

INSTRUCTIONS FOR USING THE IEEE STANDARDS TEMPLATE IN *.DOCX

IEEE SA strongly recommends that you use the macro-enabled *.doc template for developing your draft, however, we recognize that there are two legitimate situations where this is not possible:

- a) Your organization does not allow macro-enabled documents on its servers.
- b) You are using the latest Mac OS which does not allow our macros to run.

The good news is that much of our styles are still available in a *.docx, and for those macros that do not work in a *.docx, there are relatively simple workarounds. Many of these workarounds refer to placeholders that are in the *.docx standard that will need to be copied upon first use. It is recommended that you retain unused placeholders if you think you might need them later. They can be left at the bottom of the draft and will not impact balloting as they can be removed editorially upon publication.

NOTE: Using CTL-V to paste styles does not work; you must right click at the location to paste to and paste using all formatting (not just text) in the menu.

Here are the workarounds for the various macro tab functions that have been disabled:

REQUIRED INFO



The Required Info tab no longer works. This means that this information will need to be entered manually:

Project Designation, Draft number, Title, Committee Name, Society Name:

There are four places you need to change this information:

Page 1 (you will not likely need to update this information later unless there is a PAR revision or an error was made in entering the data):

```
1 P<designation>™/D<draft_number>↵
2 Draft<Gde./Rec./Prac./Std.>·for·
3 <Complete·Title·Matching·PAR>¶
```

```
4 Developed by the¶
5 ¶
6 <Committee·Name>¶
7 of the¶
8 IEEE <Society·Name>¶
9 ¶
10 ¶
```

The header (with each revision, you will need to update the month and draft number):

```
P<designation>/D<draft_number>, <draft_month> <draft_year>¶
Draft <Gde./Rec./Prac./Std.>·for <Complete·Title·Matching·PAR>¶
```

The boxed text in the Introduction (with each revision, you will need to update the month and draft number):

▪ Introduction¶

```
This introduction is not part of P<designation>/D<draft_number>, Draft <Gde./Rec./Prac./Std.>·for <Complete·Title·Matching·PAR>·¶
```

The title on the “Overview” page (this likely only needs to be entered once):

1 Draft <Gde./Rec./Prac./Std.> for
2 <Complete Title Matching PAR>

3 ▪ 1. Overview

Participants:

Only two items on this page, likely to only need to be added once.

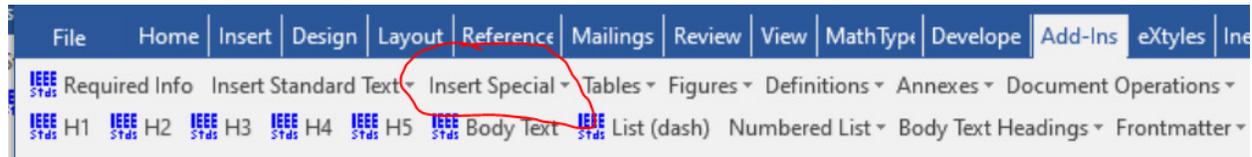
▪ **Participants**

At the time this draft <gde./rec./prac./std.> was completed, the <Working Group Name> Working Group had the following membership:

<Chair Name>, Chair
<Vice-chair Name>, Vice-Chair

INSERT STANDARD TEXT: These functions are not commonly used or are more easily available elsewhere.

INSERT SPECIAL



Bibliographic Entry:

If the drop-down option to add a bibliographic entry does not work, you can copy an existing entry (or the placeholder if you are using a clean template) and copy it elsewhere in the list. A new autogenerated number will be created and you can edit to copied entry.

Equation/Equation numbering: You can copy an existing entry (or the placeholder if you are using a clean template) and copy it elsewhere in the list. A new autogenerated number will be created and you can edit to copied entry.

Start Numbered List

Footnote

Add Table of Contents

These no longer work in a *.docx. Use the regular Word functions, taking care to follow the IEEE Standards Style Manual.

Note or Notes

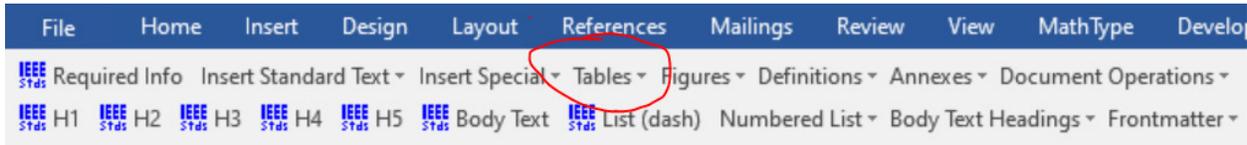
Caution/Warning: These no longer work in a *.docx. Mimic these styles in text:

NOTE—Text of note.

