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**SDLCforms**  
System Administrator's Guide  
Version 3.0

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Documentation Consultants'  
**SDLCforms**  
System Administrator's Guide

**[www.SDLCforms.com](http://www.SDLCforms.com)**



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## Revision History

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Date	Version	Author	Change
02-01-08	1.0	Ken Fass	Initial release.
08-23-11	1.1	Jim Hicks	Update document to reflect form changes.
09-19-11	2.1	Jim Hicks	Update document to add Word 2007/2010 maintenance.
08-04-14	2.5	Jim Hicks	Converted all Word document to new Styles.
11-25-15	3.0	Rebecca C.	Updated document to reflect addition of 30 new forms.

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## 1 Introduction

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This document is a Systems Administrator's Guide for adding, changing, and deleting information to Documentation Consultants' **SDLCforms** documentation.

### 1.1 Purpose

This Guide will help users modify their documentation, which includes information on the following topics:

- Document Properties
- Title Page
- Table of Contents
- Headers and Footers
- Document Format and Style
- Page Numbers

Note: This document is not intended as a training guide for either Microsoft Word or Excel. It will assist in modification of Microsoft 2007/2010/2013 version documents.

### 1.2 Audience

This document is intended for system administrators, analysts, and technical writers who develop and modify Documentation Consultants' **SDLCforms** documentation.

### 1.3 General Form and Template Information

Documentation was prepared using standard template. Certain features and functions apply to all documentation where applicable. In the majority of forms, the documents contain the following information:

- Title Page
- Revision History
- Copyright Notice and Confidential Statement
- Table of Contents
- Glossary of Terms
- Appendix Section
- Header and Footer information.
- Text in Arial font using 11 point size.

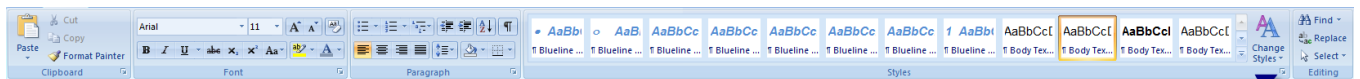


## 2 Word 2007/2010/2013 Styles

The vast majority of forms within each package are comprised of Microsoft Word forms and templates. All of these forms have been developed using custom Word Styles. The list of these styles is shown below to simplify your customization of these forms.

### 2.1 Accessing Word's Styles

To access the styles, place your cursor in the line you wish to change, click on the Home Tab and then the Styles Dialog Box Launcher (in the lower right hand corner of the Styles group).



Styles Dialog Box Launcher

The screenshot shows a Microsoft Word document with the following content:

**Operations Guide**  
Project Name  
Version

**3.5.6 Database Administration and Maintenance**

*Provide information and procedures about database administration and maintenance.*

- How to add, change, and delete:
  - Databases
  - Users, including the database administrator
  - User logins and passwords
  - User and group access and permissions to database entry, modification, deletion, restoration, indexing, packing, backup, reporting, etc.
- Provide diagrams and flowcharts of the database structure and operations.

**3.5.7 Monitoring, Troubleshooting, and Escalation**

*Provide detailed system or application monitoring, troubleshooting, and escalation procedures. Include information about:*

- Error messages
- Known problems
- Monitoring and ticket handling
- Log maintenance (e.g., how is it logged, where, by who, when)
- Escalation procedures and contacts.

**3.5.8 Backup and Recovery**

*Provide detailed system or application backup and recovery procedures. Include information about:*

- Backups, restores, and recoverability
- Scheduling procedures (e.g., when (frequency, time), where, how)
- Requirements
- Constraints
- Storage procedures (e.g., internal and external location, frequency, how it is stored, by who, how long)
- Data purging and archiving
- Emergency worksites, e.g., facility location, equipment, contacts, procedures, etc.
- Log maintenance (e.g., how is it logged, where, by who, when).

Confidential - ©2014 Documentation Consultants (www.SDLCforms.com) Document: 1550 Page 12 of 14

The Styles dialog box on the right lists the following styles:

- Clear All
- BlueLine Text Bulleted 1
- BlueLine Text Bulleted 2
- BlueLine Text Centered
- BlueLine Text Indent 1
- BlueLine Text Indent 2
- BlueLine Text Left
- BlueLine Text No Indent
- Body Text Centered
- Body Text Indented
- Body Text No. 1
- Body Text No. 2
- Body Text No. 3
- 1 Body Text Numbered
- Bulleted No. 1
- Bulleted No. 2
  - Bulleted No. 3
- Centered
- Company Name
- Copyright Text
- Document Date
- Document Title
- Footer
- Footer Confidentiality
- Footer Document Number
- Footer Page Number
- General Headings
- Gray Banner
- Gray Banner Text
- Header
- Header Document Title
- Header Logo
- Header Project Name



## 2.2 Word Custom Styles

Header Logo

**Header Document Title**  
**Header Project Name**  
Header Version Number

**Company Name**

**Document Title**

Document Date  
Copyright Text

### Table of Contents Heading

Table of Contents Numbered 1 .....  
Table of Contents Numbered 2.....  
Table of Contents Numbered 3 .....

**Gray Banner**

- 1 Heading 1**
- 1.1 Heading 2**
- 1.1.1 Heading

### General Headings

Body Text No. 1

Body Text No. 2

Body Text No. 3

Body Text Centered

#### Body Txt No. 1 Bolded

1 Body Text Numbered

- Bulleted No. 1
  - Bulleted No. 2
    - Bulleted No. 3

Note:

*Blue line Text No Indent*



*Blue line Text Left*

*Blue line Text Indent 1*

*Blue line Text Indent 2*

*Blue line Text Center*

- *Blue line Text Bulleted 1*
  - *Blue line Text Bulleted 2*
- 1 *Blue line Text Numbered*

**Table Headings**

Table Text

Table Text Centered

**Table Text Bolded**

- Table Text Bulleted
  1. Table Text Numbered
  - 2.

Footer Confidentiality

Footer Document Number

Footer Page Number

**TOC 1**

TOC 2

TOC 3

### 2.3 Replacing the Blue Line Text

The blue line text embedded throughout each form provides instructions and suggested text entries for each field on the form. These blue line entries should not appear in your finished document.

To replace a blue line entry, select the text, and click on the Delete button. However, the style will remain as one of the many blue line text entries available in the Styles library (as shown above).

You will want to change the style for that entry to one of the styles corresponding to the type of text entry you wish to replace it with, by clicking on the appropriate style in the Styles Dialog Box, such as:

Body Text No. 1
Body Text No. 2
Body Text No. 3
Body Text Centered
Table Text
Table Text Centered
<b>Table Text Bolded</b>
• Table Text Bulleted

Then type in the new text.





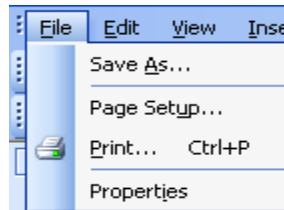
### 3 Word 2003 Maintenance Information

Note: Although no longer supported, this section only applies if you are using Word 2003. If you are using Word 2007/2010/2013, click [here](#) to review the instructions to modify Word 2007/2010/2013 forms.

The Document Properties area within the Microsoft software contains general information about the document. Users should consider changing the Summary tab within the Properties page.

