UNIVERSITY
of
GLASGOW

Effective Records Management Project
Committee Documents System
CDocS User Guide

Agenda, Minutes & Summary Report

for Word 8/ Word for Windows 97
The Effective Records Management Project

Glasgow University’s Information Strategy emphasises learning to use information more effectively, rather than installing increasingly complex systems; and making the University aware of issues and opportunities involved in the creation, processing and analysis of information. The Effective Records Management project aims to provide useful tools and protocols for the creation and management of the digital document to facilitate effective use of information.

CDocS user guide: agenda, minutes and summary reports

The documents of a committee comprise the agenda and minutes for each meeting of the committee, reports and papers to and from those meetings, plus any business transacted by the members of the committee between meetings. CDocS provides tools for the creation of these documents in a structured form by the addition of critical structural information to the data content providing a sound basis for conversions to new media. Additionally metadata - data about the document - is created. This metadata is available to all versions of the document for use in further processing and is invaluable for searching and location, cataloguing, abstracting, storage and archiving.

Sections 1 & 2 of this user guide explain the use of the tools for the creation of agenda, minutes, and summary reports. A summary report is a report following the outline of the minutes, which passes between committees; other reports are better accommodated by the CDocS Paper and Report tool.

Section 3 guides the user through the validation of document structure using the check styles facility, shows how to add hypertext links ready for conversion of the document to on-line media. And provides step-by-step instructions for the conversion and uploading of document onto the university web server (The upload instructions are specific to the committees within the CDocS system at Glasgow University.).

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SECTION 1 CREATING A DOCUMENT

The CDocS wizard is a tool for creating skeletal documents. It can be used to generate skeletons for three types of documents, agenda, minutes, and summary report, complying with the Glasgow University recommendations for the layout of these documents.

The CDocS wizard comprises a series of dialogue boxes that are displayed on screen. The information entered in the dialogue box fields is used both to create a structured document and as the basis for metadata collection.

SECTION 1 of this guide contains step-by-step instructions for creating documents. For help with adding content to the document once the wizard stage is complete, move to SECTION 2 - Editing.

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1 University of Glasgow Style Manual for Committee Clerks (1998)
1.1 Agenda

The CDocS Wizard generates an agenda from the information entered into the wizard fields and presents it on screen as a Word document. The agenda contains the structure and metadata necessary for automated conversion to other presentations (e.g. for dissemination via the WWW).

Take care when entering data into the wizard fields: the information given will appear in the Word document but it is also stored as metadata. If possible it should not be corrected by overwriting in the Word document because this will create a disparity between the document content and its metadata.

1.1.1 item numbering

Agenda item numbering always starts at 1. The display in the wizard dialogue starts at 3 because the first two items, Minutes of the Last Meeting and Matters Arising, are inserted automatically.

1.1.2 item headings

You will need to supply a heading for each item and sub-item. The heading be clear and concise: this heading is used subsequently in the minutes and for indexing. Ideally the heading will be the same as, or at least should tie in with, the title of any report or paper pertaining to the item - use of the same wording helps users, particularly users of on-line versions, to orient within the papers.

1.1.3 document identifiers

The CDocS Wizard will create a Document Identifier for the agenda, this will be displayed top right of the document in the form:

gla.[origination committee]/[destination committee]/Agenda/[meeting date]

The (same) committee code is entered for both origination committee and destination committee to indicate an internal document. Do not alter this ID - it will be used to identify and catalogue the agenda.
1.1.4 creating an agenda

1. Open WORD (Word 8 or Word for Windows 97)  
2. From the FILE menu choose NEW  
3. Select CMMITTEE WIZARD template (either double-click on Cmmitee Wizard or select it and click OKAY)

A series of dialogue boxes lead through the steps of producing the agenda.  
Dialogue boxes are numbered in the lower right corner.

Unable to find the wizard icon to launch the Committee Document System Wizard?

- Are you in WORD? You cannot launch the wizard from WINDOWS EXPLORER.  
- Are you to using the NEW button? Select NEW from the FILE menu instead - the NEW button on the Standard Toolbar bypasses the option of choosing a template.
dialogue box 1: originating committee

1. Select the committee name from the list.
2. Use the radio buttons to choose the document type Agenda.
3. Click OKAY.

Originating committee
This dialog creates a skeleton agenda, minutes or report document for a committee meeting.

Select the name of the committee originating the document:

- Advisory Committee on Standards, Guidelines and Protocols
- Information Services Committee
- Information Strategy Steering Group
- Information Users Committee
- Library Committee

Select a type of document:

- Agenda
- Minutes
- Summary Report

[OK]
dialogue box 2: meeting details

The most recently entered details for the next meeting of this committee will be displayed. Add or update these details as necessary.

Take care! The information displayed is the last data stored for this committee, but it may not be correct! It is important to get these entries right because they not only appear in the document but are also stored as metadata.

1. Enter the date and time of the forthcoming meeting.
2. Select the meeting location from the location pick-list, or type in if the location is not on the list.
3. Check that the date of previous meeting is correct.
4. Use the NEXT button to proceed.

dialogue box 3

1. Type in the name and email address of the committee clerk (phone number optional). If these have been carried forward from a previous document, check they are correct.
2. Use the NEXT button to proceed.
Section 1 Creating a Document

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editing the item list (dialogue boxes 4 & 5)

Dialogue boxes 4 and 5 are designed to help you enter and edit the item list. Use the BACK and NEXT buttons to move back and forth between these dialogue boxes. This will allow you to edit and re-order the item list until it meets your requirements.

1.1.4.1 the URL field

Automatic links can be set up between the on-line version of the agenda and on-line documents associated with the items. If an item has been carried forward from a previous meeting and has an on-line document associated with it, a link will already exist and the appropriate URL will be displayed in the URL box.

If a new item refers to an on-line document, you may type in the URL of the document here if you wish. However, most users prefer to add the link once the document has been generated, using the Create link facility. See SECTION 3.1 Adding Links

1.1.4.2 to indicate a sub-item

- Tick the sub-heading box alongside the heading

The item will be appropriately numbered and indented as a sub-item of the item above (If there is no room to enter a sub-item immediately below the parent item, enter it at the bottom of the list and move up in dialogue box 5).

To decide whether an item should be a sub-item it is helpful to consider whether it is independent of the other items. Sub-items are those which are part of a "parent" item in the list.

1.1.4.3 numbering

The numbering which will be applied in the agenda is displayed to the left of the item list. Agenda numbering starts at 1. Sub-items are numbered .1, .2 etc.. The numbering updates as you work.

_tip_ - To refresh the screen click on the MORE AGENDA ITEMS button then on the PREVIOUS AGENDA ITEMS buttons.
dialogue box 4: item list entry

For your convenience, item headings from the previous meeting have been included. Add and remove items as necessary. **Do not worry about the order of item headings at this point.** You can re-order the list in dialogue box 5.

**Note:** headings Minutes of the Last Meeting; Matters Arising; Any Other Business and Date of Next Meeting are generated automatically and should not be entered.

- **To add new items either:**
  - overtype an unwanted item (if the old item had a URL remember to delete it) *or*
  - go to the end of the list (use the MORE AGENDA ITEMS button if necessary) and type the new item into the first empty slot. You can re-order later.

- **To remove an item either:**
  - overtype with a new item heading *or*
  - use the re-order facility in Dialogue box 5 to shuffle the unwanted item to the end of the list; then return to Dialogue box 4 and delete: don’t leave gaps in the item list.

dialogue box 5: item list order

The item list is displayed.

Select any items to be re-ordered and use MOVE UP and MOVE DOWN buttons to rearrange list as required

Move items to be deleted to the end of the list. Use the BACK button to return to dialogue box 4 to delete (select with mouse use delete key)
Section 1 Creating a Document

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Once you have finished ordering the item list:

1. Check item list for gaps. (Move other items up to fill any gaps)
2. Check the sub-item box is ticked for all sub-items (and blank for main items)
3. Once the item list is finished use NEXT button to proceed to dialogue box 6

**dialogue box 6: finish**

1. The wizard part of the document creation is complete. Use the BACK button to review the information you have entered, or click the FINISH button.
2. You see the familiar SAVE AS dialogue box. A filename is supplied - the digital form of the date of the meeting. *Do not change this file name.* Save the agenda in an Agenda directory for the appropriate committee.
3. The agenda is displayed on screen.

