

INSTRUCTIONS FOR USING THE IEEE STANDARDS TEMPLATE

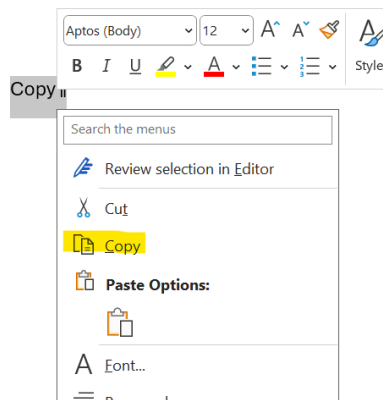
IEEE SA has replaced the macro-enabled (*.doc/*.docm) template for developing your draft. We have made this decision for the following reasons:¹

- a) Microsoft no longer supports macros in *.doc and *.docm formats.
- b) Many organizations do not allow macro-enabled documents on their servers.
- c) The latest Mac OS does not allow *.doc or *.docm files to be opened.

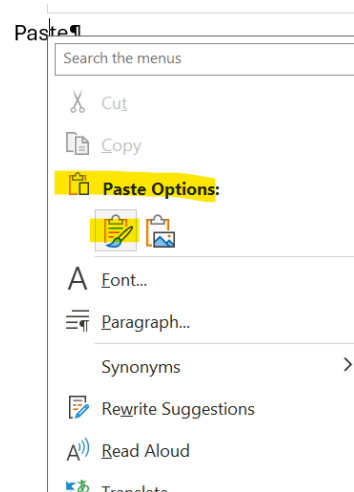
The good news is that many of our styles are still available in the AddIns menu in *.docx, and for those macros that do not work in *.docx format, there are relatively simple workarounds. Many of these workarounds refer to placeholders that are in the template that will need to be copied upon first use. 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 in *.docx; you must right click at the location to paste to and paste using all formatting (not just text) in the menu.

COPY



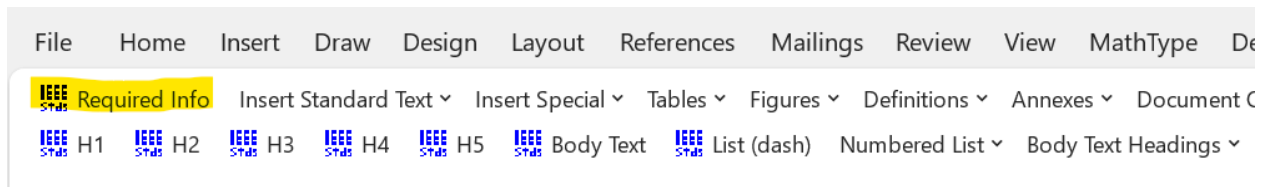
PASTE



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

¹ If you are currently working on a draft in one of our macro-enabled *.doc or *.docm files are in an environment where you can and want to continue to do so, you may reach out to sa_templates@ieee.org if you have any problems with your draft.