To access the Properties tab, click the following on the Main Menu bar on the top of the page:

- File and Properties



- Enter appropriate line item information within the Summary tab.

The screenshot shows a dialog box titled "SDLCforms Systems Administrators Guide Propert...". It has five tabs: "General", "Summary", "Statistics", "Contents", and "Custom". The "Summary" tab is selected. The dialog contains the following fields and options:

- Title: SDLCforms System Administrator's Guide
- Subject: (empty)
- Author: Documentation Consultants
- Manager: (empty)
- Company: (empty)
- Category: (empty)
- Keywords: (empty)
- Comments: (empty text area)
- Hyperlink base: (empty)
- Template: Normal
- Save preview picture

At the bottom right, there are "OK" and "Cancel" buttons.



## 3.1 Title Page

The Title Page contains initial descriptive document information. Users should change this information to the specifics of the document. These items include the following:

- Body of Title Page
  - Company Name
  - Document Title
  - Date
- Header and Footer Information:
  - Header
    - Company Logo
    - Document Type, e.g., Business Case, System Test Plan
    - Document Title
    - Project or Version Number
  - Footer
    - Confidentiality Statement and proprietary markings (short and long versions)
    - Page Number

### Modify Title Page Body Information

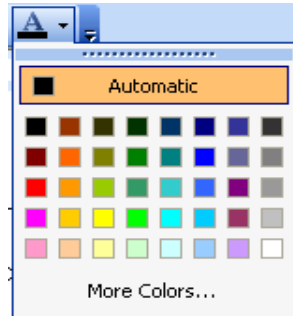
Scroll over the respective line and overwrite the appropriate information (use appropriate company font and size where applicable):

- Company Name in Arial bold, 20 point size and centered
- Document Title in Arial bold, 28 point size and centered
- Date in Arial bold, 20 point size and centered

**YOUR COMPANY NAME**  
**DOCUMENT TITLE**  
DATE



- Change Title Page information to black by clicking the font color graphic on the Main Menu bar and selecting black.

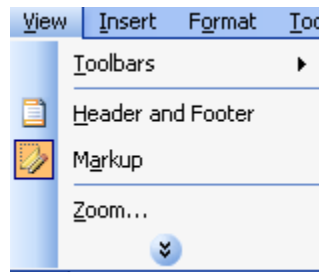


### 3.2 Header and Footer

#### Modify Header Information:

To access the Header and Footer tab, click the following on the Main Menu bar on the top of the page:

- View Header and Footer

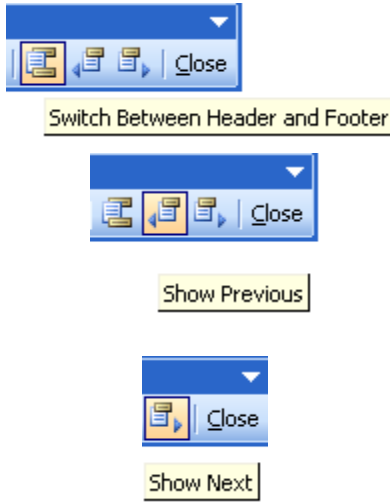


The System will display the Header information corresponding to the page you are on, e.g.,



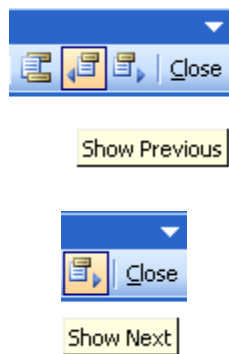
To move to other header or footer pages, click the respective icon on the graphic.





To modify the sample company logo displayed on the title and other pages:

- Find your company's logo graphic (in other documents or on your computer) and copy it.
- Return to your new document, click on the logo located in the header section, and paste your company's logo into the new document.
- Find all other sample logos by clicking the Show Previous or Show Next graphic on the menu bar to move backwards or forward within the document



To modify the document type, document title, and project or version number in the header:

- Move your cursor over each line item and type the respective information.

When complete:

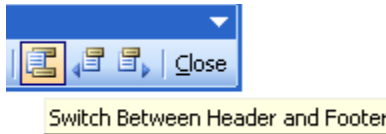
- Close out the Header / Footer graphic bar by clicking the Close icon.





or

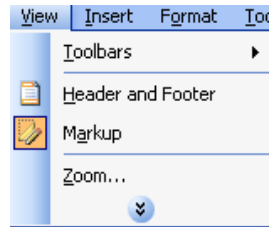
- Switch to the Footer section to make appropriate changes by clicking the Switch Between Header and Footer icon.



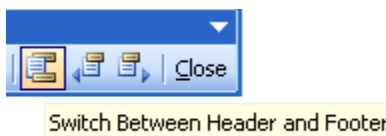
**Modify Footer Information:**

To access the Footer tab, click the following on the Main Menu bar on the top of the page:

- View and Header and Footer



- If the Header and Footer graphic is still displayed on the page, click the Switch Between Header and Footer icon:



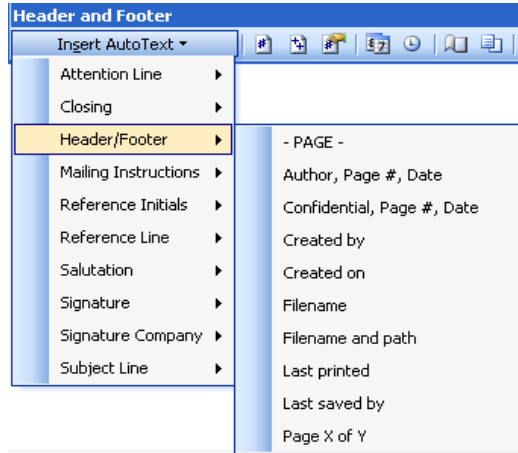
To modify the confidentiality statement in the footer:

- Move your cursor over the statement and type the respective information.

Change the statement information to black by clicking the font color graphic on the Main Menu bar and selecting black.

To modify the page number in the footer:

- Click the Insert Auto Text dropdown, Header/Footer, and Page X of Y icons.
- To change the page number in other sections of the document, find them by clicking the Show Previous or Show Next graphic on the menu bar and repeat the above procedure.



- When complete, close out the Header / Footer graphic bar by clicking the Close icon.

### 3.3 Revision History

Update the Revision History Section by entering the respective information.