**1.1.5 the agenda document**

You may add further items, links and commentary to the agenda if you wish.

If the item heading is the name of the report or paper, it is effective to use the heading itself as the anchor text, and this is the form of the links added by the wizard. However, if there is more than one paper, or the paper considers only one aspect of the item, it is better to refer to it in the text, and link from that reference. The connection between the anchor text and the paper needs to be obvious; the reader should not be surprised by the paper!

If you have not used the CDocS system previously some features used for the document display and the Word screen may be new to you: please read **SECTION 2.1 Overview of the CDocS Environment**.

It is important to style new text correctly. To pick the right style, follow the styling of similar elements already in the agenda, or on the specimen agenda (**APPENDIX III** at the back of this user guide). If you need help with editing, full instructions are given in **SECTION 2: Editing**

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**If the agenda item list needs to be amended, either:**

- Re-run the wizard - the items will be listed as you have entered them this time - and make the corrections. *or*
- Correct the item list in the Word document and use the SAVE RTF button to inform CDocS of the changes. If you add new items to the item list *in the document* remember to update the numbering!

---

**Once you have finished editing the agenda, remember to**

- **check the styles are valid** ([CHECKSTYLES button])** SECTION 3.1 Checking Styles**
- **create links to the papers of the meeting** ([CREATELINK button])** SECTION 3.2 Adding Links**
- **save the document** ([SAVEDOC button])**
- **save an RTF version** ([SAVERTF button])** SECTION 3.3 Saving an rtf version of the document**
1.2 Minutes

An outline of the minutes is produced using the information given for the agenda. This saves time in re-entering detail, and it conserves the structure and order of the meeting items, and the exact wording of the headings, between the agenda and the minutes.

It is important to check that the information carried forward from the agenda is correct, and to make any necessary changes during the wizard stage. The information entered into the wizard is used to create metadata, therefore corrections made after the wizard stage will not be reflected in the metadata.

The printable versions (.doc .rtf) of the minutes document created by the wizard are styled for printing following the University guidelines for these documents. The HTML version is styled for display on-line.

1.2.1 minute item headings,

Item headings should be clear and concise. Minute item headings will usually be the same as appeared on the agenda. Major headings (style ItemHead1) and sub-headings (style ItemHead2) will be included in the table of contents. It is helpful to the users (particularly of on-line versions of the documents) if the item heading is the same as or at least similar to the title of the paper that it references.

1.2.2 item reference numbers

Most university committees number items sequentially throughout the academic year so that each item is uniquely referenced. Item numbers are entered automatically by the wizard and will roll on from the final item in the previous minutes, if the wizard was used to create it. The current item number is displayed in wizard dialogue box 2 and can be overtyped if not correct.

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1. data about the document: familiar examples include title, author, creation date, publisher, document ID
1.2.4 generating a minutes document

1. Open WORD (Word 8 or Word for Windows 97).
2. Choose FILE, NEW.
3. Select CMITTEE WIZARD (either double-click on Cmmittee Wizard icon or select it and click OKAY).

Unable to find the wizard icon to launch the Committee Document System Wizard?

- Are you in WORD? You cannot launch the wizard from WINDOWS EXPLORER.
- Are you to using the NEW button? Select NEW from the FILE menu instead - the NEW button on the Standard Toolbar bypasses the option of choosing a template.

A series of dialogue boxes lead through the steps of laying out the minutes document.

Dialogue boxes are numbered in the lower right corner.

**dialogue box 1: originating committee**

1. Select the committee name from the list.
2. Use the radio buttons to choose the document type Minutes.
3. OKAY
dialogue box 2: meeting details

The details of the meeting of this committee will be displayed as entered on the agenda. Edit as necessary by overtyping.

1. Check that all the entries carried forward from the agenda are correct.
2. Check the number of the first item. Numbers continue sequentially from the last item of the previous meeting.
3. Use the NEXT button to proceed.

dialogue box 3: clerk details

1. Check that the name and email address of the committee clerk are correct (phone number optional).
2. Use the NEXT button to proceed.

editing the item list (dialogue boxes 4 & 5)

Dialogue boxes 4 and 5 are designed to help you enter and edit the item list. Use the BACK and NEXT buttons to move back and forth between these dialogue boxes. This will allow you to edit and re-order the item list until it meets your requirements.

1.2.4.1 the URL field

Automatic links can be set up between the on-line version of the minutes and on-line documents associated with the items. Linked items carried forward from the agenda will have the appropriate URL displayed in the URL box - if you do not wish to link the item in the minutes delete the whole content of the URL box.

If a new item refers to an on-line document, you may type in the URL of the document here if you wish. However, most users prefer to add the link once the document has been generated, using the Create Link facility. See Section 3.2 Linking

1.2.4.2 to indicate a sub-item

- Tick the sub-heading box alongside the heading

The item will be appropriately numbered and indented as a sub-item of the item above. If there is no room to enter a sub-item immediately below its parent item, enter it at the end of the list and move it up in dialogue box 5.

To decide whether an item should be a sub-item it is helpful to consider whether it is independent of the other items. Sub-items are those which are part of a "parent" item in the list - for example the items which appear under 'Any Other Business'.

1.2.4.3 numbering

On the left of the items the numbering which will be applied in the minutes is displayed. Minutes numbering rolls-on through the academic year, so that the item list starts with the next number after the last item of the previous meeting. Numbering updates as you work. To refresh the screen click on the MORE AGENDA ITEMS button then on the PREVIOUS AGENDA ITEMS buttons.
dialogue box 4: item list entry

<table>
<thead>
<tr>
<th>Item heading</th>
<th>URL of related document</th>
<th>Sub-heading?</th>
</tr>
</thead>
<tbody>
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<td>Finance Report</td>
<td><a href="http://www.deptname.qla.ac.uk/commit">www.deptname.qla.ac.uk/commit</a></td>
<td></td>
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<tr>
<td>Proposed Changes to Library Opening Hours</td>
<td></td>
<td></td>
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<tr>
<td>Survey of current use</td>
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</tr>
<tr>
<td>Proposed Extension</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Progress Report for New Building</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Tip: Minutes of Last Meeting, Matters Arising, Any Other Business, and Date of Next Meeting items will be added automatically. You can rearrange the sequence of items on the next page.

For your convenience item headings from the previous meeting have been included. Edit these as necessary. Do not worry about the order of the items at this point. You can re-order the list in dialogue box 5.

**note:** headings Minutes of the Last Meeting; Matters Arising; Any Other Business and Date of Next Meeting are generated automatically and should not be typed into the list

- **To add new items either:**
  - overtype an unwanted item (if there is a URL remember to delete it) **or**
  - go to the end of the list (use the MORE AGENDA ITEMS button if necessary) and type the new item into the **first** empty slot. You can re-order later.

- **To remove an item either:**
  - overtype with a new item heading **or**
  - use the re-order facility in dialogue box 5 to shuffle the unwanted item to the end of the list: don’t leave gaps in the item list. Return to dialogue box 4 to delete the item.

**dialogue box 5: item list order**

- Select any items to be re-ordered and use MOVE UP and MOVE DOWN buttons to rearrange list as required

- Items to be deleted:
to avoid leaving gaps in the item list move unwanted items to the end. Use the BACK button to return to dialogue box 4. Delete (select with mouse use delete key).

- Make sure sub-items are indicated
- Once the list is finished use NEXT button to proceed to dialogue box 6

**dialogue box 6: finish**

1. The wizard part of the document creation is complete. Use the BACK button to review the information you have entered, or click the FINISH button.

2. You see the familiar SAVE AS dialogue box. A filename is supplied - the digital form of the date of the meeting. *Do not change this file name*. Save the minutes in a Minutes directory for the appropriate committee.

3. The minutes document is displayed on screen.

If you have not used the CDocS system previously some features of the document display and the Word screen may be new to you: please read SECTION 2.1 *Overview of the CDocS Environment*.

### 1.2.5 the minutes document:

#### 1.2.5.1. the document identifier

A unique identifier for the minutes is displayed top right of the document in the form:

```
gla.[origination committee]/[destination committee]/Minutes/[meeting date]
```

The (same) committee code is entered for both origination committee and destination committee to indicate an internal document.

