), single, flush right, keep with next, level 8 | contents page title |

4.2 System Management Reports

All System Management Reports will conform to the following specifications. For information on developing and revising standards documents, see *S015 Standards for Configuration Management*.

4.2.1 Report Layout

The document is designed for traditional, two-sided, hard-copy printing. A sample of this report is contained in library document *L013 Sample System Management Report*.

Observe the following for the cover page:

- no header or footer, no page numbering
- corporate logo of the customer
- document title
- reporting period
- “completed by” information
- date of the document
- document number

Observe the following for the cover verso page:

- no header or footer, no page numbering
- table of contents
- internal use statement

Observe the following for the body:

- page layout according to section *4.16 Page Layout*
- page numbering continuous
- first body text page on rectos
- headings and body text according to styles matrix
- all graphics embedded but not linked, inserted and not floating
- running heads mirrored to contain document name and information outside
- footer to contain centred page number

4.2.2 Report Templates

The report will consist of two (2) main sections, *Section 1.0 Executive Summary* and *Section 2.0 Capacity and Performance*, followed by appendixes.

Section 1.0 Executive Summary will include, but is not restricted to, the following sub-sections:

- 1.1 Overview
- 1.2 Tasks Completed
- 1.3 Service Issues and Requirements

The Overview sub-section will provide a brief description of the entire report.

The Tasks Completed sub-section will include system tasks that have been completed, consisting of, but not restricted to, a brief description of all changes, upgrades, revisions, installations or repairs to the system performed during the reporting quarter.

This sub-section will also include all database tasks that have been completed, including, but not restricted to, a brief description of maintenance, monitoring, studies, upgrades and revisions performed during the reporting quarter.

The Service Issues and Requirements sub-section will include all service issues and requirements, including the definition of unresolved issues, new issues that will affect service and completed processes and procedures performed during the reporting quarter. It will also include a brief description of recommendations for both software and hardware for the next quarter.

Section 2.0 Capacity and Performance will include a definition of specific terms and metrics related to hardware, software and databases. Information will be provided which relates to each specific system and will include, but not be restricted to, the following:

- a software and hardware level summary for each system including, but not limited to, a report for each CPU including CPU utilization, memory paging rates, disk space utilization, forecasts and recommendations.
- a database health summary for each database including a report of the growth for each database, buffer cache hit ratio and database sessions
- forecasts and recommendations for each portion

If the report consists of multiple systems, further sub-sections will be created to cover system specific information.

Appendix A will contain fixed configuration and database instance overview information. *Appendix B* will contain software and hardware level summaries. Additional appendixes can be added as required.

All customer reports will use a consistent numbering system for easy identification. Each report will receive a sequential number as the report is prepared.

The format will be RxxxC-xx, where:

| | |
|-----|----------------------------|
| R | = Report |
| xxx | = document number |
| C | = system management report |
| -xx | = version |

4.2.3 Page Layout

Refer to *Section 4.1.4* in this document.

4.2.4 Report Styles

MSWord template name: *New SMR.dot*

| Body Text Styles | Description | Application |
|-------------------------|---|---|
| Default paragraph | TNR 12/13, 100%, flush left, w/o control, body text | basic standard for all body text formatting |
| Normal | TNR 12/13, 100%, flush left, w/o control, body text | all basic body text |
| Normal indent | TNR 12/13, 100%, indent left 0.5", w/o control, body text | first level indents, not numbered |
| Normal indent 2 | TNR 12/13, 100% indent left 0.5" | second level indents, numbered |

| Special Text Styles | Description | Application |
|----------------------------|--|---|
| Header | Arial 8/10, outside | continuous running heads |
| Footer | TNR 12/13 centred | continuous footers |
| Table heading | Arial 8/11 (B), centred | all table column or row headings |
| Table content | Arial 8/11, flush left | all table content (unless it would look better centred) |
| TOC 1 | Heading 1 + TNR 12/13, no kerning, 12 before, 6 after, tab 6.0", dot leader | Heading 1 contents |
| TOC 2 | Heading 2 + TNR 12/13, no kerning, 6 before, 6 after, left 0.17", tab 6.0", dot leader | Heading 2 contents |
| Page number | TNR 12/13 | automatic page numbering |