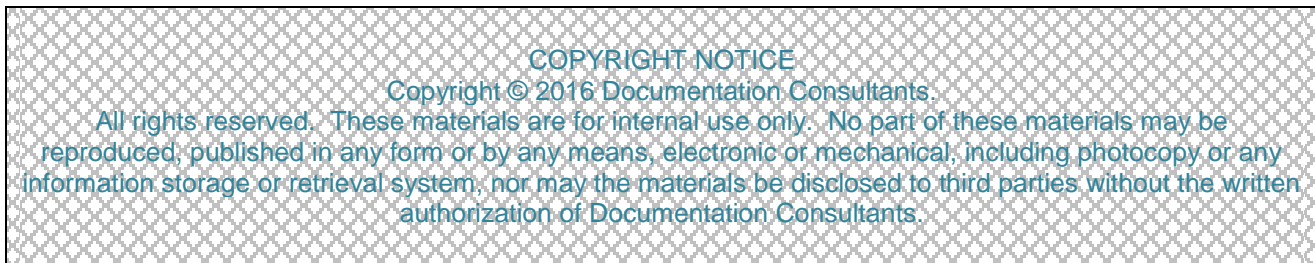
Date	Version	Author	Change



### 3.4 Copyright Notice

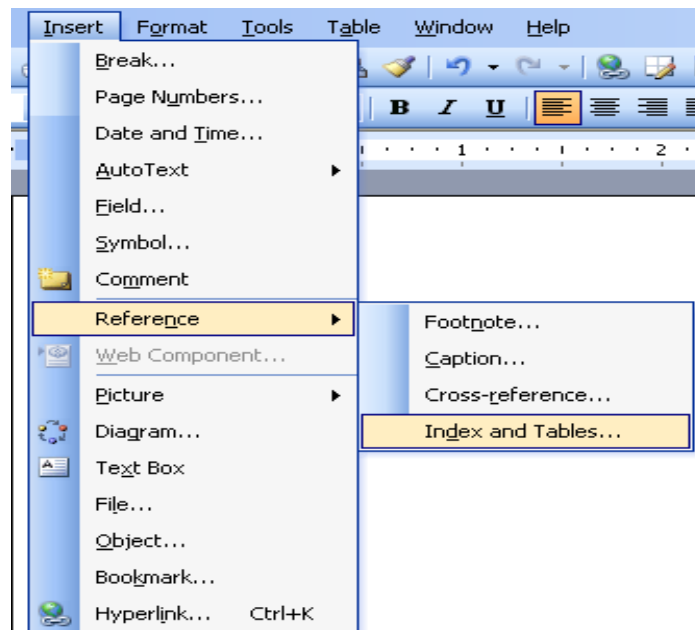
Update the Copyright Notice Section by changing the respective information.

**Example:**



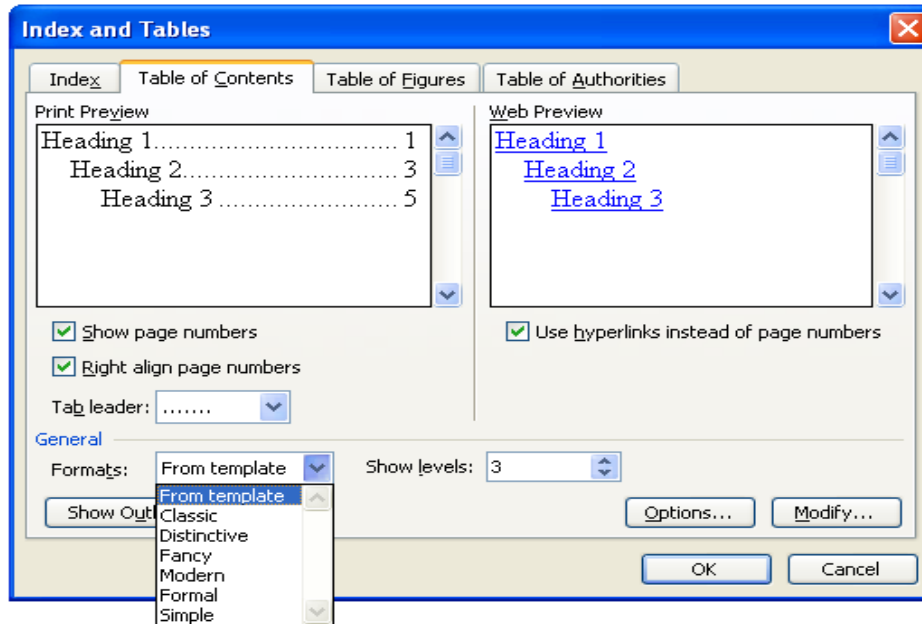
### 3.5 Table of Contents

- To create the Table of Contents, click the following on the Main Menu bar on the top of the page: Insert, Reference, and Index and Tables.





- Click the Table of Contents tab.



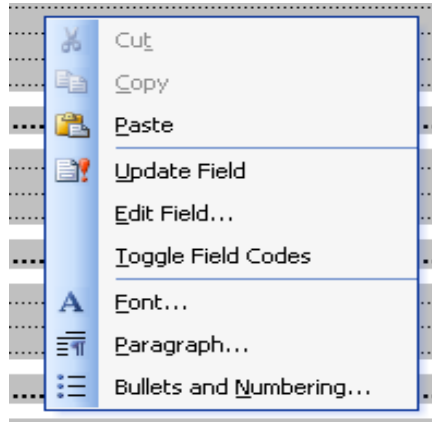
- Select the format from the From Template drop-down box.
- Select the number of levels from the Show Levels drop-down box.
- Click the OK box when finished.

**Example:**

TABLE OF CONTENTS		
<b>1</b>	<b>Purpose .....</b>	<b>4</b>
1.1	Reference Documents .....	4
<b>2</b>	<b>System Test Description .....</b>	<b>5</b>
2.1	Test Goals and Objectives .....	5
2.2	Test Entrance and Exit Criteria .....	5
2.2.1	Entrance Criteria .....	5
2.2.2	Exit Criteria .....	5
2.3	Test Deliverables .....	5
<b>3</b>	<b>System Test Approach .....</b>	<b>6</b>

- To update the Table of Contents, click the contents of the Table of Contents and the following display box will appear.





- Click the Update entire table radio box, and then press the OK box when finished.



### 3.6 Glossary

Update the Glossary Section table (if applicable) by entering the respective information.

Example:

Topic	Description
Ad-hoc Testing	This type of testing is done without any formal Test Plan or Test Case creation. Ad-hoc testing helps in deciding the scope and duration of the various other testing and it also helps testers in learning the application prior starting with any other testing.
Enhancement	The addition of new functionality and/or the change/removal of existing functionality in order to improve the application.
Functional Testing	In this type of testing, the software is tested for the functional requirements. The tests are written in order to check if the application behaves as expected.
Incident	A problem with the application, test script, tester performance and/or documentation, which prevents verification of a particular requirement or design element.
Regression Testing	The process of re-executing one or more test scripts in order to verify that errors have been properly corrected and that no new errors have been introduced.



### 3.7 Appendix

This section contains information that is important to the document, e.g., diagrams, graphics, and special information. The following table provides information that may be helpful in preparing the document and performing its quality assurance.

