

# EPRI 2026 Software Manual Template Procedures

Formatting Specifications and Style Guide



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# EPRI 2026 Software Manual Template Procedures

Formatting Specifications and Style Guide

Software Manual, January 2026

EPRI Project Manager

**R. Swezey**

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EPRI

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# ACKNOWLEDGMENTS

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EPRI prepared this report.

Principal Investigator  
C. Tillinghast

This report describes research sponsored by EPRI.

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This publication is a corporate document that should be cited in the literature in the following manner: *EPRI 2026 Software Manual Template Procedures: Formatting Specifications and Style Guide*. EPRI, Palo Alto, CA: 2026.

# SOFTWARE DESCRIPTION

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Write the one-line introduction here. This is a single sentence describing what the software does. (e.g. “The ABC software version xx ...”)

## **Description**

This is one paragraph providing a summary description of the software. Also note if customers will incur additional expenses to utilize the software such as customization, training, purchasing a supporting program, user group fees, license fees, etc.

## **Benefits and Value**

Write the Benefits and Values here. Please provide two or three bullet points highlighting the Benefits and Value provided by the software. (e.g. “Value and benefits provided by the ABC software are: ...”)

## **Platform Requirements**

Write the Platform Requirements here. As a minimum, list the supported Windows operating systems such as Windows 8.1, and Windows 10.

## **Keywords**

List the keywords here.

# CONTENTS

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<b>1. Features Included in the Software Manual Template .....</b>	<b>1</b>
<b>2. Installing the EPRI Software Manual Template .....</b>	<b>2</b>
To Choose Where to Save the Template.....	2
<b>3. File Naming Conventions .....</b>	<b>4</b>
Naming Word Files .....	4
Single File Reports .....	4
Multiple File Reports .....	4
<b>4. Front Matter Sections.....</b>	<b>5</b>
Enter the Title Page Information .....	5
Enter the Disclaimer Page Information.....	6
Enter the Acknowledgments Page Information .....	6
Enter Additional Front Matter Section Information.....	6
Generate the Table of Contents, List of Figures, and List of Tables .....	6
To Create the Table of Contents, List of Figures, and List of Tables in a Single File Report.....	7
To Create the Table of Contents, List of Figures, and List of Tables in a Multiple File Report .....	7
Select Correct Licensed Header .....	8
<b>5. Creating an EPRI Report .....</b>	<b>9</b>
<b>6. Chapters and Appendices .....</b>	<b>10</b>
Setting Up Chapters and Appendices.....	10
Inserting Figures and Figure Captions into the Template .....	11
Inserting Tables and Table Captions into the Template.....	12
Inserting Equations and Equation Captions into the Template.....	13
Insert Landscape Pages.....	14
Insert Foldout Pages .....	14
Using Key Points .....	14

Citations, References, Bibliography, Glossary, Index .....	14
References .....	14
Glossaries and Indexes.....	17
Closing Documents .....	17
<b>7. Formatting Specifications and Style Guide.....</b>	<b>18</b>
Required Fonts .....	18
Formatting Specifications .....	18
Formatting Text .....	18
Shortcut Keys for EPRI Styles .....	19
Built-in Template Styles .....	19
Paginating the Report .....	23
<b>8. Quality Control.....</b>	<b>24</b>
Before Sending Proof Copy Back to EPRI .....	24
Report Sequence .....	25
Front Matter .....	25
Software Manual Text.....	25
Appendices .....	25
<b>A. Using Auto Text.....</b>	<b>26</b>
To Add Auto Text and Macros to the Ribbon.....	26
How to Insert an AutoText Entry .....	27
Saved AutoText Entries.....	28
<b>B. Macros .....</b>	<b>29</b>
Accessing Macros .....	29
Adding Macros to the Ribbon .....	30
<b>C. Manipulating Figures.....</b>	<b>31</b>
To Make a Floating Figure in Line with Text.....	31
To Change a Figure with Free Floating Components into a Single Picture .....	31
<b>D. Troubleshooting .....</b>	<b>32</b>

Attaching the EPRI Software Manual Template ..... 32  
Closing Documents ..... 32  
Numbered Lists..... 32

# LIST OF FIGURES

---

Figure 1. Example figure..... 11

## LIST OF TABLES

---

Table 1. Example table .....	13
Table 2. Shortcut keys .....	19
Table 3. Built-in template styles (in alphabetical order).....	19

# MANDATORY SOFTWARE INSTALLATION INFORMATION

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Both software statements below (and their titles) need to be inserted into the Installation section of the software manual.

## **Installation of EPRI Software at Client Site**

This software uses third party software products, operating systems, and hardware platforms. Over time, security issues may be uncovered in these third party products. You should review your use of this software with your Information Technology (IT) department to ensure that all recommended security updates and patches are installed to all third party products when needed.

## **If you experience difficulties accessing the application**

If you experience difficulties accessing the application after standard installation, please consult your IT department personnel to have proper access permissions setup for your use. If the problem cannot be resolved, please call the EPRI Customer Assistance Center (CAC) at 1-800-313-3774 (or email [askepri@epri.com](mailto:askepri@epri.com)).

# 1. FEATURES INCLUDED IN THE SOFTWARE MANUAL TEMPLATE

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The 2026 Software Manual template is comprised of the following:

- Built-in Microsoft Word Type styles.
- Macros for inserting captions and table of contents.
- Auto Text for inserting Title page, Disclaimer, and key point information, as well as headers (including license information).
- Pre-set front matter, sections, and appendices.

The template is designed to facilitate and standardize Software Manual formatting through the use of Word styles. The template is a Microsoft Word document and operates on machines using MS Office software.



## **Key Information Point**

Use the EPRI Key Point text box to call out important pieces of information.  
See the *Insert Key Point* section for instructions.

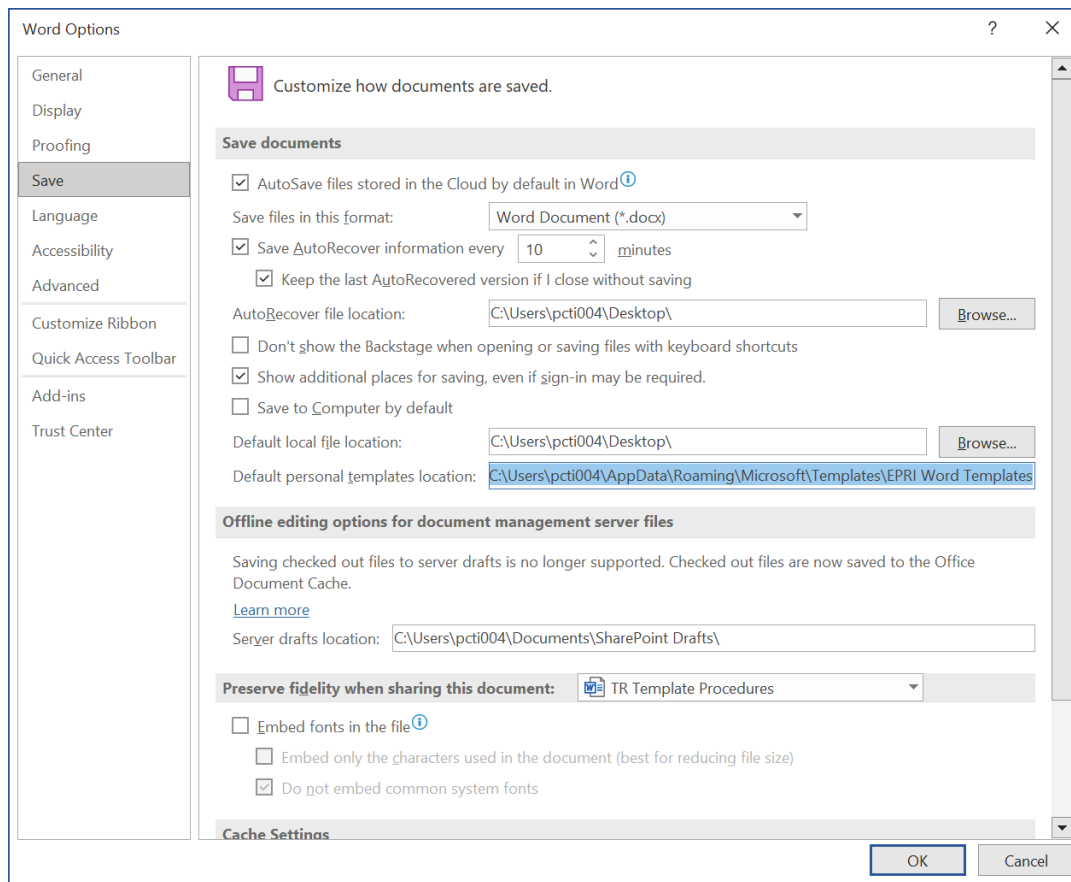
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## 2. INSTALLING THE EPRI SOFTWARE MANUAL TEMPLATE