REQUIRED INFO

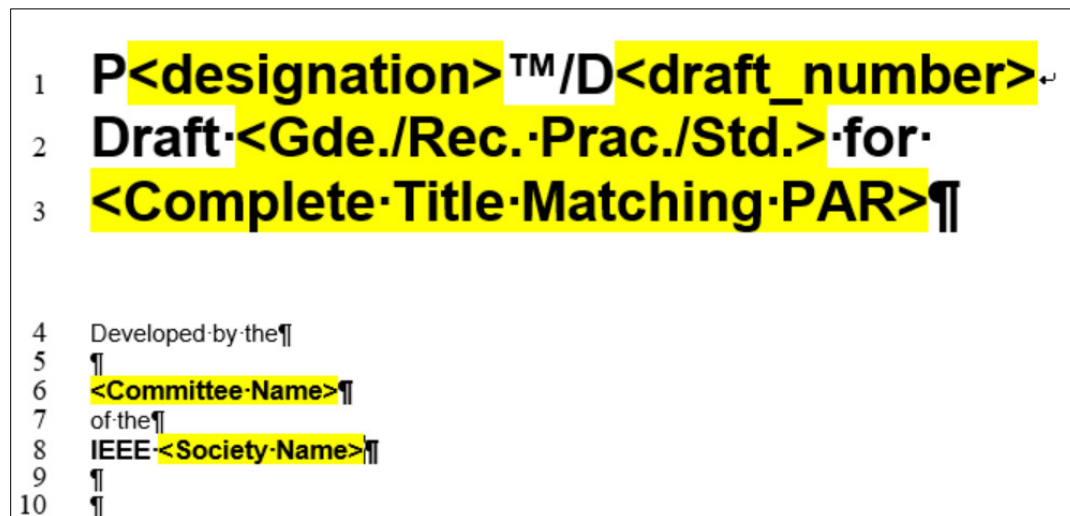


The Required Info does not work. This means that the following information will need to be entered manually:

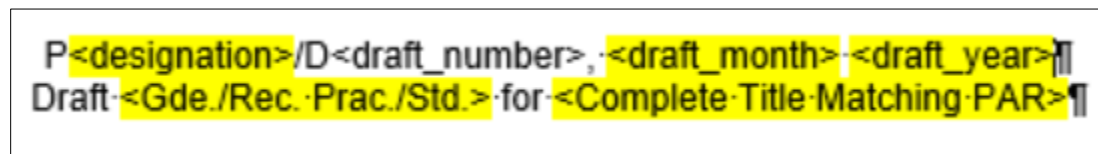
Project Designation, Draft number, Title, Committee Name, Society Name:

There are four places you need to change this information:

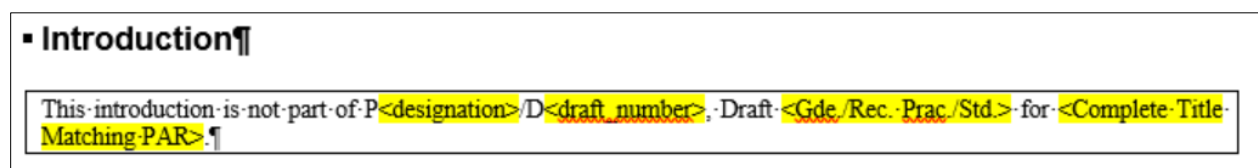
Page 1 (you will not likely need to update this information later unless there is a PAR revision or an error was made in entering the data):



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



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



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:

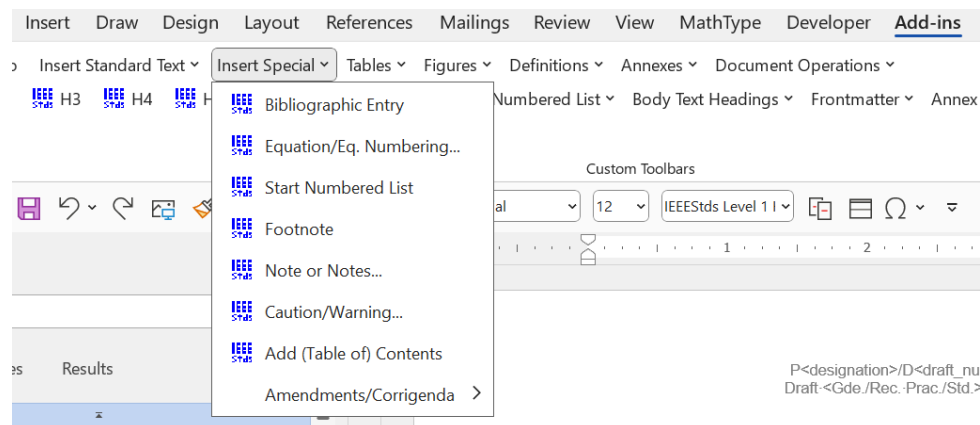
Only the type of standard, working group name, and chair and vice-chair names need to be added once.