Topic	Description and Quality Assurance Suggestion
Document Properties	Click 'File' and 'Properties': Contains title, subject, author, and company.
Track Changes	Special side bar characters on pages to denote changes, if applicable. All tracked changes are finalized and special side bar indicators, underlines, colors, etc. must not be displayed unless requested by the client.
Title Page	Title, date, logo, names (company, preparer, and recipient names), copyright notice, confidential statement and proprietary marking.
Table of Contents	Numbered and aligned correctly, no bookmark errors, displays appropriate number of heading levels, and page numbers.
Headers and Footers	Logo, date, page number, confidentiality statement, and proprietary markings on all pages.
Heading and Section Titles	Correctly titled, numbered, and aligned with correct size and font.
Spell and Grammar Check	Note: not all recommended changes should be implemented.
Document content	Content is technically correct, consistent, complete, and is easily understood.
Document Format and Style	Consistent within the document and with similar documentation.
All requested and required information is contained within the document	Headings, sections, client data, expenses, equipment, explanations, letters, and attachments, etc.
Acronyms	Acronyms are always spelled out first.
Appendices	Referenced in the document and correctly numbered with appropriate content.
Contact Information	Correct name, address, telephone, cell, email, and fax.
Cross-References	Item referenced correctly with appropriate content.
Date and Time	Correct content and consistent format.
Footnotes	Numbered, linked, and placed correctly.
Format	Consistent size, shape, spacing, color, alignment, indentation (bullets, numbers, and outlining), lines, fonts, bolding, italicizing, underlines, borders, shading, word casing (sentence, upper, lower, title), background, fill, and line breaks.
Glossary and Definitions	Listed alphabetically or by topic and contains accurate information.
Graphics	Includes information to introduce the graphic (correct content, size, placement, and is easily understood).



Topic	Description and Quality Assurance Suggestion
Hyper-links	Recognized as a link if online-size, color, underlined, and goes to the correct location when keyed.
Index	Listed alphabetically or by topic with correct sub levels and page numbers.
Organizational Charts	Easy to read, names and titles correct, in the right reporting order, and linked to the appropriate area or management.
Page and Section Breaks	Appropriately placed, not too much white space on page, and keeps whole chapters, sections, and content together.
Page Numbers	Correctly numbered and displayed in a consistent matter.
Process and Workflow Charts	Easy to read, activity flows in a consistent order, correct activity content-uses appropriate boxes, circles, arrows, pointers, links, connections, markings, and end points. No missing or confusing steps.
Quotes and References	Content correct and displayed appropriately.
Special Characters	Used correctly and contains beginning and end marks, e.g., parentheses and brackets.
Symbols	Used and placed correctly.
Table of Figures	Referenced in the document and correctly numbered with appropriate content.
Tables and Charts	Contains an introductory sentence, easy to read, correct content, size, spacing, sorting, alignment, placement, correct row table headings and displays on each continuing page, and rows are allowed to break across pages when specified.
Terminology	Correct usage for topic, used consistently, and can be understood.



## 4 Word 2007/2010 Maintenance Information

The Document Properties area within the Microsoft software contains general information about the document. Users should consider changing the Summary tab within the Properties page.

### 4.1 Updating the Document Summary Information

- Click on the File menu and then the Properties hyperlink (on right side of window), and then select Advanced Properties to display the Properties dialog box.

The screenshot shows the Microsoft Word 2010 interface. The title bar reads "Analysis\_and\_Design\_Document.doc [Compatibility Mode] - Microsoft Word non-comm...". The ribbon includes File, Home, Insert, Page Layout, References, Mailings, Review, View, Add-Ins, and PDF. The left sidebar shows the File menu options: Save, Save As, Open, Close, Info (selected), Recent, New, Print, Save & Send, Help, Options, and Exit. The main area displays "Information about Analysis\_and\_Design\_Document" with the path "C:\Data\SDLCforms\Documents\Analysis\_and\_Design\_Document.doc". It features four sections: "Compatibility Mode" (with a Convert button), "Permissions" (with a Protect Document button), "Prepare for Sharing" (with a Check for Issues button), and "Versions" (with a Manage Versions button). The right-hand pane shows document metadata: Size (433KB), Pages (17), Words (1983), Total Editing Time (18 Minutes), Title (Analysis and Design Document), Tags (Add a tag), Comments (Add comments), Related Dates (Last Modified: Today, 10:33 AM; Created: 9/9/2008 3:30 PM; Last Printed: 12/10/2007 11:28 AM), Related People (Author: Ken Fass; Last Modified By: Bob DeLaet), and Related Documents (Open File Location). A "Properties" link is circled in green in the right-hand pane.



- Click on the Summary tab.

Analysis\_and\_Design\_Document.doc Properties

General Summary Statistics Contents Custom

Title: Analysis and Design Document

Subject:

Author: Documentation Consultants

Manager:

Company:

Category:

Keywords:

Comments:

Hyperlink base:

Template: Normal.dotm

Save preview picture

OK Cancel

- Enter appropriate information within the Summary tab.

## 4.2 Modifying the Title Page

The Title Page contains initial descriptive document information. Users should change this information to the specifics of the document. These items include the following:

- Body of Title Page
  - Company Name
  - Document Title
  - Date
- Header and Footer Information:
  - Header
    - Company Logo
    - Document Type, e.g., Business Case, System Test Plan
    - Document Title
    - Project or Version Number
  - Footer
    - Confidentiality Statement and proprietary markings (short and long versions)
    - Page Number



The various data elements comprising the page are shown in Figure 1-1.

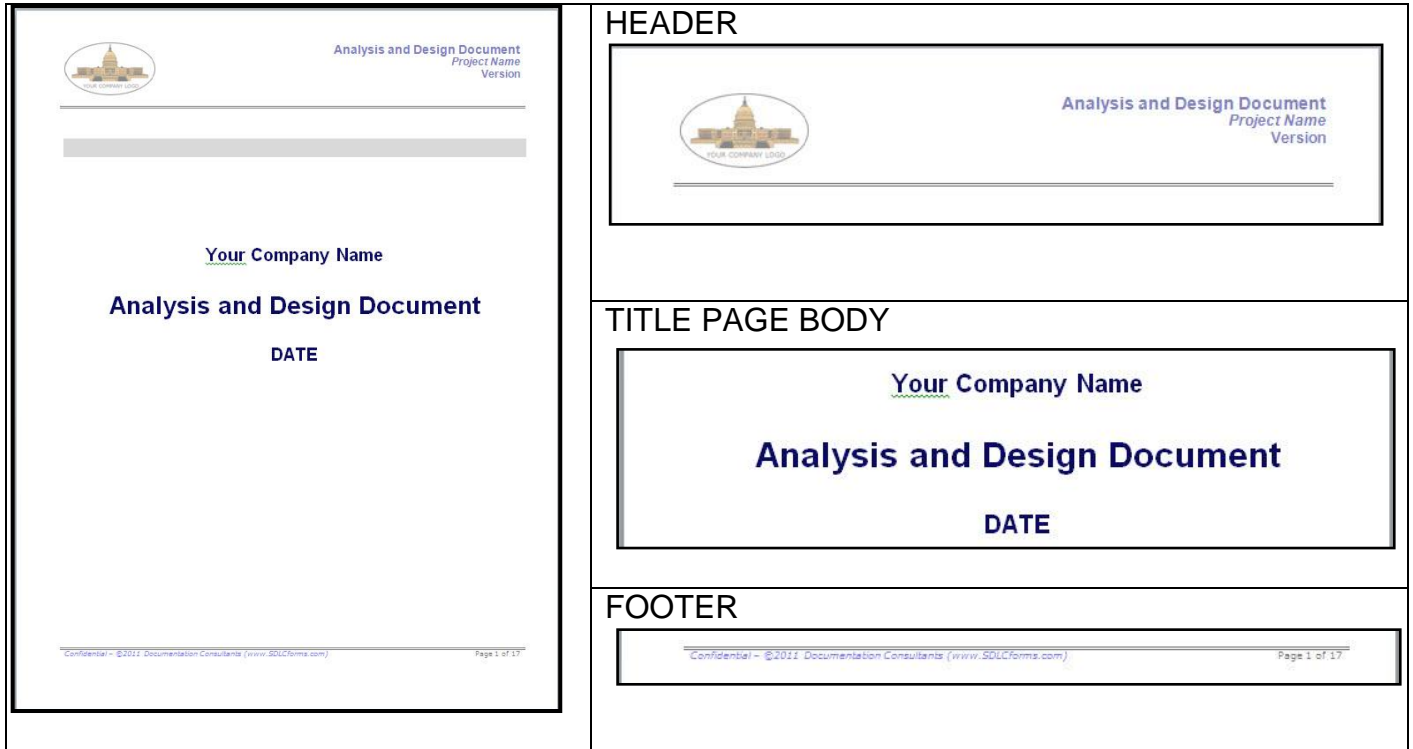
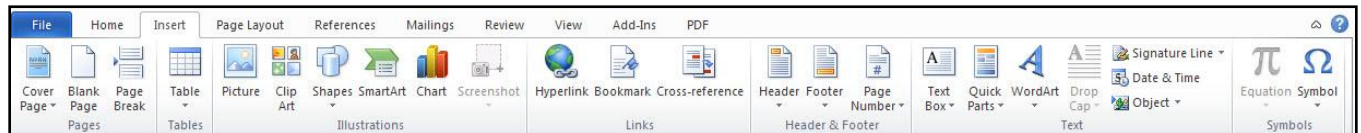