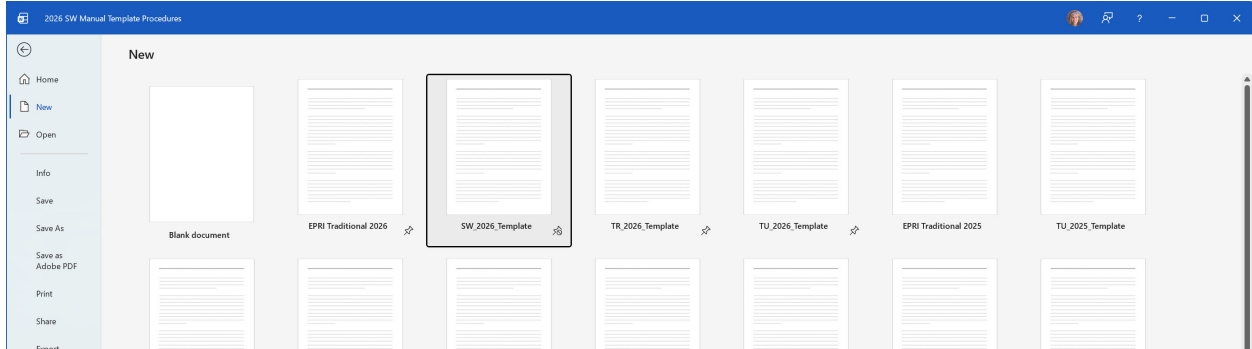
Save the SW 2026 Software Manual template file in the appropriate directory for Microsoft Word to recognize it as an active template.

### To Choose Where to Save the Template

1. Download the *SW\_2026\_Template* file to your computer. You may choose any folder location because your next step is to identify that path in Word so that it knows where to look for your personal templates.
2. Open a blank Word document.
3. Click the **File** button in the upper left hand corner and select **Options**.
4. Select **Save**.
5. Find the *Default personal template location:* box.
6. Enter the folder location where you have saved your templates on your desktop and click **OK**.



7. Close Word and re-open a new blank file.
8. Click **File > New**.
9. Select PERSONAL and *TU\_2026\_Template* should appear as a choice of templates.



## 3. FILE NAMING CONVENTIONS

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### Naming Word Files

Please comply with the following file naming conventions, especially when working with multiple-file documents.

#### Single File Reports

Reports prepared in one Word file should be named using the full the Software ID number. For example, for Software ID number 3002000000 the file should be named 3002000000.docx.

#### Multiple File Reports

In rare occasions, it may be necessary to create a report from multiple Word documents because a single file would be too large, slowing your computer and risking corruption of the file. These steps are provided in this document in the *To Create the Table of Contents, List of Figures, and List of Tables in a Multiple File Report* section below.

Name multiple file reports by sections:

- Use the Software ID number plus “fm” for the front matter.
- Use the Software ID number plus “CH” for sections.
- Use the Software ID number plus “AP” for appendices.
- Include a two-digit sequence number for said section or appendix.
- If a section or appendix must be split into two files, add a lowercase sequence letter after the section/appendix number.
- Example:

Front Matter	3002000000fm.docx
Section 1	3002000000CH01.docx
Section 2	3002000000CH02.docx
Section 3, part 1	3002000000CH03a.docx
Section 3, part 2	3002000000CH03b.docx
Appendix A	3002000000APA.docx
Appendix B, part 1	3002000000APB1.docx
Appendix B, part 2	3002000000APB2.docx

## 4. FRONT MATTER SECTIONS

---

The front matter pages of a Software Manual consist of the following:

- The **Cover** page contains:
  - **Title:** A maximum of 90 characters or less (including spaces) is recommended. Acronyms and abbreviations should be avoided.
  - **Subtitle:** Strongly advised. A maximum of 150 characters including spaces is recommended for the title and subtitle together.
- The **Title** page contains:
  - **Title:** A maximum of 90 characters or less (including spaces) is recommended. Acronyms and abbreviations should be avoided.
  - **Subtitle:** Strongly advised. A maximum of 150 characters including spaces is recommended for the title and subtitle together.
  - **Software Manual Number**
  - **Type of Report:** Software Manual
  - **Publication Date:** The month and year that the report is published.
  - **EPRI Project Manager:** First initial and last name.
  - **NQA/Non-NQA wording if appropriate** (Nuclear Power reports only).
- The **Disclaimer** page contains legal information, the names of the organizations that prepared the report, and ordering information.
- The **Acknowledgments** page states the research contractor's name, address, and principal
- The **Software Description** page describes what the software does.
- The **Mandatory Software installation Information** page provides information about the installation of EPRI software at the client site and instructions for those who experience difficulties accessing the application.
- The **Table of Contents**, **List of Figures**, and **List of Tables** pages provide hyperlinks to the various parts of the manual.

### Enter the Title Page Information

1. Type the correct title and subtitle where indicated.

Notes:

- These are automated fields and will repeat in the Acknowledgments page.
  - If there is no subtitle in the report, click on the subtitle field, select the gray box tab, then hit the Delete button on the keyboard.
2. Determine whether the manual is a Nuclear report.
    - For a Nuclear report, determine whether it is NQA or Non-NQA.

- Based on that determination, choose the correct Auto Text entry for the Title Page as shown in the following three figures.

All or a portion of the requirements of the EPRI Nuclear Quality Assurance Program apply to this product.	YES <input type="radio"/> NO <input checked="" type="radio"/>
---	---

All or a portion of the requirements of the EPRI Nuclear Quality Assurance Program apply to this product.	YES <input checked="" type="radio"/> NO <input type="radio"/>
---	---

3. Enter the Project Manager’s first initial and last name, month of publication, and Software ID number where indicated in the footer.

### Enter the Disclaimer Page Information

1. Use the Auto Text list to insert the appropriate disclaimer information by choosing from the following list.
  - SW Manual Disclaimer Copyright
  - SW Manual Disclaimer Executable
2. Enter the Research Contractor company name where indicated.

### Enter the Acknowledgments Page Information

1. Enter the Research Contractor company name, address, and principal investigator where indicated.
2. Enter additional acknowledgments if necessary where indicated. Use EPRI Front Matter Text to style.

### Enter Additional Front Matter Section Information

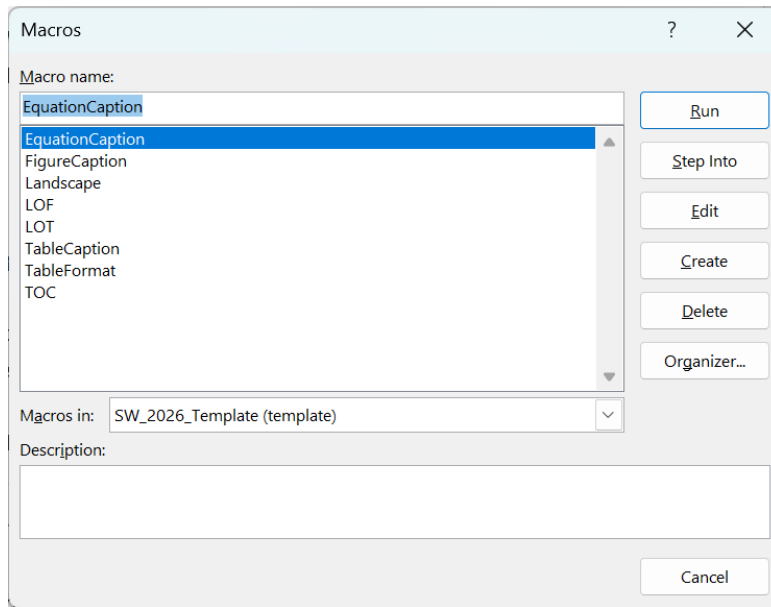
In addition to the front matter sections discussed earlier, Software Manuals can contain user-defined front matter sections. Use EPRI Front Matter Text, EPRI Front Matter Subhead, and EPRI Front Matter Bullet to style.

