

Quick Tips on Using the IEEE-SA Word Template

1. Use the IEEE-SA Style Manual

The IEEE-SA Style Manual shows how drafts and final standards should appear (<http://standards.ieee.org/guides/style/>)

2. Fill In Required Info Fields

Do this as soon as possible (and whenever there are updates to these fields). Use Insert Standard Text → Required Info (fields) to add or repeat Required Info. This ensures consistency throughout the document.

3. Use the IEEE-SA Toolbars

Use formatting and inserting functions from the IEEEStdFormatting and IEEEStdTemplate toolbars to adhere to IEEE Standard style.

4. Copy and Paste

Use Ctrl+V then Return to quickly paste text from areas of the document that are correctly formatted, or when copying from another current copy of the template with correct formatting.

5. Use Number Functions

Do not manually add numbering! Numbering functions allow easy insertion and reordering of elements, such as list items, figures, tables, annexes, definitions, and equations. Numbering functions are also important when utilizing the master and sub-document convention. The following list of functions use automatic numbering:

IEEEStdFormatting toolbar	IEEEStdTemplate toolbar
H1 / H2 / H3 / H4 (buttons)	Insert Standard Text → Headings (menu)
Numbered list (menu)	Insert Special → Bibliographic Entry
Body text headings (menu)	Insert Special → Equation/Eq. Numbering...
Frontmatter → Frontmatter Headings → Level 1 (frontmatter only)	Insert Special → Start Numbered List
Annex Headings (menu)	Insert Special → Footnote
Captions (menu)	Insert Special → Note or Notes...
Special → Bibliographic Entry	Table → Regular Table Caption
Special → Footnote	Table → Annex Table Caption
Special → Single Note or Multiple Notes (numbering for multiple notes only)	Figure → Regular Figure Caption
Special → Terms+Definitions	Figure → Annex Figure Caption
Special → Equation/Eq. Numbering...	Definitions → Format/sort Terms+Definitions
	Definitions → Set/change numbering for Terms...
	Annexes (menu)

6. More About Numbering Functions

Numbering in sub-documents will be incorrect with reference to the full standard. Once all master and sub-documents are properly linked, numbering will be automatically corrected.

7. Use “Master Documents” for Large Drafts

For documents larger than 100 pages, or for standards development by multiple authors, the master and sub-document conventions described in *IEEE-SA Word Template for Drafts* documentation.

8. Use Automated Cross-Referencing

Use Word's Insert → Reference → Cross-reference... function. This method allows numbering and hyperlinks to change automatically if the element being reference is moved. Consult your *IEEE-SA Word Template for Drafts* documentation for help.

9. Never...

- **Never** use your own styles. Use those in the IEEEStdFormatting and IEEEStdTemplate toolbars.
- **Never** alter IEEE Standards styles. Altering IEEE Standards styles creates errors in the document, which delays the publication process. **If necessary**, contact your IEEE Standards editor to request a formatting variance for a specific purpose.
- **Never** add extra returns to increase line spacing. IEEE Standards styles define the required spacing.