Figure 1-1. Title Page Data Elements

### 4.2.1 Modify Header Detail

To access the Header, click on the Insert Menu and then the Header icon in the Main Menu bar on the top of the page:





A dropdown menu will appear. Click on the Edit Header icon. The document header will appear highlighted for you to make changes.



### Modify the Company Logo

To replace the default company logo, click on the logo to highlight the graphic, and then click on the Picture icon. The Insert Picture dialog box will display. Navigate to the location of your company logo and click on the Insert button to insert your logo. Use the handles on the graphic to size the graphic to the desired shape and size.

Note: Since the majority of SDLCforms have multiple sections, you may need to repeat this process in every section in the document.

### Modify the Project Name

On the right hand side of the header, highlight the Project Name text and replace it with your project name.

### Modify Version

Below the Project Name, highlight the Version text and enter the version number of the document (generally Version 1.0).

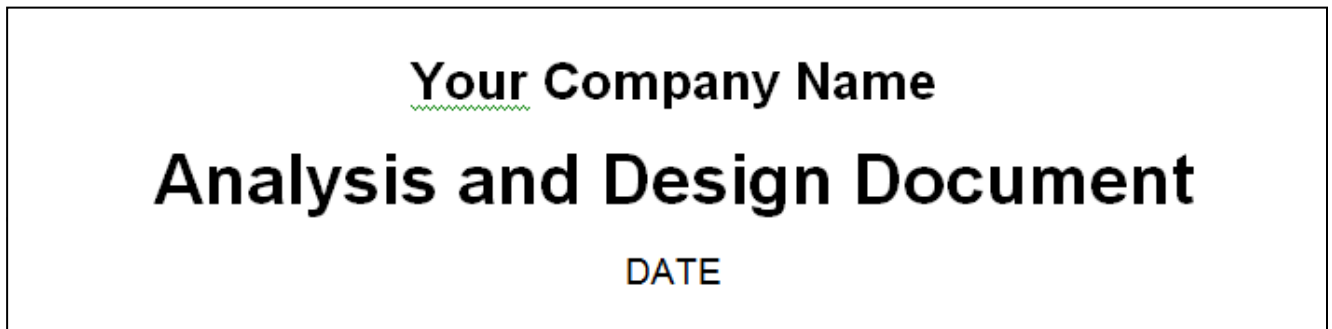
When you are complete with all changes, click on the Close Header and Footer icon to return to the title page.



## 4.2.2 Modify Title Page Body Information

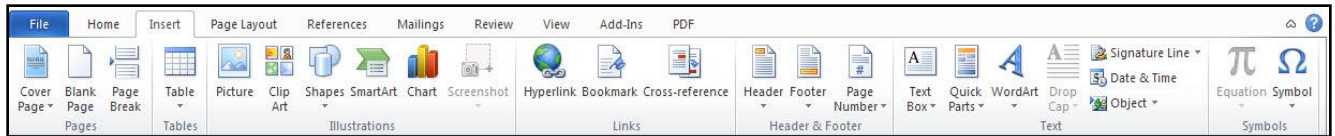
Scroll over the respective line and overwrite the appropriate information (use appropriate style where applicable):

- Replace “Your Company Name” with your company name.
- Replace “Date” with today’s date.

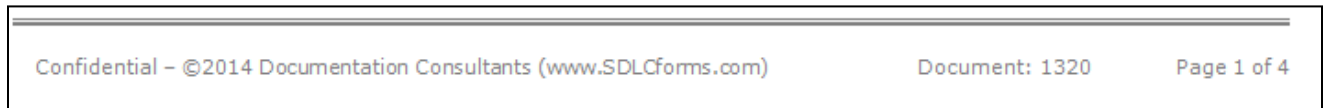


## 4.2.4 Modifying the Footer Detail

To access the Footer, click on the Insert Menu and then the Footer icon in the Main Menu bar on the top of the page:



A dropdown menu will appear. Click on the Edit Footer icon. The footer will appear highlighted for you to make changes.



To modify the confidentiality statement in the footer:

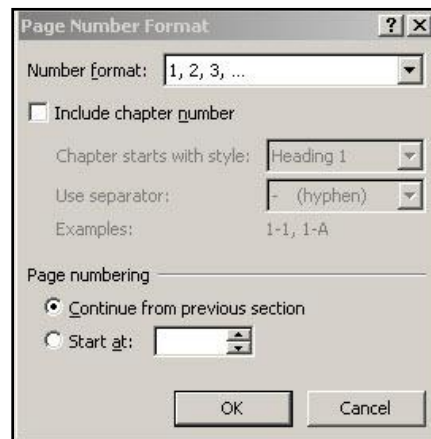
- Move your cursor over the statement and type the respective information.
- While the confidentiality statement is highlighted, change the statement information to black by clicking into the statement and when the popup menu appears, click on the “A” icon to change the color.
- Note that the representative illustration above only applies to Section 1 of the footer. You will need to scan the entire document for additional sections, as most of the SDLCforms have multiple sections due to differences in the first page layout and subsequent pages.





To modify the page number in the footer:

- Click on the Page Number icon in the Insert menu.
- A dropdown menu will display. Click on Format Page Numbers. The Page Number Format dialog will display.



You can make any changes to the page numbering scheme you desire.

When you are complete with all changes, click on the Close Header and Footer icon to return to the title page.