### Generate the Table of Contents, List of Figures, and List of Tables

While the Table of Contents, List of Figures, and List of Tables should be generated at the end of the formatting process, the procedures on how to create them are listed here because they are the last part of the front matter. The TOC, LOF, and LOT are all generated through macros.

## To Create the Table of Contents, List of Figures, and List of Tables in a Single File Report

1. Place the cursor where you want to insert the Table of Contents, List of Figures, or List of Tables page.
2. From the ribbon, go to *Developer* and select **Macros**. (Or press **Alt + F8**)
3. Select **SW\_2026\_Template (template)** from the *Macros in box*.
4. Select **TOC, LOF, or LOT**.
5. Click **Run**.



## To Create the Table of Contents, List of Figures, and List of Tables in a Multiple File Report

1. Open the front matter file. ("Software ID#fm.docx.")
2. In the TOC/LOF/LOT section, insert a series of RD fields that reference each of the chapter and appendix files in order.
  - Press **Ctrl+F9** to insert an empty field code object.
  - Type **RD** followed by a space inside the field code brackets.
  - Type (or paste) the path and filename of the appropriate chapter/appendix file enclosed in quotation marks.
  - Type a space then a backslash and the letter f.
  - Repeat for each chapter or appendix file.
  - The list should look like this:  
{ RD "3002001000ch01.docx" \f }  
{ RD "3002001000ch02.docx" \f }

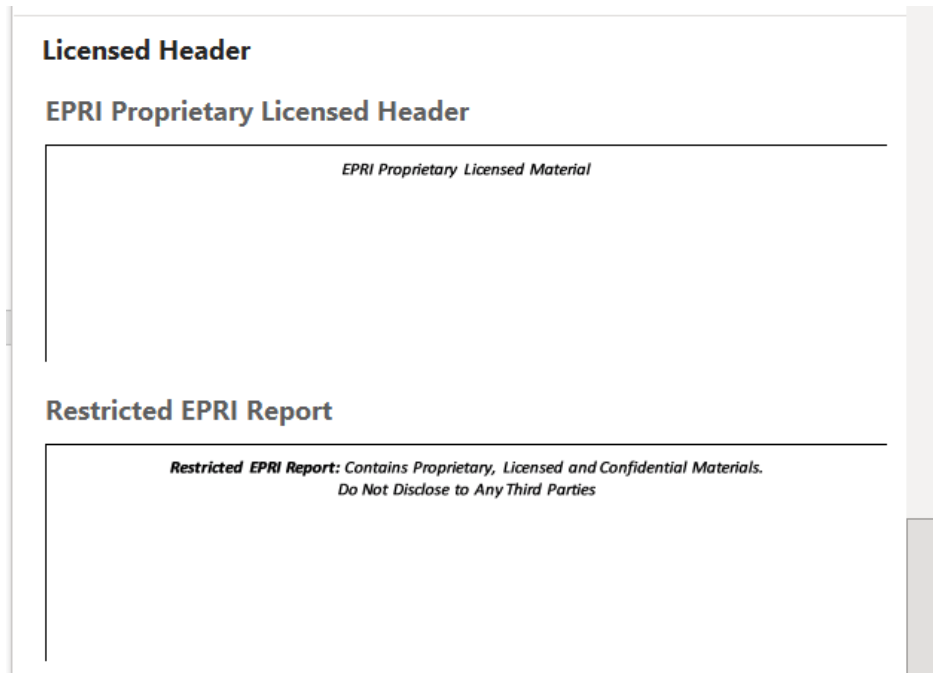
```
{ RD "3002001000ch03.docx" \f }  
{ RD "3002001000apa.docx" \f }  
{ RD "3002001000apb.docx" \f }
```

3. Place the cursor where the TOC should appear.
4. Run the TOC, LOF or LOT macro. The list should include all the chapters and appendices in the multi-file document.
  - To update an existing TOC, LOF or LOT, select it and press F9. You will be given the option of updating the entire table or the page numbers only.

## Select Correct Licensed Header

If a Software Manual is executable or restricted, the licensed header begins on the first page of the Executive Summary.

- Determine the license of the report: copyright, executable, or restricted.
  - If the license is copyright, delete the text in the header throughout the report.
  - If the license is executable, insert the EPRI Proprietary Licensed Material Auto Text entry into the header.
  - If the license is restricted, insert the **Restricted EPRI Report: Contains Proprietary, Licensed and Confidential Materials, Do Not Disclose To Any Third Parties** Auto Text entry into the header.

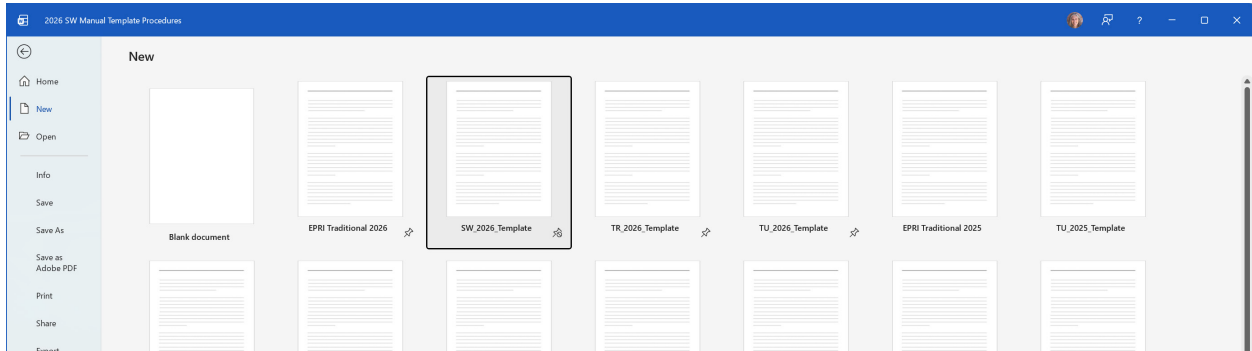


## 5. CREATING AN EPRI REPORT

---

This section documents how to create a single-file and a multi-file Software Manual. We strongly suggest that all reports containing less than 200 pages and fewer than 50 graphics be created as one file. This reduces file-naming management and helps simplify the process.

1. From the ribbon, select **File > New > PERSONAL**.



2. Double click the **SW\_2026\_Template**.
3. An untitled Word document appears containing the front matter, body sections of the template. Also included are some helpful tips and brief descriptions.
4. Save the file according to the naming conventions in Section 3.