#### 1.2.5.2. "present", "in attendance" and "apologies" list

A list of all the committee members is inserted into minutes documents under the heading "present". It is intended that this list be edited appropriately for each meeting. The entries are spaced out, one entry per line, and ordered alphabetically by surname to make it easier to check off actual attendees. The "present" list is displayed in forward versions of the minutes as one unbroken paragraph.

Use cut-and-paste to move absent member’s details into a list under the "apologies" heading. Absent members can be either deleted or moved to ‘apologies’ according to the tradition of the committee¹. Select the entire entry, including the paragraph mark at the end of the line (*tip* go to the left margin until the cursor changes to an in-pointing arrow and click once to select.). Either Delete or use cut-&-paste to move the entry to apologies.

As the membership changes, update the membership list; **do not simply type names in the minutes!**

Adding names in the minutes document is tedious and exacting because name entries are highly formatted. Names formatted incorrectly can disappear completely in onward versions of the document. It is much easier to put everyone in the membership list and let the wizard do the work for you. For instructions see SECTION 4.3.2.2. *Updating the committee members list*.

---

¹ The university guidelines suggest that only members who actually do send apologies should be included in the apology list
The "in attendance" list comprises people at the meeting but who are not members; therefore, they are not on the members list. A facility enabling these names to be entered with formatting applied, is currently being developed.

1.2.5.3. choosing styles

The skeleton of the minutes is now ready for you to type in the content. Ideally, each item and sub-item should have explanatory text, followed by an action and disposal where appropriate. To enable automated conversion to new media these elements must be styled correctly: use only CDocS styles. To pick the correct style follow the styling of similar elements already in the minutes, or use the specimen minutes in Appendix III at the back of this document as a guide. If you need more help with editing, full instructions are given in SECTION 2: Editing.

1.2.5.4. adding a new item/sub-item in the document

Ideally all items and sub-items will be entered by the wizard. However, there may be occasions when you need to add items to the list after the wizard stage of creation is complete - if you re-run the wizard you will loose any content to have added since.

ItemHead1

Major headings should be styled ItemHead1. Continue the rolling item numbering from the previous item. Remember to amend the numbering of the subsequent items - format the numbers carefully following the formatting on the other items, precise formatting is critical during the conversion process.

Sub-items within the major headings cause more trouble. You may either use ItemHead2 or ItemHead1a for the heading and subsequent text etc should follow this choice. ItemHead2 is usually right and always acceptable, use 2 if in doubt.

ItemHead2

ItemHead 2 is the style used for all sub-items carried forward from the agenda or entered in the wizard. Headings styled ItemHead2 are automatically included in the table of contents, which is displayed at the top of the on-line version of the document. Use ItemHead2 for any item you think you may refer back to in the future.

ItemHead2 numbering follows the standard numbering system of adding point 1,2,3.. to the main item number. For example:

---

1 Sept 2000
ISC/1999/12 Main item heading (twelfth item of the 1999/2000 academic session for the Information Strategy Committee)

ISC/1999/12.1 First sub-item heading

ISC/1999/12.2 Second sub-item heading

ItemHead1a

If the sub-items are minor you may not wish to have them included in the table of contents. In this case you can use ItemHead1a, but notice that if this item is referenced later you will not be able to link straight to it. Headings styled ItemHead1a are not included in the table of contents of the web version of the document.

ItemHead1a numbering. Add alpha numbering (a,b,c,..) to the main item number. For example:

ISC/1999/12 Main item heading

ISC/1999/12.a) first sub-item heading

ISC/1999/12.b) second sub-item heading

1.2.5.5. including references and links in item headings

If the item heading is the name of the report or paper, it is effective to use the item heading itself as the anchor text. However, if there is more than one paper, or the paper forms only one aspect of the item, it is better to make a reference to it in the text. The connection between the anchor text and the paper needs to be obvious; the reader should not be surprised by the paper!

The agenda will persist, linking all items to the associated papers. Therefore, whether some or all the links are included in the minutes is a matter for the clerk or convener to decide. Links in the agenda item headings will be automatically included in the minutes. These can be removed most easily by deleting the entire word plus the space before it and retyping it.

Don’t get confused between the number of the item in this document and any cross reference to the subject heading from another document. ItemHead1a numbering begins with the number of the item in this minute document: item numbers in the minutes are always sequential. Put the subject heading immediately after the item number.

If you are linking to the paper, you can use the subject heading to form the anchor text.

For example:

IUC/1999/3.3 IT Course (European Computing Driving Licence)

item number subject heading used as link to paper

If you are linking to another document which refers to the item (e.g. the subject was discussed at a previous meeting and you wish to refer to its entry in the previous minutes), put the ‘other document’ reference number at the end of the heading, and enclose it in parenthesis. Use this text when you create the link. This prevents confusion between the number of the item in the current document and references to it in previous documents.
For example:

ISC/1999/2.6 Policy Statements (ISC/1998/20.2)

The specimen minutes in APPENDIX III at the end of this document, shows examples of item headings. To add links see SECTION 3.2 Adding Links.

For more help with adding content, move to Section 2 Editing.

1.2.5.6. Minutes check-list

Once you have finished editing the minutes, remember to

- check the styles are valid (CHECKSTYLES button)
- create links to the papers of the meeting (CREATELINK button)
- save the document (SAVEDOC button)
- save an RTF version (SAVERTF button)
- upload the draft minutes to the university web-site
- check the on-line minutes
- email the membership with the URL of the draft minutes
- approve the minutes (SECTION 3.5 Approving the minutes on-line)
1.3 Summary Report

This option is intended only for the creation of a summary report of a committee meeting and follows the outline of the minutes. The CDocS Paper & Report Wizard can better accommodate general reports.

If the agenda for this meeting was created using the wizard the summary report can be derived from the agenda item list. This option saves time in re-entering detail and it conserves the structure and order of the meeting items in each document that applies to it.

1.3.1 creating a summary report

1. Open WORD (Word 8 or Word for Windows 97)
2. Choose FILE, NEW
3. Select CMMTEE WIZARD template (either double-click on Cmmttee Wizard or select it and click OK)

   A series of dialogue boxes lead through the steps of laying out the report. Dialogue boxes are numbered in the lower right corner.

---

**Unable to find the wizard icon to launch the Cmmtee Wizard?**

- Are you in WORD? You cannot launch the Wizard from WINDOWS EXPLORER.
- Are you to using the NEW button? Select NEW from the FILE menu instead - the NEW button on the Standard Toolbar bypasses the option of choosing a template.
dialogue box 1: originating committee

1. Select the name of the committee from which the report originates.
2. Use the radio buttons to choose the document type SUMMARY REPORT.
3. OKAY.
dialogue box 2: receiving committee

1. From the committee name list, select the name of the committee to which the report will be submitted.
2. Enter the date of the meeting to which the report will be submitted. Conform to the date style dd/mm/yyyy.
3. If the wizard has been used to create the minutes of the meeting, you will be offered the option to include the item headings from the minutes in the report. Note this option is available only for a report following a minute created by the wizard. Otherwise this dialogue does not appear.
   - Choose YES to include the item headings. Item headings can be altered later.
   - Choose NO. The Wizard creates an empty report document.
4. Click OKAY. The wizard part of the document creation is complete.
5. You see the familiar Save As dialogue box. You must provide a filename for your document. Save in a Reports directory for the appropriate committee.
6. The skeletal report document is displayed on screen.
If you have not used the CDocS system previously some features of the document display and the Word screen may be new to you: please read SECTION 2.1 *Overview of the CDocS Environment*.

For help with adding the document narrative, move to SECTION 2 *Editing*.

*Once you have finished editing the summary report, remember to*

- check the styles are valid (CHECKSTYLES button)
  SECTION 3.1 Checking Styles
- create links to the papers of the meeting (CREATELINK button)
  SECTION 3.2 Adding Links
- save the document (SAVEDOC button)
- save an RTF version (SAVERTF button)
  SECTION 3.3 Saving an rtf version of the document
- upload the files to the university web-site: choose the receiving committee for upload destination¹
  SECTION 3.4 Uploading to the University Web-Site.