CAUTION

The Caution/Warning label is in all caps and bold. The text follows below after a soft return. The label and text is centered and boxed.

TABLES:



Insert Table: Use the regular Word function for adding a table.

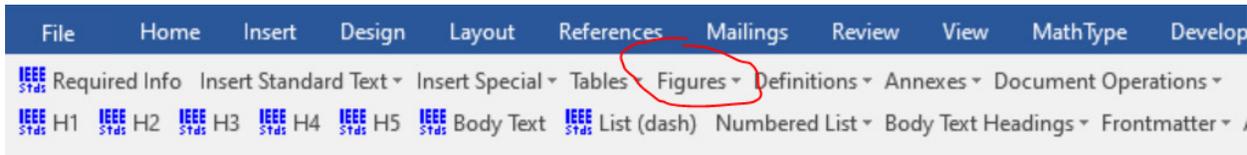
Regular/Annex Table Caption:

These functions no longer work. Copy an existing caption (or a placeholder in the clean template). The label will autogenerate and you can edit the text.

Convert Text to Table/Table to Text: These were shortcuts to regular Word functions. Use those.

Apply ...Style: All of the table data style functions in this dropdown menu STILL WORK in a *.docx.

FIGURES:



None of these functions work.

Insert a figure: Simply paste your graphic into Word.

Regular/Annex Figure Caption:

Copy an existing caption (or a placeholder in the clean template). The label will autogenerate and you can edit the text.

DEFINITIONS:



The definitions macros do not work in a docx. Follow the editorial style to manually format definitions (bold term, alphabetic order or terms, etc).

ANNEXES:



Insert Annex Title” does not work. Copy the placeholder annex title and edit.

“Apply Annex Heading Style” – these styling macros still work.

“Insert Bibliography Annex” does not work – retain the Bibliography shell from the template if not already existing.

“Insert Bibliographic Entry” – works, also under “Special” in the second row.

DOCUMENT OPERATIONS:



None of these macros work.

Update All Fields: This was a nice shortcut to update all linkable fields (headings, table/figure captions, equation numbers, numbered equation numbers), but you can still update all linkable fields by doing the following:

Press CTL-A simultaneously (selects all text in the document)

Press F9 – this will update all fields. (Select “Entire table”)

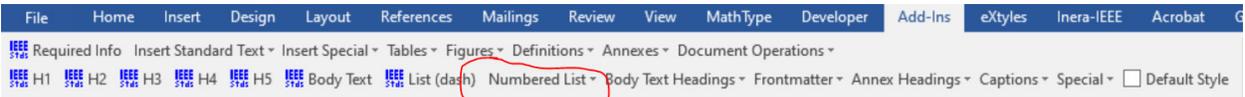
SECOND ROW BUTTONS:

H1..List (dash):



All of these styling macros work.

Numbered List:



This macro no longer works. Use regular Word functions.

Body Text Headings:



Same as the H1..H5 buttons, but includes four more levels (down to the ninth level).

Frontmatter:



You should not need these as the template already includes all of them (but they DO work).

Annex Headings:



- Annex Title (Heading 1): Do not use – copy from placeholder instead.
- Level 1 (Heading 2) .. Level 8 (Heading 9): Same as Annexes/Apply Annex Heading Style, but includes additional levels.

Captions:



None of these work. Copy from placeholder or existing captions if present.

Special:



All of these are duplicates of what is listed under Insert Special with the exception of “Computer Code” which still works: it sets the text as 10 pt Courier font. Note that any spacing or tabs may not be retained accurately and should be checked.

Default Style:



This is an artefact of an older version of the template and does not do anything.

Special:



- Bibliographic Entry (same as Insert Special/Bibliographic Entry): If the drop-down option to add a bibliographic entry does not work, you can copy an existing entry (or the placeholder if you are using a clean template) and copy it elsewhere in the list. A new autogenerated number will be created and you can edit to copied entry.
- Caution/Warning: These no longer work in a *.docx. Mimic these styles in text.
- Computer Code: sets text as Courier. CAUTION: spacing/tabs may not be retained.
- Footnote: does not work, use Word function
- Single Note or Multiple Notes: does not work, mimic style.
- Equation/Eq. Numbering: these macros do not work. You can copy an existing entry (or the placeholder if you are using a clean template) and copy it elsewhere in the list. A new autogenerated number will be created and you can edit to copied entry.
- Equation Variable list: this WILL correctly format a variable list.

Default Style:



A relic of earlier templates. Has no function.