## 6. CHAPTERS AND APPENDICES

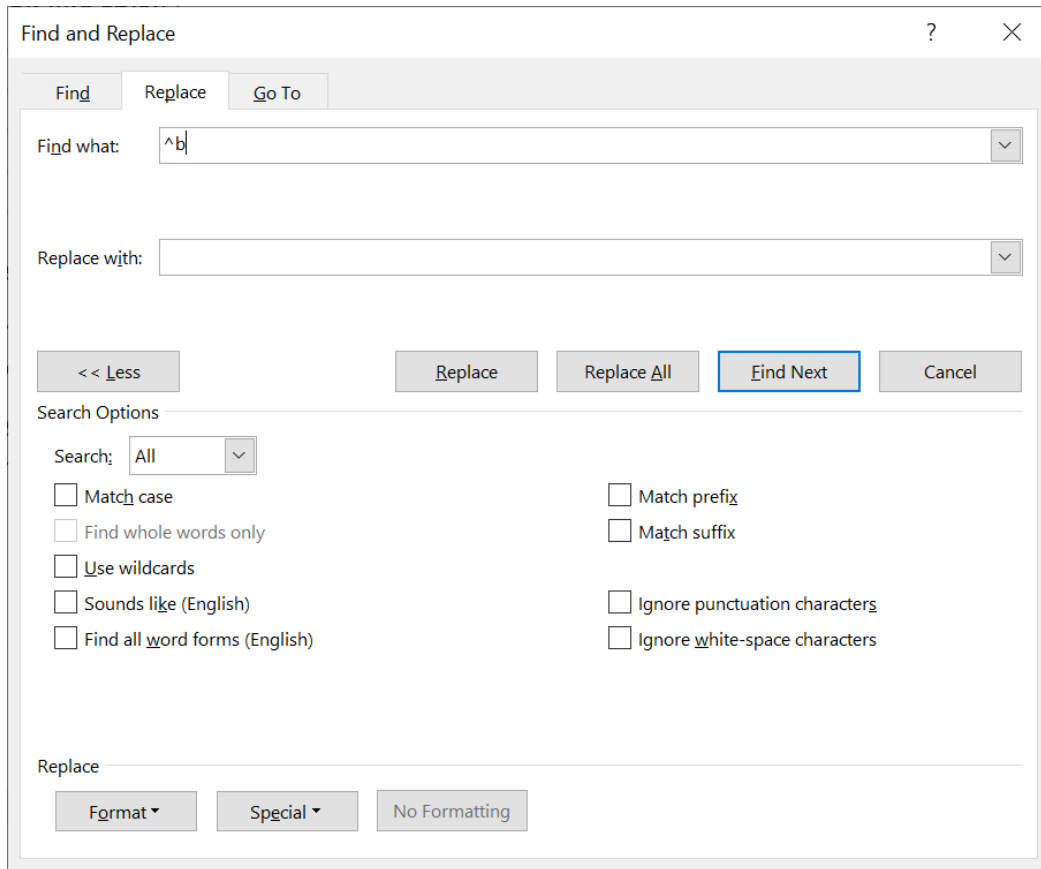
This section explains how to insert information from the original document to the template, as well as how to incorporate landscape and foldout pages.

### Setting Up Chapters and Appendices

The template includes two chapters and one appendix populated with example text, figures, and tables.

To populate the template file with your document information, follow the steps below.

1. Fill in the front matter text.
2. Starting at Chapter 1, search your original document for Section Breaks and delete them.



3. Next, copy the text from the original document and paste it into the template file starting at Chapter 1.
4. Style the text appropriately using the built-in styles. See Section 7 for a list of the styles.

## Inserting Figures and Figure Captions into the Template

There are three steps to inserting a figure and figure caption. Please follow the steps below and use the macros when instructed.

### 1. Insert the figure.

- From the Ribbon, go to *Insert* and select **Pictures >This Device**. Select the desired graphic and click **Insert**.

### 2. Style the figure.

- Use the *EPRl Figure* style.

### 3. Insert a figure caption.

- Use the *FigureCaption* macro to insert a caption. It should be placed below the figure in sentence-style caps.
- Using the **References > Insert Caption** method will also work; however, you must take a second step to style it using the *Caption – Figure* style. If the figure captions are not styled correctly they will show up in the List of Tables instead of the List of Figures.
- **Notes:**
  - The template does not accommodate multiple qualifiers for one number (for example, Figure 1a, and Figure 1b).
  - EPRl formatting standards do not permit wrapping text around graphics.
  - Extract images to edit them if the original is unavailable.
  - Under no circumstances should graphics be linked across main directories, disk drives, or over networks.



Figure 1. Example figure

## Inserting Tables and Table Captions into the Template

There are four steps to inserting a table and table caption. Please follow the steps below and use the macros when instructed.

### 1. Insert the table caption.


- Use the *TableCaption* macro to insert a caption. It should be placed above the table in sentence-style caps.
- Using the **References > Insert Caption** method will also work.
- Note: The template does not accommodate multiple qualifiers for one number (for example, Table 1a, and Table 1b).

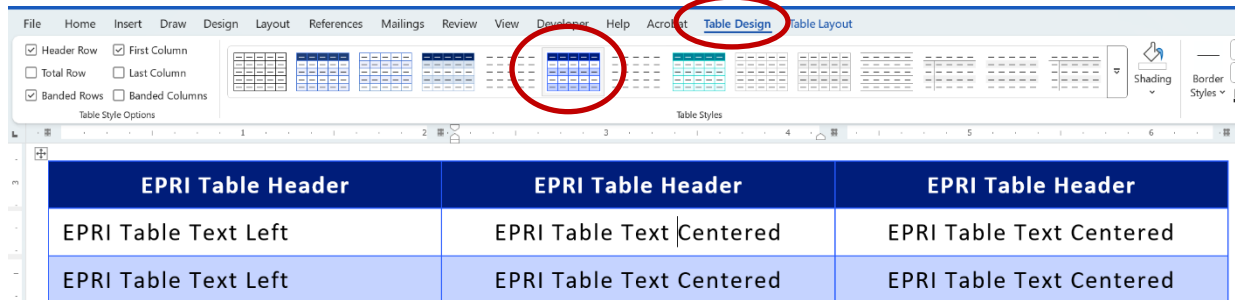
### 2. Insert the table.

- From the Ribbon, select **Insert > Table**.
- Choose the number of columns and rows.
- Select **Insert Table...**

### 3. Apply the *Table Design* selection.

This automatically applies the appropriate border and shading to the table.

- To access *Table Design*, select the table and click on the *Table Design* tab on the ribbon.
- Click the  table style.



- The Table Design selection automatically sets the following border and shading attributes.
  - Border color: RGB: Red: 37, Green: 89, Blue: 255; Hex: #2559FF. Weight: ½ pt.
  - Header shading: RGB: Red: 0, Green: 29, Blue: 122; Hex: #001D7A.
  - Alternating row shading: RGB: Red: 197, Green: 211, Blue: 255; Hex: #C5D3FF.

#### 4. Format the table.

- Use the *TableFormat* macro to automatically apply the appropriate Table Properties.
  - **Preferred width:** 100%
  - **Alignment:** Center
  - **Indent from left:** 0
  - **Text wrapping:** None
  - **Row:** Specify height: uncheck box
  - **Allow row to break across pages:** check box
  - **Repeat as header row at the top of each page:** uncheck box
  - **Vertical alignment:** Center

Table 1. Example table

EPRI Table Header	EPRI Table Header	EPRI Table Header
EPRI Table Text Left	EPRI Table Text Centered	EPRI Table Text Centered
EPRI Table Text Left	EPRI Table Text Centered	EPRI Table Text Centered

- Note: If a table flows to the next page, repeat header rows and type in a manual table caption. Apply the Caption – Table Continued style. For example:

Table 6 (continued). Table caption

## Inserting Equations and Equation Captions into the Template

EPRI prefers equations to be formatted as shown:

$$A \times B = C \qquad \text{Eq. 1}$$

1. Place the cursor in the position to insert the equation.
2. Go to *Insert > Eq.* Equation Editor will create an equation field and open the equation toolbar.
3. Enter the equation.
4. Insert a tab and use the *EquationCaption* macro to insert a caption.

## Insert Landscape Pages

1. Place the cursor at the beginning of the text/figure/table that you want to switch to landscape.
2. Select the *Landscape* macro. This will insert a Section Break, change the orientation, and instruct the page numbers to continue.
  - Note: To switch back to Portrait, use the *Landscape* macro again.

## Insert Foldout Pages

Use the same steps as for inserting landscape pages, but change the section break to an **Odd Section Break** instead of a Next Page Section Break. (**Layout > Page Setup > Layout > Odd Section Break dropdown.**) Also, choose **Size/Tabloid (11"x17")** in the *Page Layout* section on the Ribbon.

**Note:** Foldouts must start on an odd page, and they must be followed by an odd page break even if it means leaving the opposite side of the foldout blank.

