
Climate Data Record (CDR) Program

Instructions for Using CDR Program Templates



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1. Introduction

1.1 Purpose

This document provides instructions to authors submitting documents to NOAA's Climate Data Record (CDR) Program at the National Climatic Data Center (NCDC). Authors are required to use the Microsoft Word templates provided by the CDR Program for the following document types:

- Climate Algorithm Theoretical Basis Document (C-ATBD) [CDRP-TMP-0006]
- Operational Algorithm Description (OAD) [CDRP-TMP-0043]
- Version Description Document (VDD) [CDRP-TMP-0379]

The above templates are derived from the CDR Program Master Template [CDRP-TMP-0005]. For ease of use the derived templates are implemented as Word Documents (*.docx) rather than Word Templates (*.dotx).

Consistent use of these templates will assure that the resulting documents meet the CDR Program requirements for content and structure, as well as providing a consistent look and feel for documents exposed to the general public.

1.2 Applicable Documents

The following documents are applicable to the preparation of this document.

Title	Reference in this Document
CDRP Document Management Plan, Rev.1	CDRP-PLAN-0004

1.3 Reference Documents

The following documents were used as references during preparation of this document.

Reference
Shauna Kelly, "Making the Most of Word in Your Business: Information for users, developers, and managers", website at http://www.shaunakelly.com/ . Viewed 7/5/2013.

1.4 Document Maintenance

The CDR Program welcomes feedback on the effectiveness of its documentation standards. Comments received will be collected and periodically evaluated.

2. Instructions

These instructions apply to both external and internal authors, except where noted.

2.1 Obtain a Current Copy of the Template

Authors preparing a new or revised document should use a current copy of the template obtained from the Development Guidelines page on the CDR Website, at <http://www.ncdc.noaa.gov/cdr/guidelines.html>.

The downloaded template should be moved to the desired editing location and renamed as appropriate. For internal authors the file name should follow the pattern defined in Section 3.4.3 of CDRP-PLAN-0004, with addition of “_DRAFT_<yyyymmdd>”.

2.2 Document Cover Page

The template is constructed in two sections. The first section contains the template cover sheet and additional front matter that must be removed once it has been read and understood. To do this:

- Enable markup using the ¶ button.
- Select and delete all of the content on the cover sheet and any following front matter, down to and including the Section Break.

At this point the first page should be the cover page for the final document. Fill out this page by replacing the red text as appropriate.

2.3 Document Body

The body of the document should be filled out before attending to the front matter. Enter text under each heading, responding to the italicized guidance. **Do not delete any headings other than those identified as optional.**

2.3.1 Pasting Text

When pasting text from another document it is almost always better to use “Paste Special > Unformatted Text”. This will implement the CDRBodyText style (see Section 3.1) and reduce the amount of reformatting required. It will also avoid pollution of the style table that may occur if the paste is from a Microsoft Word Document.

2.3.2 Sentence Spacing

The proportional fonts available in Microsoft Word are designed for high readability with a single space character between sentences. Authors should refrain from using double spaces.

2.3.3 Paragraph Spacing

The CDRBodyText and other paragraph styles used in the template have built-in paragraph spacing. Additional blank lines should not be added between paragraphs.

2.4 Figure and Table Captions

The Figure Sample and Table Sample sections contain captions that can be copied, pasted as-is, and edited. This will retain the format and the number field used to create the Table of Contents. The following steps can also be used to create captions:

- Select the object to be captioned (figure or table).
- Display the Caption dialog by selecting “References > Insert Caption” from the ribbon (Windows) or “Insert > Caption” from the menu (Mac OS-X).
- Select the Label type and the caption Position. Table captions should be above, while figure captions should be below.
- Click OK.
- Enter a colon and a space after the number field, followed by the desired caption text.
- Select the entire caption and reformat to either CDRTableCaption or CDRFigureCaption style. See Section 3.2 for instructions on how to apply styles.
- Adjust the indentation and justification to give a pleasing result using the Paragraph dialog. To see this dialog on Windows, select the paragraph, select the Home tab on the ribbon, and click the arrow on the lower right of the Paragraph section. On Mac OS-X select the paragraph and use “Format > Paragraph” on the main menu.

2.5 Appendices

Fill out each appendix as directed by the italicized guidance. Additional appendices may be added as needed, using the CDRAppendixHeading style for the heading.

2.6 Front Matter

Update the Table of Contents and other front matter tables by right clicking (Windows) or using Control-click (Mac OS-X), and selecting Update Field from the pop-up menu. Unused front matter tables and their headings should be deleted.