¹ Upload location for summary reports has been changed from originating to receiving committee.
SECTION 2  EDITING

This section explains the structure and appearance of the skeletal document created by the CDocS wizard, the layout of the CDocS screen, and the use of CDocS features for adding context and editing the document.

The section is divided into three parts.

2.1 **CDocS desktop** describes the appearance and available features of the CDocS desktop.

2.2 **Adding content to the skeletal document** provides instructions for editing and styling text.

2.3 **Style choice** explains how to select appropriate styles for your document content.

Section 2 contents

2.1 The CDocS desktop
   2.1.1 overview of the skeletal document  
   2.1.2 the style bar  
   2.1.3 the CDocS toolbar  
      2.1.3.1 CreateLink button  
      2.1.3.2 EnterPersName button  
      2.1.3.3 SaveDoc button  
      2.1.3.4 SaveRTF button  
      2.1.3.5 CheckStyles button  
      2.1.3.6 SwitchOffColour button  
      2.1.3.7 style buttons  
      2.1.3.8 the styles button bars  

2.2 **Adding content to the skeletal document**  
   2.2.1 adding new text in the appropriate style  
   2.2.2 changing the style  
   2.2.3 changing the level of an item  
   2.2.4 adding another item  
   2.2.5 cut-&-paste from external documents  
   2.2.6 auto-numbering  
   2.2.7 adding emphasis!  
   2.2.8 tables  

2.3 **Style choice**  
   2.3.1 what is an item?  
   2.3.2 choosing an item level (red, yellow etc)  
   2.3.4 choosing a style to match content  
   2.3.5 styles in the agenda  
   2.3.6 styling the minutes  
   2.3.7 summary report styles
2.1 The CDocS desktop
2.1.1 overview of the skeletal document

The skeletal document comprises a block of head information, the body of the document containing item information if applicable, and a block of end information.

*note:* If possible do not alter the information entered by the wizard because it is already stored as metadata. Altering this information in the document will create a disparity between the document and the metadata. For example: If the title is overwritten in the document there will be two titles, the original one by which the document is catalogued, and the altered title appearing on the document.

The CDocS desktop changes the usual appearance of Word. Some Word options have been switched on and new features added to the Word environment, which enable the creator to see and manipulate the logical structure of the document.

The document is in Normal view. This allows the style bar to be displayed. Non-printing characters space ( ), paragraph mark (¶), and tab (→) are switched on. To view the document as it will appear if printed use PRINT PREVIEW from the FILE menu.

2.1.2 the style bar

A style bar is displayed down the left side of the document. This shows how the document has been styled. The name of the style is shown alongside the top line of each paragraph or element. Logical naming of styles enables the relationship between them to be readily grasped, e.g. ItemHead1 for main item headings should be followed by ItemText1 for main item text.

Style information is used to label components of the document when it is converted to other media. It is therefore important to use the Committee Document System styles and not to create the same apparent effect using Word formatting.

<table>
<thead>
<tr>
<th>If the style bar is not visible:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Select NORMAL from the VIEW menu.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>If the style bar is still not visible:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Select OPTIONS from the TOOLS menu, choose the VIEW tab, check the VERTICAL SCROLL BAR box and increase STYLE AREA WIDTH to approximately 2 cm.</td>
</tr>
</tbody>
</table>

2.1.3 the CDocS toolbar

When the skeletal document is viewed the CDocS toolbar appears at the top of the screen below the Standard and Formatting toolbars that are usually present in Word.

<table>
<thead>
<tr>
<th>Create Link</th>
<th>Enter PersName</th>
<th>Save Doc</th>
<th>Save RTF</th>
<th>Check Styles</th>
<th>Switch Off Colour</th>
</tr>
</thead>
</table>

CDocS Tool toolbar

The buttons on the toolbar make commonly required CDocS features available for easy use.

2.1.3.1 CreateLink button

The CreateLink button enables a link to another document to be embedded within the document. The link is functional when the document is converted for on-line display. For full instructions, refer to SECTION 3.2 Linking
2.1.3.2 EnterPersName button

(Enter Person Name) This button opens the Personal Names Dialogue box that contains a list of names of university staff members. Select the required name by clicking (once) on it. The name should then appear in the text entry box above the list. You can use the scroll bar to move up and down the list if the name that you want is not visible - if the first few letters of the name are typed into the text box the rest of the entry will appear.

![Personal Names Dialogue Box]

Decide which of the five formatting options the Person Name entry should take:

- **Full:** Name: Dr J Currall Computing Service j.currall@compserv.gla.ac.uk
- **Name(long):** Dr J Currall
- **Name(short):** Dr Currall
- **Action:** JC
- **E-mail:** j.currall@compserv.gla.ac.uk

It may seem easier just to type the name in, particularly if you only need the initials. However, using the EnterPersName facility keeps name entries standardised and will allow the entry to be found when the document is searched by name.

2.1.3.3 SaveDoc button

The SaveDoc button saves an up-to-the-minute version of the document in Word format. For **agenda** and **minutes** documents a meeting date file name is provided - do not change! For **reports** and **papers**, the creator must give the document a filename; usefully, this could be the same as the text identifier in the document ID.

The creator must decide where to save the document. Ideally create a directory specific to the committee, and have Agenda, Minutes and Papers directories within it. Always save agenda and minutes in Agenda and Minutes directories to avoid confusion between these two documents.
2.1.3.4 SaveRTF button

The SaveRTF button saves an RTF (Rich Text Format) version of your document. The RTF version is more readily accessed by applications outside Word and is therefore used as a basis for conversion of the document to other presentations (i.e. for web publication and as a platform independent format for storage).

2.1.3.5 CheckStyles button

The CheckStyles button launches a style validation routine that goes through the document and checks it against the appropriate template for style errors.

An error box appears if there is a style allocation error, the incorrect style is highlighted in the document. The style should be changed and Check Styles run again. See SECTION 3.2 Check Styles Routine.

If the styles are valid the style checker shows a styles valid box (Okay this to remove it from the screen) and imposes toolbar colour matched highlighter to all the styled elements in the document. This allows the creator to see any errors of level allocation. Use the SwitchOffColour button to remove this highlighting (Particularly don’t print with the highlighter still on: the text is barely readable).

2.1.3.6 SwitchOffColour button

Turns off the highlighting imposed by the CheckStyles validation routine.

2.1.3.7 style buttons

The STYLE buttons are a set of coloured buttons showing and hiding the styles button bars. These are toggle buttons - click to show: click again to hide.

2.1.3.8 the styles button bars

The style button bars are displayed to the right and left alongside the document. For ease of use, the style button bars are colour coded:

- **red** for items at level 1 (i.e. main items)
aqua for items at level 1a
yellow for items at level 2
pink for items at level 2a

level 1 button bar for a minutes document

style button bars

- The styles available on the styles button bars vary with the type of document you are creating.
- Each item level button bar has a button for heading style (H) and a text button (T); other buttons are available dependant on the document type.
- The name of the style will appear if the mouse pointer is moved over the button.
- You can hide any styles button bars you are not using by clicking again on the appropriate coloured STYLE button (left end of CDocS toolbar).

Instructions for applying styles are given (below) in SECTION 2.2 Adding content to the skeletal document.
2.2 Adding content to the skeletal document

2.2.1 adding new text in the appropriate style
1. Position the cursor where the new text is to be inserted.
2. Select the appropriate style name from the button bar. *tip* - the appropriate style name is displayed in the style bar alongside similar items.
3. Type in the new text.
4. The new style is displayed in the style bar to the left of the new text.

2.2.2 changing the style
1. Place cursor in the text to be altered.
2. Select the appropriate style name from the button bar. *tip* - the appropriate style name is displayed in the style bar alongside like items.
3. The new style is displayed in the styles bar to the left of the entry.

2.2.3 changing the level of an item
The Wizard facilitates easy allocation of items into main and sub items. To change the level of an item after the wizard stage of document creation has been completed:
1. Place cursor in the item heading.
2. Select the appropriate style name button.
3. Repeat as required for other elements.