## Using Key Points

The key points are organized according to seven categories:

1. Key Cost Point
2. Key Technical Point
3. Key Human Performance Point
4. Key Observation Point
5. Key Benchmarking (Member Experience) Point
6. Key Information Point
7. Key Safety Point

Each category has an identifying icon to draw attention to it when quickly reviewing the guide.

All key points are located in Auto Text.

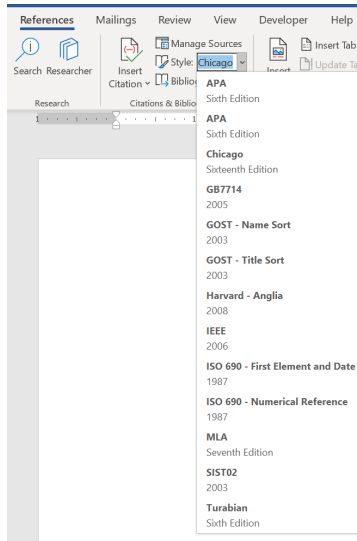
## Citations, References, Bibliography, Glossary, Index

### References

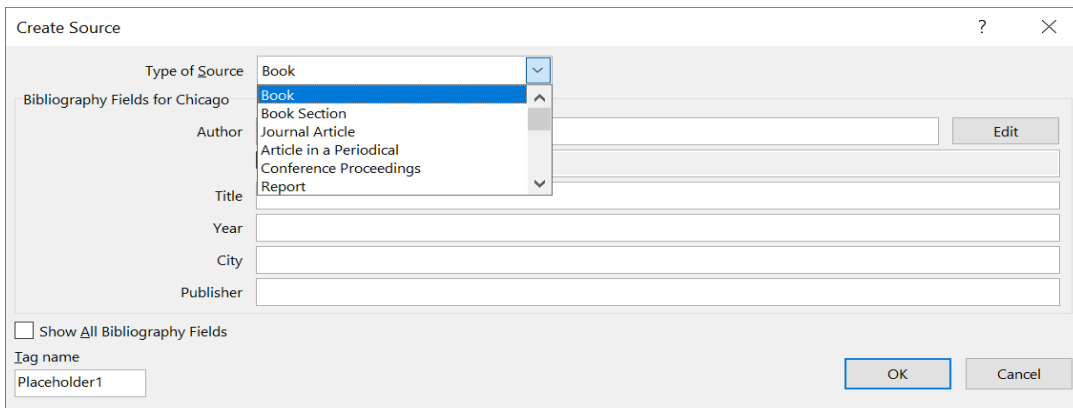
EPRI is flexible with reference styles. If you do not have a specific style you want to use, please use Chicago Manual of Style. Otherwise, you are free to create the references in whatever style works best for the content of the report.

References can be added one of two ways: manually enter the references into the document, or add citations through Word's *Insert Citation* feature. To do this, follow the steps below:

1. Go to the *References* section on the Ribbon. In the *Style* box, choose whichever reference style works for you.



2. Insert citations in the appropriate places in the document by going to the *Reference* section on the Ribbon, then selecting **Insert Citation > Add New Source**. The following *Create Source* window will open.



3. Create the source information.
  - For **Chicago Manual Style**, enter the information as shown below.

- The resulting reference will appear in the text as: (Krause 2000).
- When all the citations are entered:
  - Place your cursor at the top of the last chapter before the appendix.
  - In the *References* section of the Ribbon, select **References > Bibliography > Bibliography** or **References>Bibliography>References**. A list will be auto generated consisting of all the citations you added throughout the report.

## REFERENCES

Krause, Tipton. 2000. Information Security Management. Boca Raton, FL: CRC Press LLC.

- For **IEEE Style**, enter the information as shown below. (The EPRI citation in the Acknowledgments page uses this style.)

- The resulting reference will appear in the text as: [1].
- When all the citations are entered:
  - Place your cursor at the top of the last chapter before the appendix.
  - In the *References* section of the Ribbon, select **References > Bibliography > Bibliography** or **References>Bibliography>References**. A list will be auto generated consisting of all the citations you added throughout the report.

## REFERENCES

---

[1] A. Simpson, HTML Publishing, Forster City, CA: IDG Books Worldwide, 1996.

- When citing **EPRI reports**, the format should be Common Information Model (CIM) Compliance Testing Task Force. Palo Alto, CA: 2017. 3002007878.

### Note:

- Add a citation anywhere in a sentence. The citation precedes all punctuation except dashes.

## Glossaries and Indexes

Glossaries and indexes are optional.

### Glossaries

A glossary is a useful tool in a publication containing unfamiliar terms. Words to be defined should be arranged in alphabetical order, each on a separate line and followed by its definition. Examples are shown below:

**acid-free paper.** Paper having a pH of 7, or close to 7.

**alteration.** A change from the manuscript copy introduced in proof.

### Indexes

An index consists of entries that include a heading, locators (page numbers), subentries, and cross-references as needed. The heading of an index entry is normally a noun or noun phrase. The first word of a heading is normally capitalized only if capitalized in the text. Examples are shown below:

agricultural collectivization, 143-46, 198

## Closing Documents

When closing a document, Word may ask to save changes to the template. Click **No**.

# 7. FORMATTING SPECIFICATIONS AND STYLE GUIDE

---

## Required Fonts

For consistency and for accessibility, only **Century Gothic** and **Calibri** fonts should be used in the template. On occasion, additional fonts will be needed to accommodate mathematical symbols and other nonstandard characters.

## Formatting Specifications

**Page size:** 8.5" x 11" or 11" x 17"

**Margins:** 1 inch on all edges

**Fonts:** Century Gothic and Calibri (see above)

### Headers and Footers:

- Header from edge of paper: 0.19"
- Footer from edge of paper: 0.5"

## Formatting Text

The SW 2026 template comes complete with built-in styles. Table 3 provides a list of those styles. The most frequently used are called out in the following list.

- **EPRI Normal:** used for all body text.
- **EPRI Bulleted List:** used for bullets.
- **EPRI Numbered List:** used for numbered lists.
- **EPRI Front Matter:** used for all the body text in the front matter.
- **EPRI Front Matter Subhead:** used for subheads in the front matter.
- **Heading 1 and Heading 6:** used for chapter and appendix headings.
- **Heading 2 through Heading 5:** used for all the subheads in the report.
- **EPRI Figure:** used for styling figures.
- **EPRI Table Header:** used for table heads.
- **EPRI Table Text Centered/EPRI Table Text Left:** used for information in tables.

## Shortcut Keys for EPRI Styles

Below is a table of Shortcut Keys for the most commonly used EPRI styles.

Table 2. Shortcut keys

Style	Shortcut Key
EPRI Normal	F2
EPRI Bulleted List	F3
EPRI Numbered List	F4
EPRI Front Matter	F5
EPRI Front Matter Subhead	F6
EPRI Figure	F7
EPRI Table Header	Alt+F1
EPRI Table Text Centered	Alt+F2
EPRI Table Text Left	Alt+F3
Heading 2	Alt+F4
Heading 3	Alt+F5

## Built-in Template Styles

Table 3. Built-in template styles (in alphabetical order)

Name of Style	Style Specifications
Caption - Figure	Font: Calibri, 10pt, Custom color Hex 001D7A   Left justified   Line spacing: Single   Before: 7pt   After: 14pt
Caption - Table	Font: Calibri, 10pt, Custom color Hex 001D7A   Left justified   Line spacing: Single   Before: 14pt   After: 7pt, keep with next
EPRI Address	Font: Calibri, 10pt   Centered   Line spacing: Single   Before: 50pt   After: 0pt   Top: Solid line, .25pt Custom color Hex 001D7A
EPRI Address Footer	Font: Calibri, 10pt   Centered   Line spacing: Single   Before: 50pt   After: 7pt   Top: Solid line, .25pt Custom color Hex 001D7A
EPRI Block Quote	Font: Calibri, 12pt   Left justified   Line spacing: Single   Before: 9pt   After: 9pt   Left: 0.5"   Right: 0.5"
EPRI Block Quote Source	Font: Calibri, 12pt   Right justified   Line spacing: Single   Before: 9pt   After: 9pt   Left: 0.5"   Right: 0.5"
EPRI Bulleted List	Font: Calibri, 12pt   Left justified   Line spacing: Single   Before: 3pt   After: 3pt   Left: 0"   Hanging: 0.25"   Bullet color: Hex 001D7A
EPRI Citations	Font Calibri, 12pt   Left Justified   Line spacing: Single   Before: 9pt   After: 6pt   Top border: Hex 001D7A