| Heading Text Styles | Description | Application |
|----------------------------|---|---|
| Heading 1 | Arial 16 (B) kern 14, centred, single, keep with next, level 1, next = normal | main titles for sections, included in TOC |
| Heading 2 | Arial 14 (B) single, keep with next, level 2, next = normal | first level headings, included in TOC, for normal paragraph text formatting |
| Heading 3 | Arial 12 (B) single, indent left 0.5", keep with next, level 3, next = normal | second level headings, included in TOC |
| Heading 4 | TNR 12/13 (B), indent left 0.75", keep with next, level 4, next = normal | third level headings, not included in TOC |
| Heading 5 | TNR 36 (B), single, centred, keep with next, level 5, next = normal | main cover formatting, not included in TOC |
| Heading 6 | TNR 18 (B), single, centred, keep with next, level 6, next = normal | main cover formatting, not included in TOC |
| Heading 7 | Arial 24 (B), single, centred, level 7, next = normal | main cover formatting, not included in TOC |
| Heading 8 | Arial 24 (B), single, flush right, level 8, next = normal | "Contents" title, not included in TOC |

4.3 System Management Documentation/Procedures

4.3.1 Documentation Layout

The document should be designed for traditional, hard-copy printing.

Observe the following for the cover page:

- no header or footer, no page numbering
- document title, top, centre
- document number and Version number, bottom, centre
- date entered as automatic update, bottom, centre

Observe the following for the cover verso page:

- no header or footer, no page numbering
- document title
- document number and version number
- origination date (entered manually)
- current document date (use “enter date” function, select update automatically)
- changes and improvements disclaimer
- user responsibility disclaimer
- trademarks and symbols recognition
- copyright and reproduction information, bottom

Observe the following for the contents page:

- header, no footer
- start page numbering at “1”
- title “contents”
- auto entry fields for TOC, headings 1-3, use template

Observe the following for the contents verso page:

- contents over-flow from the first page or left blank
- continuous page numbering

Observe the following for the body pages:

- page layout according to section 4.3.6 *Page Layout*
- page numbering continuous
- first body text page on rectos
- headings and body text according to styles matrix
- all graphics embedded but not linked
- running heads to contain document number and date one line below document number on the out side
- all dates to be entered as an automatic update field

All documents will use a consistent numbering system for easy identification as shown below. Version numbers are used to indicate the version of the document. To avoid continuous editing and renaming of files relating to version changes, do not use the last two digits when saving the file. These two digits are only for version recognition and will only be used within the document.

| Document Type | Document # | Report Type | Version # |
|---------------|---------------------------------------|--------------------|--|
| One letter | Three digits | one letter | V and two digits |
| R = Report | Sequential numbers beginning with 001 | A = SMD D = SMP | Version edition following main edition beginning with -V00 |

Samples following this convention would include:

- R001A-V00 = report, document number 001, System Management Documentation, Version 00
- R001D-V01 = report, document number 001, System Management Procedures, Version 01

4.3.2 Page Layout

| | |
|---------------------|--|
| Standard paper size | 8.5" × 11" |
| Orientation | portrait |
| Layout | different odd and even different first page |
| Inner Margins | 1.0" |
| Outer Margins | 0.5" |
| Top | 1.0" |
| Bottom | 1.0" |
| Gutter | 0.0" |
| Header/Footer | 0.5" |

4.3.3 Documentation Styles

MSWord template names: New SMD.dot, New SMP.dot

| Body Text Styles | Description | Application |
|-------------------|---|---|
| Default paragraph | TNR 12/13, 100%, flush left, w/o control, body text | basic standard for all body text formatting |
| Indent 2 (Normal) | TNR 12/13, 100%, flush left, w/o control, body text | used under heading 2 |
| Normal Bold | Normal + bold | used for sub-headings |
| Indent 3 | TNR 12/13, 100%, indent left 0.5", w/o control, body text | used under heading 3 |
| Indent 4 | TNR 12/13, 100% indent left 0.75" | used under heading 4 |
| Indent 5 | TNR 12/13, 100% indent left 1" | used under heading 5 |