*For example:*
To convert a main item into a sub-item:
   a) place cursor in the item heading.
   b) choose the H button ItemHead2 on the level 2 (yellow) toolbar.
If there is text with this item:
   a) place cursor in the text.
   b) Choose the T button ItemText2 on the level 2 (yellow) button bar.
If there is a bulleted list with this item:
   a) select the list.
   b) Choose the • button BullList2 on the level 2 (yellow) button bar.
And so on until all elements in the sub-item have been re-styled.

2.2.4 adding another item
To add another item to the document after the wizard stage of document creation has been completed:
1. Position the insertion point where the new item is to be inserted (use return key to create and empty line).

2. Select the appropriate style name from the Style button bar - the appropriate style name is displayed in the style bar alongside other items at the same level.

3. Type in the item heading.

4. If you need to enter text with this item, press RETURN. The appropriate text style and insertion point will be generated.

5. Type in the item text.

2.2.5 cut-&-paste from external documents

Ideally, documents should be created using the Committee Wizard, but some minutes may originate from elsewhere. You can “cut-and-paste” part or all of these documents into an empty document you have created using the wizard. By this process, however, you will import unwanted styles from the source document. To remedy this either:

- Re-style the text once it has been imported into your document so that there are no styles in the style bar (left hand side of screen) which are not CDocS Styles. or

- Cut-and-paste text only, avoiding any paragraph marks (¶). Re-style as appropriate. or

- (For pasting in larger chunks of text) use EDIT, PASTE SPECIAL then choose UNFORMATTED TEXT. Re-style as appropriate.

2.2.6 auto-numbering

Beware of Word 97’s auto-numbering!

A numbering problem already existed in previous versions of Word. The user can manually ‘fiddle’ the numbering (such as to skip a paragraph) and the document appears okay, but this is insecure, because Word may reinsert the number ‘behind the user’s back’ later. At any rate, if you ‘fiddle’ numbering in a CDocS document, all onward versions (such as the web version) will ignore the ‘fiddle’ and re-assert the strict numbering.

The numbering problem is further exacerbated by a new feature of in Word 97, allowing a numbered list to run on after a break (an unnumbered paragraph). This is not one of Microsoft’s better thought out feature; it works well enough in a simple document, but produces a number of odd effects if you start to edit a numbered list. And remember, Word cannot export this feature either, so in all onward versions of your document the numbering will recommence at 1 after any break.

It is rumoured that Microsoft have successfully tackled this problem in the Word 2000

We suggest: Whenever you break a list, you recommence the numbering at 1 in the Word document, as this is how it will appear in all other versions.

It is extremely easy to get uneven indentation or non-sequential numbering in Word 8 numbered lists. Should this happen follow instruction below to renumber from 1

To re-number from 1

1. Highlight the list onwards from the point where re-number should start.

2. Click again on the number style button.

3. The highlight portion of the list should start from 1 (or a)
2.2.7 adding emphasis!

Should it be necessary to add additional formatting on top of that provided by the Styles to add emphasis:

1. Highlight the text
2. Choose Emph from the Styles drop-down box.

Note: Text formatted with the Word formatting options (e.g. using the bold and italics buttons on the standard toolbar) may loose this formatting when the document is converted. At present, bold is converted: italic is not.

2.2.8 tables

Tables can be incorporated into minute and summary report documents.

Create the table as usual using the TABLE menu in WORD. You may also import tables that have been created in a spreadsheet such as Excel - but do not rely on the complex formatting available in a spreadsheet package being conserved in all possible versions of your document.

If the data is already available on the www, consider linking to the original table rather than duplicating it.

Tables display numerical information such as financial data: but are also increasingly used to set out text in columns, such as a list of personal names and associated roles. When using tables, be aware that some on-line versions will, and some will not, have borders applied. Borders are controlled by the settings on individual browsers and are outwith your or our control.

We suggest:

- when presenting numerical data avoid leaving large areas of empty cells (which make the rows and columns difficult to follow on browsers displaying the data without borders)
- when presenting non-numerical data consider other style options. For example a two-column list could be styled as a definition list
- if possible avoid using tabs; their size and placement are specific to your PC!

Preparing the Table

- Your tables should have a caption (i.e. a heading).
- Are there formulae in the table? For example, automatically summing rows or columns. If so, turn them off! (If in doubt, assume there are, and follow procedure below.)

To turn off all the formulae in a table

i. Place cursor anywhere inside the table.
ii. From the TABLE menu, choose SELECT TABLE.

Note: If a formula is removed, the content of the cell becomes regular text. If you later want to update the information, you must insert the formula again.
Styling your Table

1. Select the caption style at the level you are working. SectCap(n) - the button marked C at the appropriate level.

2. Type in a caption for the table (in WORD this style is bold and centre justified)

3. Select the table:
   • Place cursor anywhere inside the table.
   • From the TABLE menu, choose SELECT TABLE.

4. Apply table style SectTable(n) - the button marked T at the appropriate level.

You can now add formatting, such as applying bold to totals, and centre or right justifying the contents of cells. Do not rely on this additional formatting however, it will not be conserved in all possible versions of your document.
2.3 Style choice

The styles available vary with the type of document. The choice of style for each piece of text needs to be appropriate to what the text actually is (a heading, a list item, a recommendation etc).

Each area of text in the document should be styled using the appropriate CDocS style. Styles are used to confer structure on the document. The naming of styles helps to guide user choice. For example: Text inserted after a heading styled ItemHead1 should be styled ItemText1 while a bullet list at this level should be styled BullList1.

It is important to use the CDocS styles and not to create a superficially similar affect by other formatting techniques, e.g.: by using italic button and tabs. Such formatting does not contribute to the structure of the document and is lost when the document is converted for presentation other than in Word.

Some styles may apply similar presentation, but are different. For example, ItemAction1, ItemAction2, & ItemAction2a all have the same appearance in the document (bold, right justified etc.) but belong to items at different levels. Remember to use the style bar on the left of the page for guidance. The names of the styles are shown on the top line of each paragraph/element.

2.3.1 what is an item?

Agenda, minutes and summary report documents can each be viewed as a set of items. Agenda often comprise no more than a set of item headings, while minutes and summary reports include after each heading some text summing up the discussion at the meeting.

2.3.2 choosing an item level (red, yellow etc)

Each item level has a colour-coded style bar.

At what level is an item? All items begin at level 1. If the item can be divided into parts these parts are sub-items and will be at level 2 or possibly 1a (level 1a is for the pedants: if in doubt use level 2). Level 2a is available if you need to further subdivide level 2 items. The body of the document will contain item headings entered by the wizard awaiting the addition of the document content. These should already be correctly styled at the appropriate item level. Add content to the item at the same level as the heading. The choice of item level is not difficult but it is hard to explain: the specimen items levels document in APPENDIX III demonstrates the principle.

Once you have decided on a level for an item, pick all the styles from the same (coloured) toolbar. To turn on or off a style level toolbar click on the appropriate numbered (and coloured) button on the CDocS toolbar. The item will use styles from that toolbar. If there are sub-items, they will be at the level below.

For example: Under a main heading at ItemHead1 (red button bar)

- An ordinary paragraph of text will be styled ItemText1 (red button bar)
- A bulleted list will be styled BulList1 (red button bar)
- A numbered list will be styled NumList1 (red button bar)

And a sub-item will start with a Heading styled ItemHead2 (yellow button bar) and contain text styled ItemText2 (yellow button bar) etc..
2.3.3 choosing a style to match content

Once you have decided on the level open the button bar and choose a style appropriate to the content, i.e. what you are typing! If it is a list use a list style; if it is not a heading do not use a heading style!

If there are sub-parts within an item, you will have to choose whether to make them sub-items or just entries in a list. Guidance: if the sub-part has a heading, or if it is more than one paragraph long, make it a sub-item. If it is styled as a sub-item, you must give it a heading! Sub-items use level 2 styles (yellow) and begin with a (level 2) heading.

Avoid using heading styles as a method of emphasising text. If it isn’t a heading don’t use a heading style; it will look absurd when automatically included in a table of contents or index. But if an element is a heading do choose a heading style.

Most people use only a subset of the available styles dependant on how they prefer to set out their document. For this reason a number of styles and levels are provided which you may not require. The style bars for levels not in use can be switched off (or never switched on) to avoid cluttering up your desktop. For example, many people never use levels 1a and 2a so the 1a and 2a toolbars do not need to be on view. To turn on or off a style level toolbar click on the same coloured button on the CDocS toolbar.