Table 3 (continued). Built-in template styles (in alphabetical order)

Name of Style	Style Specifications
EPRI Copyright Text	Font: Calibri, 9pt   Left justified   Line spacing: Single   Before: 7pt   After: 4pt   Left: 0.39"   Right: 0.39"
EPRI Copyright Title	Font: Century Gothic, 12pt Bold   All Caps   Justified   Line spacing: Single   Before: 12pt   After: 4pt   Left: 0.39"   Right: 0.39"   Top border: Hex 001D7A
EPRI Cover Title	Font: Century Gothic, 28pt   Left justified   Line spacing: Single   Before 100pt   After: 3pt
EPRI Disclaimer	Font: Calibri, 10pt   All Caps   Justified   Line spacing: Single   Before: 7pt   After: 4pt   Left: 0.39"   Right: 0.39"
EPRI Disclaimer Insert	Font: Calibri, 10pt Bold   Left justified   Line spacing: Single   Before: 6pt   After: 4pt   Left: 0.39"   Right: 0.39"
EPRI Disclaimer Title	Font: Century Gothic, 12pt Bold   All Caps   Justified   Line spacing: Single   Before: 55pt   After: 4pt   Left: 0.39"   Right: 0.39"
EPRI Disclaimer TU Blurb	Font: Calibri, 10pt Bold   Left justified   Line spacing: Single   Before: 24pt   After: 4pt
EPRI Executable Box	Font: Calibri, 10pt   Left justified   Line spacing: Exactly 12pt   Before: 18pt   After: 18pt   Left: 0.5"   Hanging: 0.5"   Right: 0.69"   Border: Black
EPRI Figure	Font: Calibri, 12pt   Centered   Line spacing: Single   Before: 14pt   After: 9pt
EPRI Front Matter	Font Calibri, 12pt   Left justified   Line spacing: Single   Before: 9pt   After: 9pt
EPRI Front Matter Bulleted List	Font: Calibri, 12pt   Left justified   Line spacing: Single   Before: 3pt   After: 3pt   Left: 0"   Hanging: 0.25"   Bullet color: Hex 001D7A
EPRI Front Matter Subhead	Font: Century Gothic, 12pt Bold   Left justified   Line spacing: Single   Before: 12pt   After: 3pt   Custom color: Hex 001D7A
EPRI Key Point Figure	Font: Calibri, 12pt   Left justified   Line spacing: Single   Before: 10pt   After: 5pt   Left: 0"   Right: 0.83"
EPRI Key Point Heading	Font: Calibri, 12pt Bold   Left justified   Line spacing: Single   Before: 0pt   After: 0pt   Left: 0"   Right: 0.2"   Custom color: Hex 001D7A
EPRI Key Point Text	Font: Calibri, 12pt   Left justified   Line spacing: Single   Before: 4pt   After: 10pt   Left: 0"   Right: 0.2"
EPRI Lettered List	Font: Calibri, 12pt   Left justified   Line spacing: Single   Before: 3pt   After: 3pt   Left: 0"   Hanging: 0.25"
EPRI Licensed or Restricted Headers	Font: Calibri, 10pt Italic   Centered   Line spacing: Single   Before: 6pt   After: 24pt
EPRI Normal	Font: Calibri, 12pt   Left justified   Line spacing: Single   Before: 9pt   After: 9pt
EPRI Numbered List	Font: Calibri, 12pt   Left justified   Line spacing: Single   Before: 3pt   After: 3pt   Left: 0"   Hanging: 0.25"
EPRI Project Manager	Font Calibri, 12pt   Right justified   Line spacing: Single   Before: 7pt   After: 7pt   Left: 0.83"   Right: 0.5"

Table 3 (continued). Built-in template styles (in alphabetical order)

Name of Style	Style Specifications
EPRI Section Title	Font: Century Gothic, 18pt Bold     All Caps   Center justified   Line spacing: Single   Before: 0pt   After: 18pt   Custom color: Hex 001D7A
EPRI Sub Bulleted List	Font: Calibri, 12pt   Left justified   Line spacing: Single   Before: 3pt   After: 3pt   Left: 0.25"   Hanging: 0.25"   Bullet color: Hex 001D7A
EPRI Sub Bulleted List 2	Font: Calibri, 12pt   Left justified   Line spacing: Single   Before: 3pt   After: 3pt   Left: 0.5"   Hanging: 0.25"   Bullet color: Hex 001D7A
EPRI Subtitle	Font: Century Gothic, 15pt   Left justified   Line spacing: Single   Before: 6pt   After: 3pt   Left: 0.5"   Right: 0.5"
EPRI Table Header	Font: Calibri, 10pt Bold   Centered   Line spacing: Single   Before: 3pt   After: 3pt   Font color: White
EPRI Table Text Bullet	Font: Calibri, 10pt   Left justified   Line spacing: Single   Before: 3pt   After: 3pt   Hanging: 0.13"
EPRI Table Text Centered	Font: Calibri, 10pt   Centered   Line spacing: Single   Before: 3pt   After: 3pt
EPRI Table Text Left	Font: Calibri, 10pt   Left justified   Line spacing: Single   Before: 3pt   After: 3pt
EPRI Table Text Numbered List	Font: Calibri, 10pt   Left justified   Line spacing: Single   Before: 3pt   After: 3pt   Hanging: 0.13"
EPRI Title	Font: Century Gothic, 28pt   Left justified   Line spacing: Single   Before: 100pt   After: 3pt   Left: 0.83"   Right: 0.83"
ES Audience	Font: Calibri, 12pt   Left justified   Line spacing: Single   Before: 6pt   After: 0pt
ES Audience Character	Font: Century Gothic, 12pt   Font Color: Hex 001D7A
ES Body Text	Font Calibri, 12pt   Left justified   Line spacing: Single   Before: 12pt   After: 7pt
ES Bullets	Font: Calibri, 12pt   Left justified   Line spacing: Single   Before: 3pt   After: 0pt   Left: 0"   Hanging: 0.25"   Bullet color: Hex 001D7A
ES Caption	Font: Calibri, 10pt   Left justified   Line spacing: Single   Before: 6pt   After: 6pt   Left: 0"   Right: 0.25"   Font color: Hex 001D7A
ES Product ID	Font: Century Gothic, 11pt   Left justified   Line spacing: Single   Before: 6pt   After: 0pt
ES Product Title	Font: Century Gothic, 13pt   Left justified   Line spacing: Single   Before: 6pt   After: 18pt   Bottom border: Hex 001D7A
ES Subheading	Font: Century Gothic, 12pt   Left justified   Line spacing: Single   Before: 12pt   After: 12pt   Left: 0"   Right: 0.19"   Font Color: Hex 001D7A
ES Subheading Character	Font: Calibri, 12pt   Font Color: Black
Export Control Heading	Font: Calibri, 10pt Bold   Left justified   Line spacing: Exactly 15pt   Before: 0pt   After: 9pt

Table 3 (continued). Built-in template styles (in alphabetical order)