2.7 Cleanup

Perform the following steps before submitting the document to the CDR Program

- Ensure that the correct formatting styles are used throughout the document. See Section 3 for details.
- Delete the italicized guidance.

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- Delete the Sample sections.
- Delete any unused appendices
- Ensure that all tracked changes have been accepted or rejected, i.e., the document contains no comments or tracked changes.
- Ensure that the title page, revision number, date, author, revision history, and file name are all updated and correct
- Ensure the file is saved as Word Document (.docx).

3. Technical Details

3.1 Formatting Styles

This template uses the Styles feature of Microsoft Word. If applied correctly, these formatting styles will create a consistent look and feel for CDR documentation released to the general public. To facilitate this look and feel the templates contain a set of user-defined styles whose names are prefixed with 'CDR'. These styles should be used in place of the default styles provided by Microsoft. The CDR styles are listed in Table 1.

Table 1: Styles available in CDR Program templates based on the Master Template

Style	Where Used
CDRAlphaList	Use for lists labeled a, b, c, ...
CDRAppendixHeading	Use for Appendix headings. These headings will appear in the Table of Contents.
CDRBodyText	Body text
CDRBodyTextIndent	Body text with first line indented to match headings
CDRBullet	Bullet lists
CDRCaption	Table and figure captions. Use of this style permits Word to automatically create lists of figures and tables.
CDRCode	Fixed width font for code examples
CDREquation	Equations and other mathematical statements. Alignment and numbering must be applied manually
CDRExampleHeading	Use for numbered example headings
CDRExampleText	Use for example text
CDRFigureCaption	Figure captions
CDRFrontMatterHeading	The heading above the Table of Contents and other front matter tables
CDRFrontPageProgramHeading	The "Climate Data Record (CDR) Program" heading on the title page
CDRFrontPageTitle	Document title on front page
CDRFrontPageVersion	Version information on the front page
CDRGuidance	Style used for guidance to authors. There should be no text in this style when the document is submitted to the CDR Program.
CDRGuideline	Text bulleted paragraph for guidelines.

Style	Where Used
CDRHeading 1 CDRHeading 2 CDRHeading 3 CDRHeading 4 CDRHeading 5	Headings and sub-headings in the document body. Headings 1-3 will appear in the Table of Contents.
CDRNumberedList	Use for lists labeled 1, 2, 3, ...
CDRPageFooter	Used for page footer
CDRPageHeader	Used for page header
CDRPageHeaderRevisionNumber	Used for revision number of second row of page header
CDRPageNumber	Used for page number in footer
CDRPrinciple	Used for statement of a principle
CDRRationale	Smaller font used to present rationale for standards, guidelines, and recommendations.
CDRRecommendation	Text bulleted paragraph for recommendations.
CDRReference	Use for document references
CDRStandard	Text bulleted paragraph for standards.
CDRStandardSubPart	Alpha list for multipart standards, guidelines, and recommendations.
CDRTableCaption	Table captions
CDRTableHeading	The top row in tables
CDRTableText	Body text in tables

The Normal style is not used in CDR Program templates, and documents submitted to the CDR Program should not use this style anywhere. A prompt to save the Normal template is not expected at any time during the authoring process.

3.2 Applying Styles

In Microsoft Word 97-2003 and for any version on Mac OS-X, select the relevant text and use the “Format > Style” dialog to select the desired style. This dialog has radio buttons to limit the range of styles displayed to those already in use, or those that are user-defined, i.e., the CDR styles listed above.

In Microsoft Word 2007 and 2010, select the relevant text, click the Home tab on the ribbon, and click on the arrow at the lower right of the Styles pane. Select the desired CDR style in the Styles dialog that appears.

3.3 Style Overrides

For improved communication it is sometimes desirable to modify the formatting of a small piece of text, e.g., by italicizing or bolding. Limited use of this approach is acceptable, but the styles of entire paragraphs should not be overridden, except to control their placement, as described in Section 3.4, or to format captions as described in Section 2.4.

3.4 Use of Page Breaks

Avoid the use of page breaks to control placement of text and other items, as this can cause problems as the document is revised. Instead, use the other Pagination options in the Paragraph > Line and Page Breaks dialog to control the placement of individual paragraphs, figure captions, and tables. Note that these options are a type of style override.

3.5 Changing Styles

The CDR Program may correct documents submitted with styles that are changed or misapplied from the template.