2.3.4 styles in the agenda

Because agendas are simple documents you may have no content to add after the wizard stage of creation is complete. However, if you need to add more content two item levels are provided for: main items are designated at level 1 (red), and sub-items are at level 2 (yellow).

The styles available are those relevant to agenda. To see the available styles click on the red and yellow style buttons at the end of the CDocS toolbar. The level 1 (red) and level 2 (yellow) button bars will be displayed alongside the document. Hold the mouse over a button to see the full style name.

agenda button bar

```
<table>
<thead>
<tr>
<th></th>
<th>heading</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>text</td>
</tr>
<tr>
<td></td>
<td>alpha list</td>
</tr>
<tr>
<td></td>
<td>bullet list</td>
</tr>
<tr>
<td></td>
<td>numerical list</td>
</tr>
</tbody>
</table>
```

Each level has a set of 5 styles available: heading, text, and three list types, alpha (a,b,c..), bullet and numerical (1.2.3..).

What the styles are for..

heading

The wizard enters the item list entries as headings. If you need to add another item IN AN AGENDA, it is probably easiest to run the agenda wizard again. The item list will be stored as you left it can easily be altered. If you do decide to add an item in the document, number it correctly and to update the numbering for all following items.
text
Use for all text that is not a heading, nor a list item!

lists

Should an element be a list or a sub-item?

Use list styles for a set of short points. If there is more than one paragraph per list item, enter as sub-items at the level below. You will not be able to use list styles to format multi-paragraph items because each paragraph will be automatically numbered, and there is no point in removing the numbering from the Word version of the document as it will reappear in other versions.

alpha list
An element in an alphabetically labelled list (a,b,c, etc).

bullet list
An element in a bullet labelled list.

numerical list
An element in a numerically labelled list (1,2,3, etc).

To style content, place the cursor in the document where the content is to be inserted, and select a style by clicking on a style button.

- For explanation of levels and choice of styles see SECTION 2.3 What styles to use where
- For an example of style usage, see the specimen agenda in APPENDIX III.

2.3.5 styling the minutes

You will have content to add to the minutes document. Two item levels are provided for: main items, designated at level 1 (red), and sub-items, at level 2 (yellow). There are 2 further levels 1a (aqua) and 2a(pink) which allow increased flexibility and can be used inside 1 and 2 respectively (but note: 1a is instead of 2, you cannot nest 2 within 1a).

The styles available at each level are those relevant to minutes. To see the available styles click on the red and yellow style buttons at the end of the CDocS toolbar. The level 1 (red) and level 2 (yellow) button bars will be displayed alongside the document. Hold the mouse over a button to see the full style name.
Each level has a set of 8 styles available: heading, text, action, disposal, three list types - alpha (a,b,c..), bullet and numerical (1.2.3..) - and a bulleted sub-list which extends any of the three list types (try them out)

To style content, place the cursor in the document where the content is to be inserted, and select a style by clicking on a style button.

- For explanation of levels and choice of styles, see SECTION 2.3 *What styles to use where*
- For an example of style usage, see the specimen minutes in APPENDIX III.

### 2.3.6 summary report styles

You will have content to add to the report document after the wizard stage of creation is complete. Two item levels are provided for: main items, designated at level 1 (red), and sub-items, at level 2 (yellow). There are 2 further levels, 1a and 2a, that allow increased flexibility. Bodytext level (white) is used if there are no sub-parts in the document: use this level for text elements not covered by any interior heading.

The styles available at each level are those relevant to a summary report. To see the available styles click on the red and yellow style buttons at the end of the CDocS toolbar. The level 1 (red) and level 2 (yellow) style bars will be displayed alongside the document. Hold the mouse over a button to see the full style name.

#### summary report button bar

- heading
- text
- recommendation
- alpha list
- bullet list
- numerical list
- bulleted sub-list

Each level has a set of 7 styles available: heading, text, recommendation, three list types - alpha (a,b,c..), bullet and numerical (1.2.3..) - and a bulleted sub-list which extends any of the three list types (try them out)

To style content, place the cursor in the document where the content is to be inserted, and select a style by clicking on a style button.

- For explanation of levels and choice of style see SECTION 2.3 *What styles to use where*
- For an example of style usage see the specimen summary report in APPENDIX III. Summary reports also contain a bodytext level and styles in each level for recommendations and sub-lists.
SECTION 3 CONVERSIONS AND UPLOADING TO THE WEB

Section 3 provides instructions for validating the document for conversion, for adding links to the document, for converting the document into other formats, and uploading a web-viewable version of the document onto the University web site.

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3.1. Adding Links

Many items will have papers associated with them. If the committee papers are being distributed on-line, you will need links to all the papers of the meeting from the agenda, and as appropriate from the minutes and summary report.

If the item heading is the name of the report or paper, it is effective to use the heading itself as the anchor text for the link, and this is the form of the links added by the wizard. However, if there is more than one paper, or the paper considers only one aspect of the item, it is better to refer to it in the text, and link from that reference. The connection between the anchor text and the paper needs to be obvious; the reader should not be surprised by the paper!

Items linked from the agenda will automatically carry forward the link to the minutes and report. Items carried forward from previous meetings may also have links in place. Don’t forget to check that standing item links are up to date (e.g. the regular Report from the Working Group may link to last term’s report).

The first item, minutes of the last meeting, will have an automatically generated link to the previous minutes.

To create a link to an on-line document you need to know either:

- the URL (External document).  *or*
- the filename (and the date of the meeting to which the document was submitted if not this meeting)

3.1.1 finding the filename or URL

The person responsible for an item referencing an existing on-line document outwith the CDocS system (such as the governments Freedom of Information Act pages) should provide you with the full URL.

As you receive the committee papers, make a note of the filenames and the items to which they belong. If you have yet to receive a paper when the agenda goes up you may not know the filename; if you are not able to get the filename from the author you can amend the agenda to include this link once the paper has arrived.

If the paper has not arrived yet and if you are going to upload the paper you can make up a filename yourself (keep it short, no punctuation or spaces). There may be a naming convention you can follow (e.g. that the annual report is always called annualrept). If you make up the name *keep a note of it, and remember to call the paper by this name when it arrives!* The link will lead to nowhere until the paper is on-line, so expect to hear from committee members pointing out that the link isn’t working.

For papers already on-line you can check the filename, or find the URL, by opening the paper in a browser and reading the URL from the location box. The filename is shown at the end of the URL. For example:
3.1.2 adding a link:

1. Highlight the text that you wish to be the anchor text. This will usually be the item heading text. Ideally it should match the name of the Paper (e.g. Report from the Computing Service) making the connection between the agenda item and the paper clear to readers.

2. Click the Create Link button on the CDocS toolbar. This calls up the link dialogue boxes. The Create Link dialogue boxes consist of a number of fields for you to fill in. All the fields pertain to the document to which you are linking: your entries are used to construct the address of this target document.

   **link dialogue box 1: External/Internal**
   - If you are linking to a paper submitted to this committee or to another committee using CDocS, then the target document is internal - click YES (you will need the filename)
   - Otherwise click NO (you will need the URL)
   - If you are in doubt and have the URL of document, click NO

3.1.1.1 external Documents

If a document does not belong directly to a committee using the CDocS, you need to know the URL of the document.

   **item link dialogue box 2: External Target Document**
   1. Enter the full URL of the target document
      
      Be careful to get the URL exactly right - there are no spaces within a URL, and no ‘dot’ on the end. Include the **transfer protocol** for the document (http or ftp for example - if in doubt, try http) **tip** Use COPY-AND-PASTE to transfer URLs to avoids typing errors.
3.1.1.2 internal documents

Internal documents are those of committees within the CDocS system.

The fields of the dialogue boxes are used to create an ‘address’ for the target document. Remember, all questions pertain to the document to which you are linking. **Links will not work unless the information given in the link is correct!** (As with a telephone number nearly right doesn’t count).

**item link dialogue box: Internal Target Document**

1. Select the committee that **generated** the document. The committee you are creating your document for, unless the target document has been submitted to a previous meeting.

2. Select a document type. For incoming papers, choose **Paper** option. **Report** refers only to the summary reports exchanged between committees. If you are creating a cross-reference to the item in the minutes from a previous meeting, choose **Minutes**.