▪ 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.

File	Home	Insert	Draw	Design	Layout	References	Mailings	Review	View	MathType	De
IEEE Std Required Info	Insert Standard Text	Insert Special	Tables	Figures	Definitions	Annexes	Document C				
IEEE Std H1	IEEE Std H2	IEEE Std H3	IEEE Std H4	IEEE Std H5	IEEE Std Body Text	IEEE Std List (dash)	Numbered List	Body Text Headings			

INSERT SPECIAL



Bibliographic Entry:

This generates a linkable (via cross-reference in the document) citation number for the reference following our style.

Equation/Equation numbering:

This 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 the copied entry.

Start Numbered List

Footnote

These do not work. Use the regular Word functions, taking care to follow the IEEE Standards Style Manual.

Note or Notes

Does not work. Mimic this style in text:

NOTE—Text of note. <Times New Roman 9pt>

Caution/Warning: Does not work. Mimic this style in text:

<p style="text-align: center;">CAUTION</p> <p style="text-align: center;">The Caution/Warning label is in all caps and 10 pt bold. The text follows below after a soft return. The label and text is centered and boxed.</p>

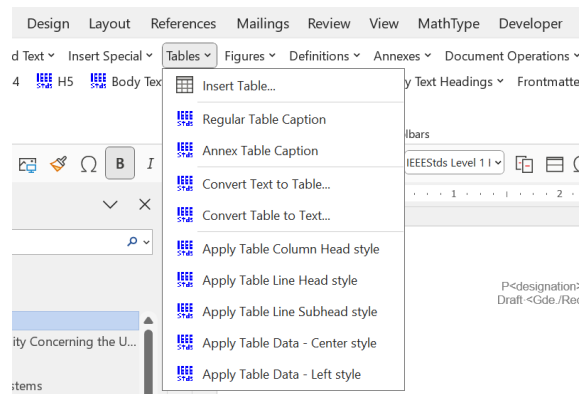
Add Table of Contents

This does not work. Use the regular Word functions, taking care to follow the IEEE Standards Style Manual.

Amendments/Corrigenda

This does not work. It was designed to insert amendment/corrigendum-specific editing instructions to the draft. These are already present in the Amendment/Corrigendum template.

TABLES:



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

Regular/Annex Table Caption:

Copy an existing caption (or a placeholder in the clean template). The label number will autogenerate and you can edit the text. (Note that the caption goes ABOVE the table.)

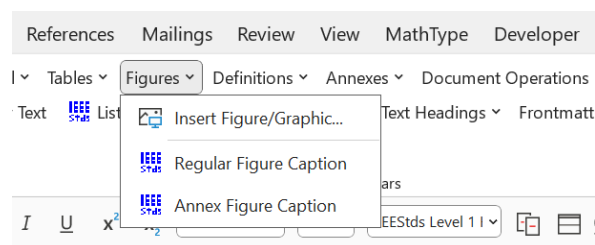
Convert Text to Table/Table to Text:

These were shortcuts to regular Word functions. Use those.

Apply ...Style:

All of the table data style functions in this dropdown menu STILL WORK. Choosing one of these styles for selected table text will apply proper styling.

FIGURES:



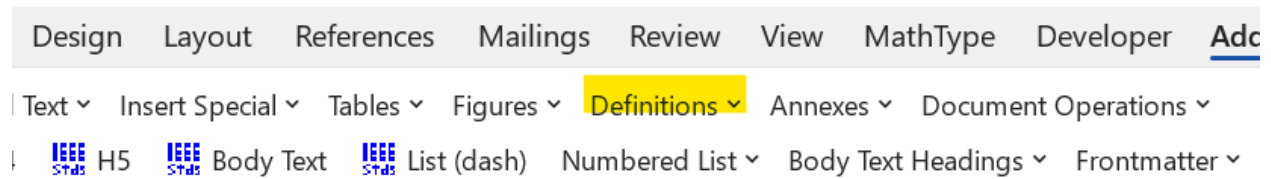
Insert a figure:

Does not work. Simply paste your graphic into Word.