| Special Text Styles | Description | Application |
|----------------------------|--|---|
| Code 2 | Courier 8 single flush left | code under heading 2 |
| Code 3 | Code 2 + indent left 0.5" | code under heading 3 |
| Code 4 | Code 2 + indent left 0.75" | code under heading 4 |
| Code 5 | Code 2 + indent left 1" | code under heading 5 |
| Code Heading 2 | Courier 10 (B), single, flush left | heading for code 2 |
| Code Heading 3 | Code Heading 2 + indent left 0.5" | heading for code 3 |
| Code Heading 4 | Code Heading 2 + indent left 0.75" | heading for code 4 |
| Code Heading 5 | Code Heading 2 + indent left 1" | heading for code 5 |
| Header | Arial 8/10, outside | continuous running heads |
| Footer | TNR 12/13 centred | continuous footers |
| Table heading | Arial 8/9 (B), centred | all column or row headings |
| Table content | Arial 8/9, 2 before, 2 after, flush left | all table content (unless it would look better centred) |
| TOC 1 | Heading 1 + TNR 12/13, no kerning, 12 before, 6 after, tab 6.0", dot leader, flush right | Heading 1 contents |
| TOC 2 | TOC 1 + indent left 0.25" | Heading 2 contents |
| TOC 3 | TOC 1 + indent left 0.50" | Heading 3 contents |
| TOC 4 | TOC 1 + indent left 0.75" | Heading 4 content |
| Page number | TNR 12/13 | automatic page numbering |

| Heading Text Styles | Description | Application |
|----------------------------|---|---|
| Heading 1 | Arial 16 (B) kern 14, centred, single, keep with next, level 1, next = normal | main titles for sections, included in TOC |
| Heading 2 | Arial 14 (B) single, keep with next, level 2, next = normal | first level headings, included in TOC, for normal paragraph text formatting |
| Heading 3 | Arial 12 (B) single, indent left 0.5", keep with next, level 3, next = normal | second level headings, included in TOC |
| Heading 4 | TNR 12/13 (B), indent left 0.75", keep with next, level 4, next = normal | third level headings, included in TOC |
| Heading 5 | TNR 12/13 (B), indent left 1", keep with next, level 5, next = normal | fourth level headings, not included in TOC |
| Heading 6 | TNR 18 (B), single, centred, keep with next, level 6, next = normal | main cover formatting, not included in TOC |
| Heading 7 | Arial 36 (B), single, centred, level 7, next = normal | main cover formatting, not included in TOC |
| Heading 8 | Arial 24 (B), single, flush right, level 8, next = normal | "Contents" title, not included in TOC |

5.0 Related Documents

S008 Standards for Improvement Management
S015 Standards for Configuration Management
F001 Request for Change or Corrective Action
F011 Document Transmittal Form
F015 Revisions Log
F016 Document Transmittal Validation Log
F019 Procedures Development Form
F020 Review Cover Sheet
F031 Documentation Services Transmittal/Worksheet
F034 Procedure Review Record
L002 Using Adobe PDF Writer, Distiller and Catalog

6.0 Quality Records

All documentation must conform to the requirements of this manual. Records relating to the development and initiation of documentation will be recorded and filed using the forms listed above. All revisions will be recorded in the appropriate log.

A random selection of all documentation will be audited on a quarterly basis to ensure that they conform to the appropriate styles. Records and logs relating to the documentation procedures will be audited to ensure that correct entries are being made which accurately records the revision process.

7.0 Ownership and Approval

| Owner/Approver | Version | Approval Date | Implementation Date |
|----------------|---------|--------------------|---------------------|
| Jeff Richards | 00 | September 19, 2000 | September 19, 2000 |
| Irv Boichuk | 01 | September 29, 2000 | September 29, 2000 |
| Irv Boichuk | 02 | November 25, 2000 | November 25, 2000 |
| Irv Boichuk | 03 | January 9, 2001 | January 9, 2001 |
| Chris Boutin | 04 | February 14, 2001 | February 14, 2001 |
| | | | |

8.0 Revision History

| Version | Changed Sections | Revision Date | Tracking |
|---------|---|--------------------|----------|
| 01 | see log entry | September 29, 2000 | 1 |
| 02 | change naming conventions | November 25, 2000 | 5 |
| 03 | editing and revisions – company name change | January 9, 2001 | 7 |
| 04 | amalgamate D002, D004 and D015 | February 1, 2001 | 28 |
| | | | |