## 4.3 Revision History

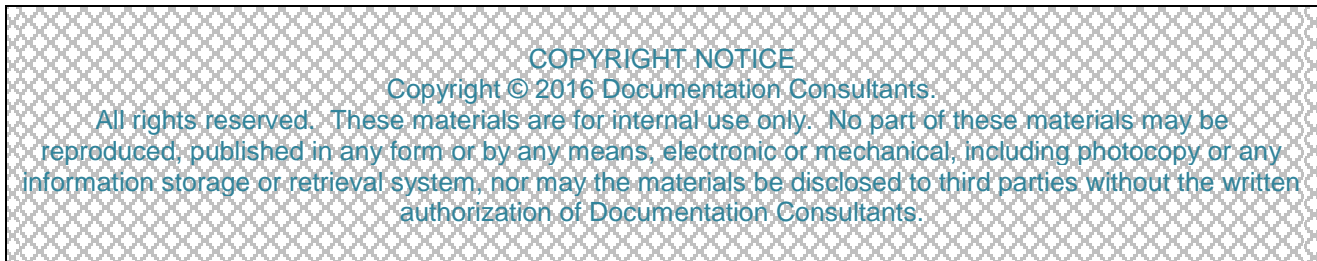
Update the Revision History Section by entering the respective information.

Date	Version	Author	Change

## 4.4 Copyright Notice

Update the Copyright Notice Section by changing the respective information.

**Example:**



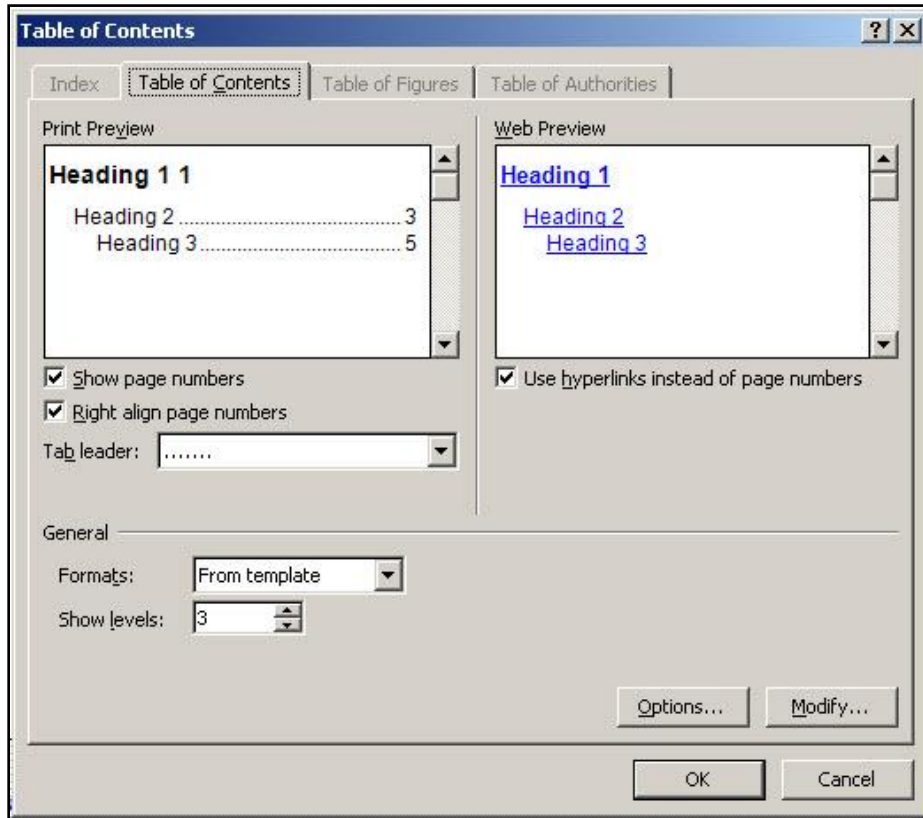
## 4.5 Table of Contents

To create or update the Table of Contents, click on the References tab on the Main Menu bar on the top of the page:

The click on the Table of Contents icon on the left hand side of the Main Menu bar.



The Table of Contents dialog will display.



Example:

TABLE OF CONTENTS	
<b>1 Purpose .....</b>	<b>4</b>
1.1 Reference Documents .....	4
<b>2 System Test Description .....</b>	<b>5</b>
2.1 Test Goals and Objectives .....	5
2.2 Test Entrance and Exit Criteria .....	5
2.2.1 Entrance Criteria .....	5
2.2.2 Exit Criteria .....	5
2.3 Test Deliverables .....	5
<b>3 System Test Approach .....</b>	<b>6</b>



To update the Table of Contents, right click the contents of the Table of Contents and then Update Field in the dropdown menu that displays

The following display box will appear.



Click the Update entire table radio box, and then press the OK box to complete the effort.

## 4.6 Glossary

Update the Glossary Section table (if applicable) by entering the respective information.

### Example:

Topic	Description
Ad-hoc Testing	This type of testing is done without any formal Test Plan or Test Case creation. Ad-hoc testing helps in deciding the scope and duration of the various other testing and it also helps testers in learning the application prior starting with any other testing.
Enhancement	The addition of new functionality and/or the change/removal of existing functionality in order to improve the application.
Functional Testing	In this type of testing, the software is tested for the functional requirements. The tests are written in order to check if the application behaves as expected.
Incident	A problem with the application, test script, tester performance and/or documentation, which prevents verification of a particular requirement or design element.
Regression Testing	The process of re-executing one or more test scripts in order to verify that errors have been properly corrected and that no new errors have been introduced.



## 4.7 Appendix

This section contains information that is important to the document, e.g., diagrams, graphics, and special information. The following table provides information that may be helpful in preparing the document and performing its quality assurance.

Topic	Description and Quality Assurance Suggestion
Document Properties	Click 'File' and 'Properties': Contains title, subject, author, and company.
Track Changes	Special side bar characters on pages to denote changes, if applicable. All tracked changes are finalized and special side bar indicators, underlines, colors, etc. must not be displayed unless requested by the client.
Title Page	Title, date, logo, names (company, preparer, and recipient names), copyright notice, confidential statement and proprietary marking.
Table of Contents	Numbered and aligned correctly, no bookmark errors, displays appropriate number of heading levels, and page numbers.
Headers and Footers	Logo, date, page number, confidentiality statement, and proprietary markings on all pages.
Heading and Section Titles	Correctly titled, numbered, and aligned with correct size and font.
Spell and Grammar Check	Note: not all recommended changes should be implemented.
Document content	Content is technically correct, consistent, complete, and is easily understood.
Document Format and Style	Consistent within the document and with similar documentation.
All requested and required information is contained within the document	Headings, sections, client data, expenses, equipment, explanations, letters, and attachments, etc.
Acronyms	Acronyms are always spelled out first.
Appendices	Referenced in the document and correctly numbered with appropriate content.
Contact Information	Correct name, address, telephone, cell, email, and fax.
Cross-References	Item referenced correctly with appropriate content.
Date and Time	Correct content and consistent format.
Footnotes	Numbered, linked, and placed correctly.
Format	Consistent size, shape, spacing, color, alignment, indentation (bullets, numbers, and outlining), lines, fonts, bolding, italicizing, underlines, borders, shading, word casing (sentence, upper, lower, title), background, fill, and line breaks.
Glossary and Definitions	Listed alphabetically or by topic and contains accurate information.
Graphics	Includes information to introduce the graphic (correct content, size, placement, and is easily understood).