Regular/Annex Figure Caption:

Does not work. Copy an existing caption (or a placeholder in the clean template). The label number will autogenerate and you can edit the text. (Note that the caption goes BELOW the figure.)

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. — See the placeholder in the template.

ANNEXES:



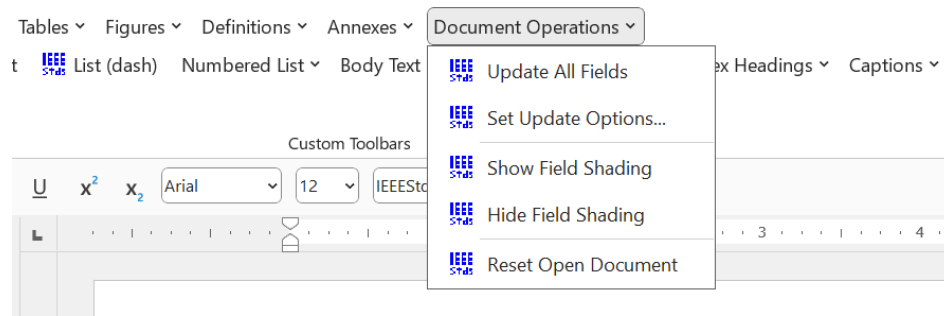
“Insert Annex Title” does not work. Copy the placeholder annex title and edit.

“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”)

Set Update Options:

Shortcut to apply updates without affecting header and title – no longer available.

Show Field Shading:

Shows updatable fields – this is active in the *.docx template (i.e., updatable fields are shaded).

Hide Field Shading:

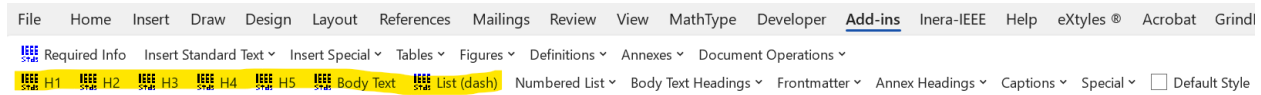
Turned off field shading – this was rarely used so the shading is left on by default.

Reset Open Document:

Artifact of the macro-enabled template – irrelevant.

SECOND ROW BUTTONS:

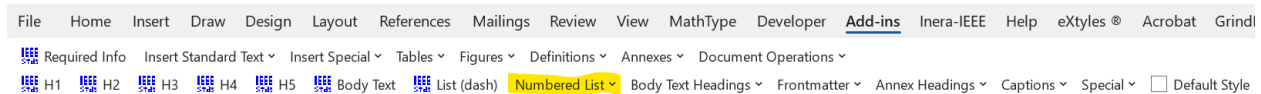
H1..List (dash):



All of these styling macros work:

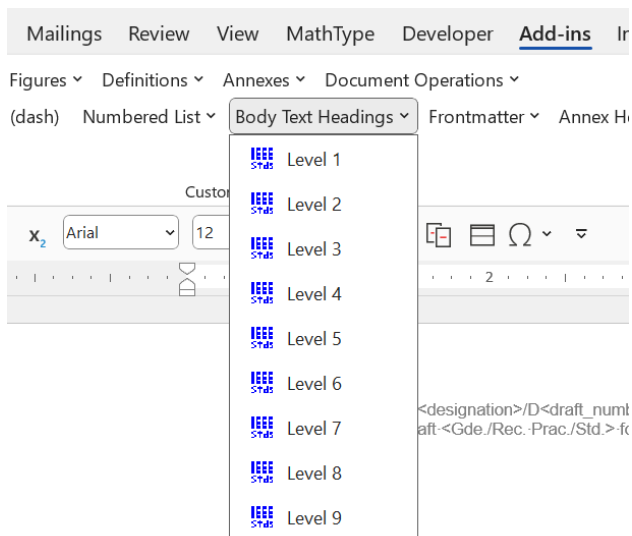
- H1...H5 – Applies heading styles 1 through 5.
- Body Text – Applies regular paragraph style
- List (dash) – Applies bullet (dash) list style.