Name of Style	Style Specifications
Export Control Text	Font: Calibri, 10pt   Left justified   Line spacing: Exactly 15pt   Before: 12pt   After: 12pt
Footer	Font: Calibri, 10pt   Left/Right   Line spacing: Single
Footnote Text	Font: Calibri, 10pt   Left justified   Line spacing: Single   Before: 7pt   After: 7pt
Heading 1, Section	Font: Century Gothic, 18pt Bold   All Caps   Left justified   Line spacing: Single   Before: 0pt   After: 7pt   Hanging:.39   Font color and line below: Hex 001D7A  Page break before
Heading 2	Font: Century Gothic, 13pt Bold   Left justified   Line spacing: Single   Before: 20pt   After: 3pt   Font color: Hex 001D7A
Heading 3	Font: Century Gothic, 13pt Bold Italic   Left justified   Line spacing: Single   Before: 12pt   After: 3pt   Font color: Hex 001D7A
Heading 4	Font: Century Gothic, 12pt   Left justified   Line spacing: Single   Before: 12pt   After: 3pt   Font color: Hex 001D7A
Heading 5	Font: Century Gothic, 12pt Italic   Left justified   Line spacing: Single   Before: 12pt   After: 3pt   Font color: Hex 001D7A
Heading 6, Appendix Level	Font: Century Gothic, 18pt Bold   All Caps   Left justified   Line spacing: Single   Before: 0pt   After: 7pt   Hanging:.39   Font color and line below: Hex 001D7A  Page break before
Product ID	Font: Century Gothic, 12pt Bold   Left justified   Line spacing: Single   Before: 24pt   After: 24pt   Left: 0.5"   Right: 0.5"
Table of Figures	Font: Calibri, 12pt   Left justified   Line spacing: Single   Before: 4pt   After: 0pt   Left: 0"   Right: 0.5"  Hanging: .33"
TOC1	Font: Calibri, 12pt Bold   Left justified   Line spacing: Single   Before: 18pt   After: 0pt   Left: 0"   Right: 0.5"  Hanging: .33"
TOC2	Font: Calibri, 12pt   Left justified   Line spacing: Single   Before: 6pt   After: 0pt   Left: 0.34"   Right: 0.5"
TOC3	Font: Calibri, 12pt   Left justified   Line spacing: Single   Before: 6pt   After: 0pt   Left: 0.44"   Right: 0.5"

## Paginating the Report

After styling all the text, figures, tables, and equations, check the layout and pagination of the report.

- Try to flow figures and tables immediately after the paragraph in which they are referenced.
- Preferred usage of white space—½ page theory:
  - If there is more than ½ page of white space:
    - Adjust the table (break across the page) or figure (shrink) to fit on the page.
    - Do not adjust the EPRI Normal style—that is, do not change font size, leading, or spacing of font.
  - If there is less than ½ page of white space, leave as is.
- If a new sub-section starts at the bottom of the page (only two or three lines appear), insert a page-break to start section at top of next page.
- Try to keep bulleted lists on the same page:
  - Do not allow the last bullet item to flow onto the next page.
  - Do not start a bulleted list where only the first bullet appears (and the rest of the list is on the next page).

## 8. QUALITY CONTROL

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Vendors and Publishing staff are responsible for assuring that the files meet the specifications that are listed in this documentation. Please check the following.

### Before Sending Proof Copy Back to EPRI

- Title page
  - Verify title, either with an editor’s information file, or cross-checked with the original email received from the communications consultant.
  - Check that Software ID # is correct on the cover, title page, and acknowledgments page.
  - Check that the month of publication is correct.
  - Confirm that the Project Manager’s last name and 1st initial is correct.
  - Check that the NQA/non-NQA information appears if appropriate.
- Disclaimer Page
  - Confirm that the correct Auto Text entry is used.
  - Check that the contractor’s name is correct.
- Acknowledgments Page
  - Check that the text from the editor’s file (if available) is used.
  - Confirm that any additional information aside from the standard author or investigator is added.
  - Verify that the citation information from either the editor’s verification page or the original submission is added.
- Running Headers
  - Verify that the appropriate licensed header appears in header.
- Figures
  - Check that each figure matches the original submitted by Project Manager.
  - Check that each figure is proportionally consistent throughout the report. If there are significant differences, adjust the sizes appropriately.
  - Check that all figure labels are standard text size or close to it (between 10 and 12pt text).
- Check that all equations are consistent throughout the report.
- Check that all tables are consistent throughout the report.
- Verify that the references are styled consistently.
- Verify that no symbols are missing.
- Do not alter line and paragraph spacing within the body text unless absolutely necessary.

- Look for bad breaks, including but not limited to, bad line breaks, bad word breaks, and bad list breaks.
- Run TOC, LOF, and LOT macros.

## **Report Sequence**

### **Front Matter**

- Title Page
- Disclaimer Page
- Acknowledgments Page
- Software Description Page
- Mandatory Software installation Information Page
- Other optional front matter sections
- Table of Contents
- List of Figures
- List of Tables

### **Software Manual Text**

- Chapters
- Bibliography/References (optional)

### **Appendices**

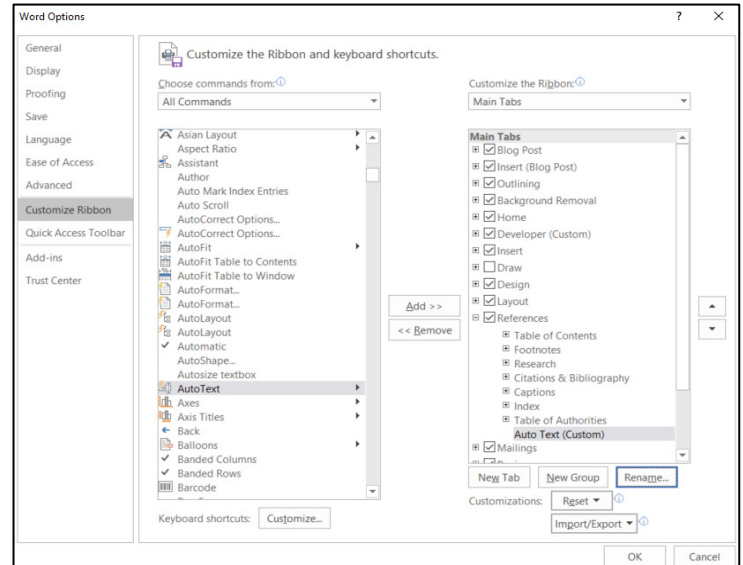
- Glossary (optional)
- Index (optional)

# A. USING AUTO TEXT

## To Add Auto Text and Macros to the Ribbon

Since the EPRI SW template contains Auto Text and Macros as well as built-in styles, it is advisable to have easy access to them in Word. Follow these steps to add these buttons to the Ribbon in Word.

1. Click **File > Options > Customize Ribbon**.
2. On the right side under *Main Tabs*, make sure that **Home** is highlighted, then click **New Group**.
3. Highlight the resulting new group and click **Rename**.
4. Rename the new group *Auto Text*.
5. On the left side, pull down the *Choose Command from:* box and select **All Commands**.
6. Select **Auto Text** and be sure the new group now called *Auto Text (Custom)* on the right side is still highlighted.
7. Click **Add** (located in the middle of the two columns).
8. Repeat process for adding a Macro button to the Ribbon.



## How to Insert an AutoText Entry

To insert an AutoText entry, click on the quick access tool part and choose the appropriate text to use.


a

2


3

**Back Cover**

**Back Cover ExportControl Wording**


 **Export Control Restrictions**  
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 Save Selection to AutoText Gallery

▼



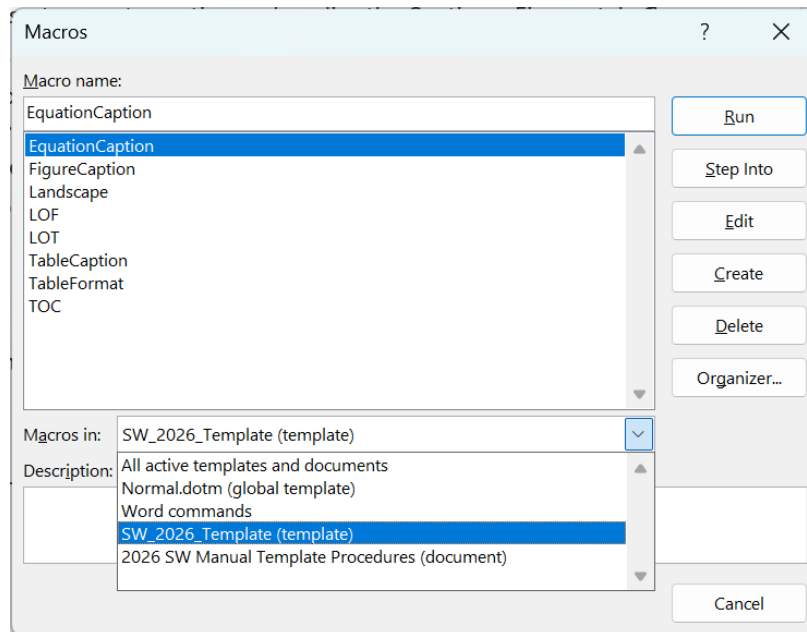
## B. MACROS

The following macros must be used to accommodate new features in this template.