Topic	Description and Quality Assurance Suggestion
Hyper-links	Recognized as a link if online-size, color, underlined, and goes to the correct location when keyed.
Index	Listed alphabetically or by topic with correct sub levels and page numbers.
Organizational Charts	Easy to read, names and titles correct, in the right reporting order, and linked to the appropriate area or management.
Page and Section Breaks	Appropriately placed, not too much white space on page, and keeps whole chapters, sections, and content together.
Page Numbers	Correctly numbered and displayed in a consistent matter.
Process and Workflow Charts	Easy to read, activity flows in a consistent order, correct activity content-uses appropriate boxes, circles, arrows, pointers, links, connections, markings, and end points. No missing or confusing steps.
Quotes and References	Content correct and displayed appropriately.
Special Characters	Used correctly and contains beginning and end marks, e.g., parentheses and brackets.
Symbols	Used and placed correctly.
Table of Figures	Referenced in the document and correctly numbered with appropriate content.
Tables and Charts	Contains an introductory sentence, easy to read, correct content, size, spacing, sorting, alignment, placement, correct row table headings and displays on each continuing page, and rows are allowed to break across pages when specified.
Terminology	Correct usage for topic, used consistently, and can be understood.



## 5 Word 2013 Maintenance Information

The Document Properties area within the Microsoft software contains general information about the document. Users should consider changing the Summary tab within the Properties page.

### 5.1 Updating the Document Summary Information

- Click on the File menu and then Prepare and then Properties, to display the Document Properties dialog box.

- Enter appropriate information within the Document Properties tab, including replacing the Author, entering the Subject and optionally entering the Category and Status.

### 5.2 Modifying the Title Page

The Title Page contains initial descriptive document information. Users should change this information to the specifics of the document. These items include the following:

- Body of Title Page
  - Company Name
  - Document Title
  - Date
- Header and Footer Information:
  - Header
    - Company Logo
    - Document Type, e.g., Business Case, System Test Plan
    - Document Title
    - Project or Version Number
  - Footer
    - Confidentiality Statement and proprietary markings (short and long versions)
    - Page Number



The various data elements comprising the page are shown in Figure 1-1.

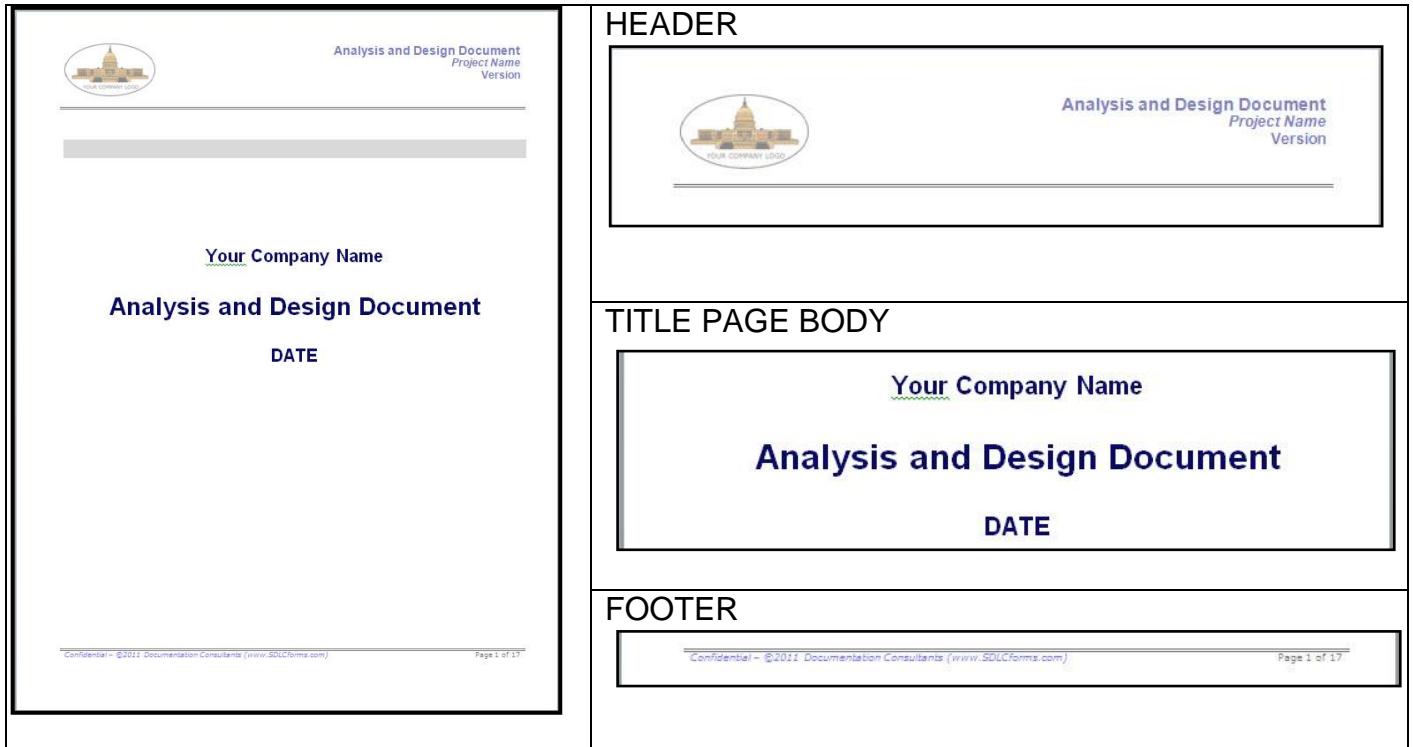
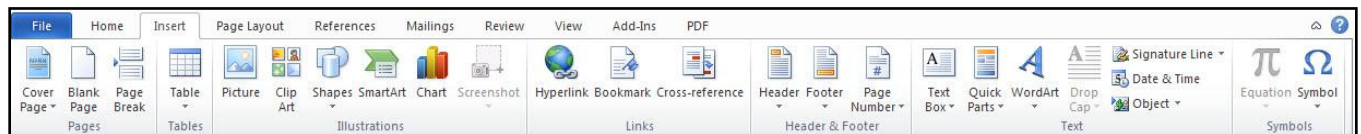


Figure 1-1. Title Page Data Elements

### 5.2.1 Modify Header Detail

To access the Header, click on the Insert Menu and then the Header icon in the Main Menu bar on the top of the page:







A dropdown menu will appear. Click on the Edit Header icon. The document header will appear highlighted for you to make changes.



### Modify the Company Logo

To replace the default company logo, click on the logo to highlight the graphic, and then click on the Picture icon. The Insert Picture dialog box will display. Navigate to the location of your company logo and click on the Insert button to insert your logo. Use the handles on the graphic to size the graphic to the desired shape and size.

Note: Since the majority of SDLCforms have multiple sections, you may need to repeat this process in every section in the document by copying the embedded (resized) graphic into the header of each section.

### Modify the Project Name

On the right hand side of the header, highlight the Project Name text and replace it with the current project name.

### Modify Version

Below the Project Name, highlight the Version text and enter the version number of the document (generally Version 1.0).

When you are complete with all changes, click on the Close Header and Footer icon to return to the title page.