Numbered List:



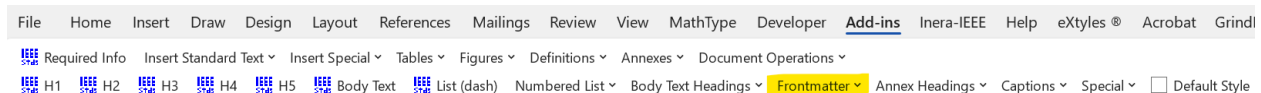
This macro no longer works. Use regular Word functions.

Body Text Headings:



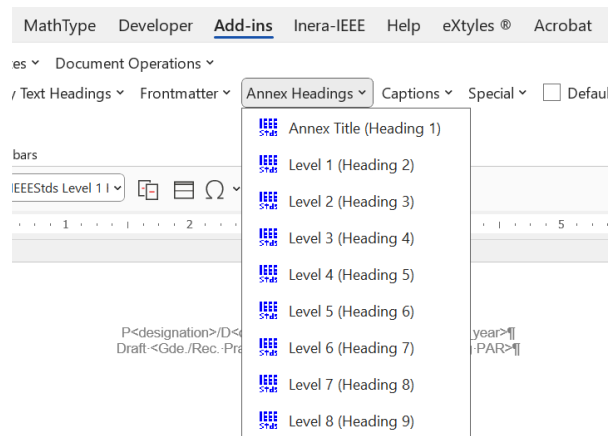
Same as the H1..H5 buttons, but includes four more levels (down to the ninth level).

Frontmatter:



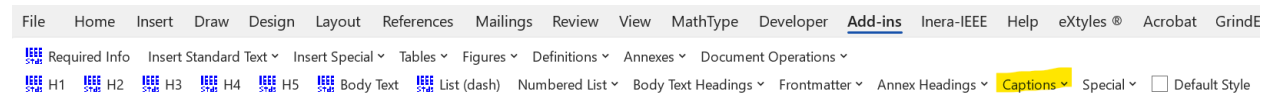
You should not need these as the template already includes all of them (but they DO work).

Annex Headings:



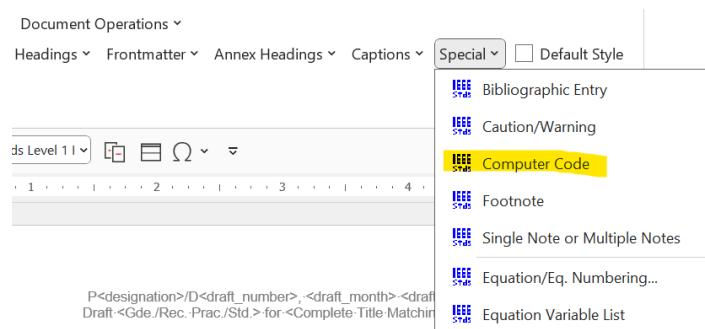
- Annex Title (Heading 1): Does not work correctly – copy from placeholder instead.
- Level 1 (Heading 2) .. Level 8 (Heading 9): Same as Annexes/Apply Annex Heading Style, but includes additional levels.

Captions:



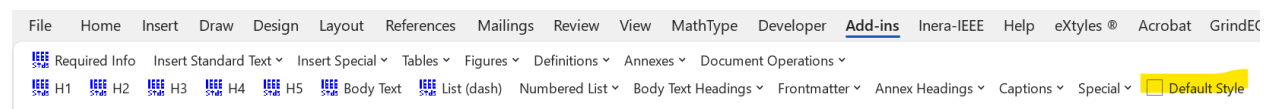
None of these work. Copy from placeholder or existing captions if present.

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 artifact of an older version of the template and does not do anything.