- **Note:** EquationCaption, FigureCaption, and TableCaption macros should be used *instead of* the typical **References > Insert Caption** method. The macro performs several steps that will style each caption properly.
- A description of each macro follows the image.
  - **EquationCaption:** This macro inserts an auto caption and applies the Caption – Equation style.
  - **FigureCaption:** This macro inserts an auto caption and applies the Caption – Figure style.
  - **TableCaption:** This macro inserts an auto caption and applies the Caption – Table style.
  - **Landscape:** Use this macro to switch between portrait and landscape and back again. It eliminates the need to add a section break and re-set the number format.
  - **TOC/LOF/LOT:** Use these macros to insert the Table of Contents, Figures, and Tables.
  - **TableFormat:** Use this macro to set the table properties.

### Accessing Macros

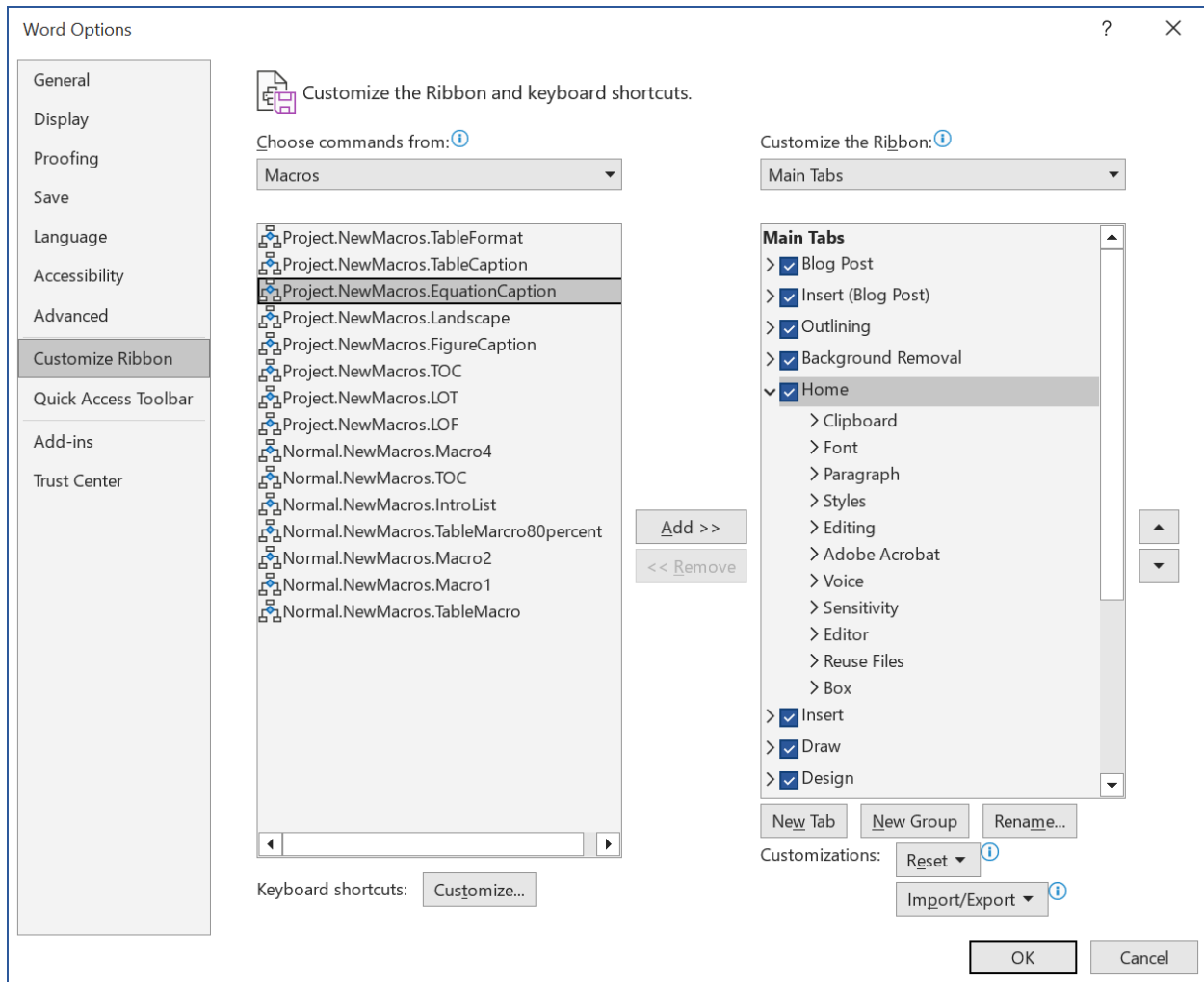
1. Click **Ctrl + F8**.
2. Choose **SW\_2026\_Template (template)** from the *Macros in:* dropdown menu.



3. Choose the macro you want to run.
4. Click **Run** or hit **Enter**.

## Adding Macros to the Ribbon

1. Click the **File** button and choose **Options**.
2. Select **Customize Ribbon**.
3. Choose **Macros** from the *Choose from* box.
4. Highlight the macros desired and select **Add**.
5. The Macros will appear on the ribbon.



## C. MANIPULATING FIGURES

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### To Make a Floating Figure in Line with Text

1. Right click on the figure and select **Wrap Text**.
2. Select **In line with text** on the dropdown menu.

### To Change a Figure with Free Floating Components into a Single Picture

1. Select all of the components of the figure. For example, the figure may consist of a photograph (inserted TIFF file) with text boxes and drawing objects (arrows) floating above or around it.

Free floating and inline components cannot be selected at the same time. Change in line components to free floating in order to select them. Be careful not to disturb the order of the objects when doing this.

2. Press **Ctrl + x**.
3. On the *Home* tab, pull down the arrow under the *Paste* button. Choose **Paste Special...** Select **Picture (Windows Metafile)**. Check the consolidated image to make sure that all of the components are placed correctly.
4. Change the floating picture to inline.
5. Apply the *EPRI Figure* style to the figure.
6. Insert the caption and caption title (see Section 6).

## D. TROUBLESHOOTING

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### Attaching the EPRI Software Manual Template

Do not attach the template to an existing non-template file. Instead, copy and paste data into an empty EPRI Software Manual template document.

### Closing Documents

When closing a document, Word might ask to save changes to the template, click **No**. If it has not been saved at all, the title will default to “Document 1.” Please re-name this to meet the EPRI naming requirements.

### Numbered Lists

- Word often interferes with numbered list information. To start the list at 1, highlight the numbered list and right click. Select **Restart At 1**. If this does not work, right click the list, and select **Customize**. In the *Start At* box, input the correct number to start the list. If the font is affected, right click **Font** to check that it has the correct style.
- If styling a heading or subheading with a number at the beginning of the line of text, highlight the whole line of text. To do this, put the cursor on the left side of the line and when it turns to an arrow, click the left mouse button. Otherwise, Word views it as a numbered list and does not style it correctly.



## Export Control Restrictions

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Founded in 1972, EPRI is the world's preeminent independent, non-profit energy research and development organization, with offices around the world. EPRI's trusted experts collaborate with more than 450 companies in 45 countries, driving innovation to ensure the public has clean, safe, reliable, and affordable access to electricity across the globe. Together...Shaping the Future of Energy®

### Program:

Insert Program Name

Insert Program Name

SoftwareID

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## EPRI

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