3. Enter the date in the form YYYYMMDD. The date of the meeting for which you are creating the document, unless the paper was previously submitted to a different committee or meeting, in which case enter the date of that meeting.
Section 3  Conversions and Uploading to the Web

On this page: 3.1. Adding Links

4. Enter the filename of the target document. The filename may be in the form YYYYMMDD (date) in the case of minutes or agendas, or a string such as budget. It must be correctly typed, and with no spaces. Even if you think you know the file extension (.doc .htm .rtf), leave it out.

5. Optional. Leave this field blank unless you wish to link to a section within the target document. If you are creating a cross reference to an item in a previous minutes, enter the previous minutes item number. Enter the full number e.g. ISC/1999/23.5

6. OKAY. The link is created.

Your link text will be entered into the document, and the anchor text will have been re-styled. The pathway is in hidden text style and the anchor text should be blue. When the document is converted to HTML the pathway and anchor text will be converted to form a link. **If you change this text, you may disrupt the link.**

**fudge:**
If you get lost trying to create an internal link, any document can be treated as an external document provided you know the URL; if you can find the document on the web you can read the URL from the locations box at the top of the browser window.
Section 3  Conversions and Uploading to the Web

On this page: 3.2  Check Styles Routine

3.2  Check Styles Routine

A check styles routine has been incorporated into Committee Document System. Once the document is completed use the check styles tool to run a simple validation confirming that the choice of styles conforms to the specifications of the document type (and is therefore compatible with the automatic conversion process). If the styles are compatible with the template specification, the tool highlights the different item levels within the document to allow the creator an at-a-glance-view of the document structure so that any miss-allocations can be rectified. If the document styles are not valid, the automated conversion process will not work.

User Checklist: Before running the validation tool, make a quick check of the document. Remove empty paragraphs (3.2.1) and change non-committee styles (3.2.2)

3.2.1 remove empty paragraphs

Make sure there are no empty paragraphs in the document.

If a paragraph mark is sitting on a line on its own it should be removed. Highlight the paragraph mark and hit the delete key.

- Paragraph marks may not always be visible. To see any trailing paragraph marks (¶) turn on the SHOW/HIDE button on the standard toolbar

3.2.2 remove non-Committee Document System styles

Only CDocS styles should be used in your document. Styles imported into your document by mistake should be replaced with the appropriate CDocS style. Place the cursor in the incorrectly styled text and select a style from the button bar.

3.2.3 running the check styles tool

1. Use the CHECKSTYLES button on the Committee Document System toolbar to launch the validation.

2. Any structural errors within the document bring up an error box stating the problem and the offending section in the text is highlit. Alter the paragraph style (see Section 2.2 for assistance) and press CHECKSTYLES button again.

3. Repeat until the style checker reaches the end of the document. The STYLES VALID message box will appear. Okay this box.

4. Once the style checker has validated the document, blocks of highlighter are used to show the changes of level. At this point, the creator can see at a glance the layout of the different levels. Any unexpected colour change indicates a level change that needs to be checked.
   - red for level 1 elements
   - blue for level 1a elements
   - yellow for level 2 elements
   - pink for level 2a elements

5. Use the SwitchColourOff button to turn off the highlighting!

6. The check styles routine should be re-run when changes are made to the document.
3.3 Conversion to RTF

Your document must be converted to rtf before it can be upload it to the university web-site. This conversion will not work unless your document is correctly styled, use the check styles validation (SECTION 3.2) to confirm this. Then:

1. Save the Word document using the SAVE DOC button on the CDocS toolbar. Save this latest version in the same filename and directory as before.
2. Click the SAVE RTF button on the cmmittee toolbar.
3. The SAVEAS dialogue box appears. Click SAVE button (without changing the filename or destination directory).

The SAVE RTF process produces three new files that will appear in the same directory as the Word file (the original version). These files will have the same filename but different extensions:

[filename].doc (the original word file)
[filename].bat
[filename].r2h
[filename].rtf

Your computer may or may not be set to display file extensions - Windows Explorer will however show the four files of the same name:
You will upload two of these new files: [filename].r2h & [filename].rtf to display your document online. See SECTION 3.4 Uploading to the University web site.

If the SaveRTF button produces an error message?

- Have you saved the Word document? If not, SaveRTF will not work. Use the SAVEDOC button to save the document first.
- Is the error message a style error? Use the CheckStyles tool (SECTION 3.1) to validate your document before you use SAVERTF.
3.4 Uploading to the University Web Site

To upload a document you will use a browser such as Netscape or Internet Explorer. You need to know the filename of the document and where it is located in your files (which directory). You also need to know the date of the meeting the document is to be submitted to.

You will need to upload two files for each on-line document: [filename].rtf & [filename].r2h. If you have not already created these files, see SECTION 3.3 for instructions.

Be aware that, while page downloads and emails usually take only seconds, download time may increase if the server is busy or sulking.

This section contains full and detailed instructions for uploading your documents to the web. If you have used the system before and require only a reminder, there is a Quick Guide to Uploading at the end of the section.

3.4.1 uploading the document

1. Open an Internet browser (e.g. Netscape or Internet Explorer)
2. In the locations box enter the URL: http://www.gla.ac.uk/staff/erm and press RETURN. A login box appears.
3. Enter you username and password. Wait for the Document conversion page to download
4. At the ERM Document Conversion Page click on the link: Transfer document to the web server

A blue Transfer of Documents form appears on the page:
5. Click the upper BROWSE button. The FILE UPLOAD dialogue box appears.

6. Within the FILE UPLOAD dialogue box use the FILE LOCATION drop down list to locate the directory where you have the document files:
Section 3  Conversions and Uploading to the Web

On this page: 3.4 Uploading to the University Web Site

7. Change the selection in the **Files of Type** box to All Files (Annoyingly, on most browsers this defaults to show HTML files so you will have to redo this each time you use the File upload):

8. For the first document selection field (the upper browse button) Select `[filename].r2h`.

9. Click Open. The path to this file is entered into the top **Document Selection Field** in the browser window.

10. Repeat steps 4 - 8 for the second **Document Selection Field** using the lower browse button, and selecting `[filename].rtf`
11. Select the appropriate committee name from the COMMITTEE NAMES drop-down list. When uploading a Summary Report, choose the receiving committee.
Section 3 Conversions and Uploading to the Web

On this page: 3.4 Uploading to the University Web Site

12. Select the correct document type from the DOCUMENT TYPE drop-down list.

13. Type the date of the meeting in the form YYYYMMDD into the meeting date field.

14. Click SUBMIT DOCUMENT button. Wait for response.
3.4.2 successful upload

If your upload is successful, you will see the following screen. Your document is appended to the bottom of the screen. Use the down arrow on the scroll bar to view your document.

Check it!!- Is this the right document? It is easy to upload one with a similar filename by mistake.
You will receive an automatically generated email message (from nobody). This usually arrives in a few seconds but will take longer if the server is busy. The email message has the test area and installation URLs for this document embedded in it.

From: nobody@udcf.gla.ac.uk
Date sent: Mon, 17 Jan 2000 15:45:52 GMT
To: j.lee@archives.gla.ac.uk
Subject: Document Transfer

Dear Jane,

On 17 January 2000 at 15:45 you requested that the documents
C:\jane\committees\uc/19991022/agenda/19991022.r2h
C:\jane\committees\uc/19991022/agenda/19991022.rtf
be converted and placed on the University Web Server.

If you were not the originator of this request,
then please report the matter to mailto:erm@archives.gla.ac.uk

You may check the output of the conversion process by visiting the url:
http://www.gla.ac.uk/doctoweb/I25191/out/19991022.htm

If you wish to proceed to make this document available to the University,
please visit the installation url
http://www.gla.ac.uk/cgi-bin/erm/install.pl/6mz82Ssg6H++8NbtPj

Thank you for using this facility,
The Document Management Team.

1. To check your output, double click on the TEST AREA URL (in the email message). Your document will be displayed in a browser window.

2. Check the appearance of the document carefully: this is exactly how it will look on-line. But don't worry about the links: some will, and some will not work from the test area.

