

Chapter 5 – Technical Documents

5.2 PROJECT MANUAL

5.2.3 PAGE FORMAT

INTRODUCTION

This subchapter deals with the formatting of the individual pages of the D&C master specifications and documents. The page format is organized, for the most part, in accordance with CSI Page Format. The current edition of CSI Page Format is in the CSI Manual of Practice binder (kept by Specifications QIT leader). A copy of CSI Page Format, modified to conform to D&C Policy, is also included in the CSI Manual of Practice binder.

The electronic versions of the D&C master specifications sections and documents have coding to provide the standard page format requirements. This coding covers such things as margins, font style, tab sets and footers. Each new specification section and document should begin on a new page. The first page of each section or document should have the section (or document) number and title centered on the top in all uppercase letters. The second and succeeding pages of the section or document begin with the text as continued from the preceding page, without any heading.

HEADERS

Headers are used in most master specifications and documents and generally contain information to identify the section or document as a D&C master, identify the author, identify the word processor, and identify the version for multi-version sections and documents.

- A typical header for a master section with different versions is shown below:

D&C PAA:lmm

BROADSCOPE/SHORT VERSION

- A typical header for a master section with only one version is shown below:

D&C JRC:sc

The header information must be deleted when a master is edited for a project.

Headers are generally not used in the final project specifications or documents. If a revised project section or document is issued the header is used to indicate the revised date. When a header is used the information is located flush to the right margin.

- A typical header for a revised project specification or document is shown below:

Revised September 25, 2007

Article headings are typed in uppercase letters and are never followed on the same line with text. Articles are addressed by a number (starting with .01) preceded by the Part in which the article occurs. No punctuation follows the article title.

Paragraph headings are typed in initial uppercase letters and may be followed on the same line with text. Paragraphs are addressed with uppercase letters. A colon (:) is the punctuation mark used to terminate a paragraph title. A paragraph may be a heading followed by text, or may be text without heading.

Sublevels of the paragraph may have headings in initial uppercase letters with text following on the same line. Tab settings for article and sublevel designations are preset in the coding in the section or document.

Examples of the levels and their addresses are:

PART 1 GENERAL

- 1.01 ARTICLE** (1st level)
- A. Paragraph: (2nd level)
- 1. Subparagraph: (3rd level)
- a. Subparagraph: (4th level)
- 1) Subparagraph: (5th level)
- a) Subparagraph: (6th level)

By maintaining the preset tab spacing set by the coding the spacing allows the use of double character addresses at any level. This allows use of numbers from 1 to 99 and the duplication of letters, although duplication of letters should not be necessary.

D&C policy is to not use the 5th and 6th levels unless absolutely necessary. Excessive use of sublevels is a sign of poor organization of the text. Frequent use of sublevels beyond the 3rd or 4th levels tend to indicate that the overall article or paragraph is too comprehensive and that breaking the article down into several topics is in order. Master text is particularly difficult to handle if too many sublevels are appended to a topic.

Though some specifications writers prefer not to write an article with only one paragraph under it, or a paragraph with only one subparagraph, there is frequent need for such practice, particularly in master specification writing. It is not uncommon to set up nearly empty categories in master specifications, for filling in according to project needs.

YELLOW HIGHLIGHTED TEXT

Items of information for the specifications writer (or processing person) are often included within the text of Master Specifications by means of editor's notes. The current word processing system allows editor's notes to be placed as yellow highlighted text. Yellow highlighted text is always omitted from project specifications. These items of information typed in bold uppercase letters and highlighted yellow. Yellow highlighted text must be manually deleted as a project specification is edited.

END OF SECTION

The end of each section is designated with END OF SECTION centered below the last line of the section text, preceded by a single line space. No End of Division designation is used.

SCHEDULES AND TABLES

The general, product, and execution headings of the 3-Part Format provide an adequate framework to organize all types of text.

Brief schedules and tables may be incorporated within the Parts. It is not necessary to hold rigidly to the indentation and addressing system used in the rest of the section.

The following format principles apply to schedules and tables within the specifications:

1. Except for large schedules or tables, avoid splitting an item in a schedule or table between 2 pages.
2. Repeat schedule or table headings when schedules run more than one page.
3. Use some form of initial address or line numbering, where space permits, to aid retrieval.
4. Unless absolutely necessary do not arrange items to read sideways on the page.
5. Consider which schedule and table information is better prepared separately from the formatted specifications text.

PRACTICES TO AVOID

Underlines should generally be avoided. Emphasis, in CSI Page Format, is achieved by capitalization, spacing and punctuation. The specification writer, by using key word product titles and descriptive imperative verbs, can add further emphasis. CSI Page Format works well with streamlined product specifying; the name of the product, followed by a colon, followed by the desired properties.

Special characters are not recommended for use in the Page Format. Roman numerals are not used to identify articles or paragraphs because of the difficulty they present in horizontal spacing, renumbering, and readability.

CONCLUSION

Use of the CSI Division and 3-Part Section Formats, among other advantages, reduces retrieval time. A universal Page Format reduces this time even further, since those who use specifications are no longer confronted with strange and widely different page arrangements. It also makes it easier for D & C specifications writers and consultants to achieve uniformity throughout the project specifications.

DEFINITIONS

Address: The total identification preceding a unit of text by which it can be retrieved. The term is used loosely to describe the characters immediately preceding the initial line of a paragraph; but

strictly speaking, the address of the full set of characters, starting with the specification number, which uniquely and completely identifies the unit of text.

Article: The level of specification text immediately following the Part, and preceding the paragraph. The major categories under each of the 3 Parts in CSI Section Format are articles.

Contents: The list of items provided in the project manual, including Division and section titles. It is to be distinguished from an index, which is a summary of subject matter topic location, evolved from the text and usually printed at the end.

Footer: The standard line running through a project manual at the bottom of each page of the section.

Justify: To space out text to fit a condition, ie: "left justify," to space out all the lines of text to begin in a straight line at the left margin and terminate in a staggered line at the right margin.

Project Manual: The term used by CSI and AIA for the booklet that contains the bidding and contract requirements and the specifications.

Retrieval: As used in this chapter, the ability to refer to, or to find, or to recover and manipulate a unit of text. Retrieval is generally accomplished, for a block of text, by use of an address, which identifies the initial line of the block and which governs all subsequent text until the next address of equal or higher order is encountered. D&C Master Specifications are retrieved from the storage media of the word processing system.

Revision History:

Rev	Date	Description	Reviewed by:	Approved by:
0	11/21/07	Last revised date		
1	04/13/15	Revised "hidden text" to "yellow highlighted text"	Parnett	Parnett