## 5.2.2 Modify Title Page Body Information

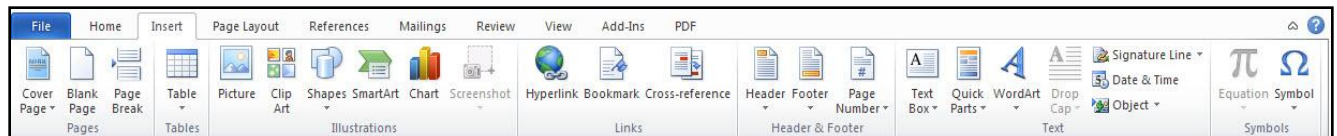
Scroll over the respective line and overwrite the appropriate information (use appropriate style where applicable):

- Replace “Your Company Name” with your company name.
- Replace “Date” with today’s date.

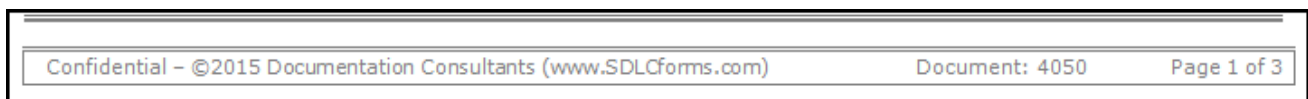


## 5.2.4 Modifying the Footer Detail

To access the Footer, click on the Insert Menu and then the Footer icon in the Main Menu bar on the top of the page:



A dropdown menu will appear. Click on the Edit Footer icon. The footer will appear highlighted for you to make changes.



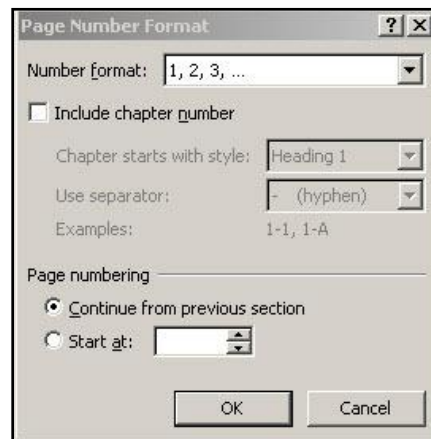
To modify the confidentiality statement in the footer:

- Move your cursor over the statement and type the respective information.
- While the confidentiality statement is highlighted, change the statement information to black by clicking into the statement and when the popup menu appears, click on the “A” icon to change the color.
- Note that the representative illustration above only applies to Section 1 of the footer. You will need to scan the entire document for additional sections, as most of the SDLCforms have multiple sections due to differences in the first page layout and subsequent pages.



To modify the page number in the footer:

- Click on the Page Number icon in the Insert menu.
- A dropdown menu will display. Click on "Format Page Numbers." The Page Number Format dialog will display.



You can make any changes to the page numbering scheme you desire.

When you are complete with all changes, click on the Close Header and Footer icon to return to the title page.



### 5.3 Revision History

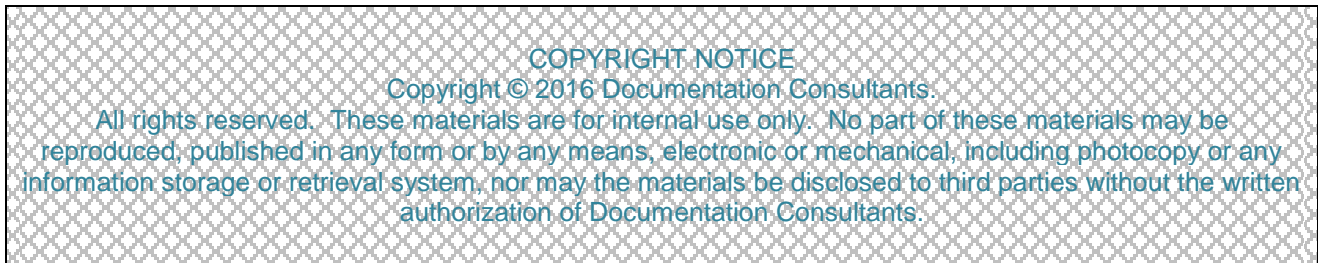
Update the Revision History Section by entering the respective information.

Date	Version	Author	Change

### 5.4 Copyright Notice

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**Example:**



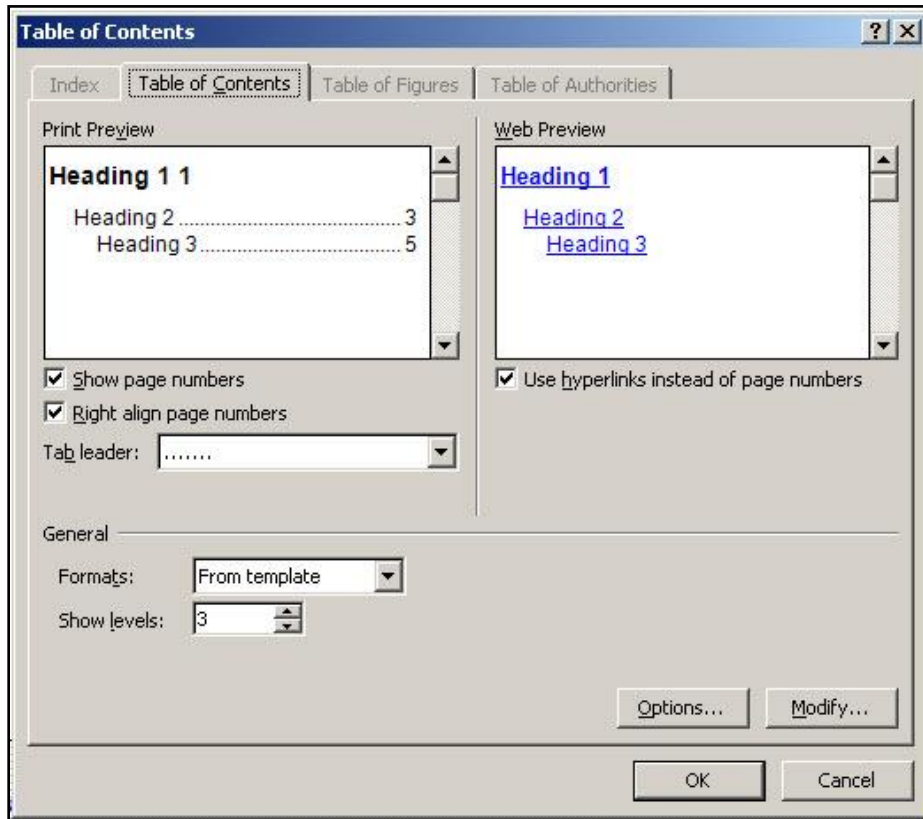
### 5.5 Table of Contents

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The click on the Table of Contents icon on the left hand side of the Main Menu bar. Scroll down to and click on "Insert Table of Contents."



The Table of Contents dialog will display.



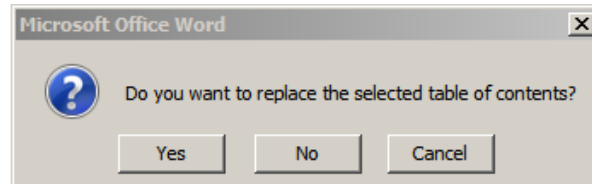
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