3. If you notice a problem,
   - Go back to the original .doc version in Word
   - Make your corrections.
   - Save changes
   - Reconvert the document to form new .rtf and .r2h files.
   - Up-load the altered files.

4. Once you are happy with your document click twice on the INSTALLATION URL (in the email message).
Your document is now displayed on the university web site. You can reach it via the link on this ‘Publish Document and Index’ page or by the bookmarks you usually use to access the committee documents. The document URL is given (you may wish to forward this to committee members for their convenience, but you do not need to except for draft minutes. All the other document types can be reached through the committee pages index).

Making changes to the document

If in you have to alter a document already on the web site:

- make your alterations in the original Word version (.doc)
- check the styles are still valid (Checkstyles)
- save (SaveDoc)
- reconvert (SaveRTF)
- upload again. The new version will automatically overwrite the old files (of the same name) on the web site.
- check the document again, including the links.
3.4.3 unsuccessful upload

If the upload fails...

1. Read the screen information. It may suggest an error entering the document details.

2. Repeat the upload procedure (Use the TRY AGAIN link to get back to the upload form.)

3. Contact erm@archives.gla.ac.uk for assistance.

3.4.4 checking your document

Once the document is on-line, all the links should work. You will need to check each link, including the internal links (i.e. that the index jumps the reader to the right section of the document). Check the links systematically, using the browser’s BACK button to return to return to the document.

If a link doesn’t work...

- check that the target document really exists and is available on-line
- check you have spelt the name of the document correctly
- hold the mouse over the non-working link in your document - the URL it is pointing to is displayed in the status bar (bottom left of the browser window)
- find the target document on-line, see how the URL of the document (shown in the locations box when the document is displayed) differs from the URL in your link.

If all else fails contact the erm team erm@archives.gla.ac.uk
3.4.5 quick guide to uploading to the university web site

1. Open a browser e.g. Netscape or Internet Explorer
2. Go to http://www.gla.ac.uk/staff/erm
3. Enter username and password
4. Link transfer document to Web
5. In the blue transfer of documents form:
   1. In the upper document selection field select the [filename].r2h
   2. In the lower document selection field select the [filename].rtf
   3. Select the committee name
   4. Select the document type
   5. Type in the meeting date

Submit Document

- This may take a few minutes...

read error message

No

- Unable to find the r2h & rtf files?

Yes

- Open document in word. Use SaveRTF button (Section 3.3). Note the directory you are saving to

Have you saved the document as an rtf (rich text format) file?

No

- No

Open a browser e.g. Netscape or Internet Explorer

Open document in word.

Unable to find the r2h & rtf files?

May take a few minutes to arrive...

(Do you have your email on?)

Submit document to university web site by 2xclick on confirm upload URL

- Check!
  - the on-line document looks okay
  - all the links work

For detailed instructions see Section 3.4.1 Uploading to the university web site
3.5 Approving the Minutes On-line

Minutes are initially displayed as draft and are approved on-line between meetings. Draft minutes are not linked from the minutes index page.

Once the draft minutes are on-line,

1. Inform the membership by email
   - Saying where the draft minutes are displayed (include the URL in the message)
   - Requesting any amendments before a fixed date (allow around 10 days).
   - And requesting that suggestions for amendments be sent by email using the committee distribution list; this enables all members to see and comment on proposed amendments.

2. Once the date for amendments is passed alter the original Word (.doc) version of the minutes to
   - Make any amendments as agreed with the convener.
   - Remove the word ‘DRAFT’ (top left) and insert ‘APPROVED’ in its place.

3. After making the changes, resave the document
   - Using SaveDoc
   - Using SaveRTF

4. Upload the approved minutes document files (SECTION 3.4). Choose APPROVED MINUTES in the document type box when uploading. This triggers the automatic inclusion of a link to the minutes from the minutes index page.

5. View on-line in browser. Use reload button to see the new version

6. Check
   - the approved minutes, include checking all links
   - the link from the minutes index page (present and working).
SECTION 4 MANAGING THE COMMITTEE DOCUMENT SYSTEM

Section 4 is concerned with the management of the system, rather than the creation or dissemination of documents.

Section 4.1 shows the CDocS file structure. This is provided for you information, in case you wish to modify the installation of the system on your PC.

Sections 4.2 & 3 describe the use of the ERM committee management facility. Section 4.2 contains installation instructions. Section 4.3 sets out how to add new committees, and edit existing committees. It is good practice, and saves time, to update the membership list rather than amend it in your documents.

The final sections are concerned with problem fixes. Section 4.4 explains how to produce your own person names list to hook onto the personal name facility, as an interim measure until an authoritative university-wide list is available. And Section 4.5 provides a fix for documents that have come loose from their templates.

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4.1 Committee Document System File Structure

This diagram shows the arrangement of the CDocS system files and is for you information only - the installation process is automated! The cmmttee directory contains five other directories. If these directories need to be located on different drives (See next section.), it may be helpful to mark the drive letter on the diagram.
4.2. Installing CDocS

The installation process is automated, however you will have to decide where to place the files within your environment. This requires some understanding of directory structure, and knowledge about the set-up of your PC and local drives. These instructions should provide all the information that you or your systems administrator need to install the system. If you need help, contact the ERM team for assistance.

4.2.1. launching the ERM installation facility

To install CDocS, double-click on the ERM icon (inside the cmmttee directory). Note: The installation screens only appear the first time the ERM facility is launched; once the system is installed, the ERM icon leads directly into the committee management screens.

You will be asked to provide a location for the cmmttee directory. You can place it on your C or H drive or on a shared drive.

The cmmttee directory\(^i\) contains five other directories; authfile, local, controls, templates and styles. The simplest installation would be to finish at this point, leaving all these directories inside the cmmttee directory, However...

- Read only drives are the best locations for control, styles and template directories preventing their files from being accidentally overwritten.
- The local and authfile directories must be placed on a drive with write access.
- A shared drive(s), to which each user has access, will be necessary if
  - the agenda and minutes are created by different people,
  - creating the agenda or minutes involves more than one person,
  - different people create the agenda and minutes for different meetings of the same committee,

---

\(^i\) erm@archives.gla.ac.uk
\(^\text{ii}\) the terms ‘directory’ and ‘folder’ are use synonymously
Furthermore, you can only leave the templates directory inside the cmmttee directory if your Word set-up has a spare pointer with which to locate it. See Section 4.2.2. Templates

Moving the template directory out of the directory will not effect CDocS. However removing any of the other directories will require pathways to be reset (contact ERM team\(^1\) for assistance).

4.2.2. Templates

The CDocS templates have to be located by Word. Word looks in two locations for templates; both locations can be re-set by changing the location pointers. The USER TEMPLATES pointer locates Word's default templates, usually on a local drive, the WORKGROUP TEMPLATES pointer may be free, or in use, perhaps to point to shared templates (such as departmental letterheads) on a shared drive

- If you have a free pointer, put the ERM templates wherever you choose and change the WORKGROUP TEMPLATES location to point to them.
- If both pointers are in use, place the ERM templates directory in the WORKGROUP TEMPLATES location already specified, alongside the existing templates. (Moving the template directory out of the cmmttee directory will not effect CDocS.)

4.2.2.1. Template pointers

<table>
<thead>
<tr>
<th>to view your current pointer locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Open Word.</td>
</tr>
<tr>
<td>2. From the TOOLS menu, select OPTIONS...</td>
</tr>
<tr>
<td>3. Click the FILE LOCATIONS tab. The pathways for all the file locations in use by Word are listed.</td>
</tr>
<tr>
<td>4. The location pointer entries are labelled WORKGROUP TEMPLATES and USER TEMPLATES</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>to change the pointer to point to the CDocS templates (Follow 1-3 above. Then...)</th>
</tr>
</thead>
<tbody>
<tr>
<td>5. Select WORKGROUP TEMPLATES and click MODIFY button</td>
</tr>
<tr>
<td>6. Use the MODIFY LOCATION dialogue box to locate the templates directory wherever you have installed it ([pathway]/cmmttee/templates).</td>
</tr>
<tr>
<td>7. (In the dialogue box) Open the templates directory but not the ERM directory within it.</td>
</tr>
<tr>
<td>8. Okay.</td>
</tr>
</tbody>
</table>

Look at the pathways for USER TEMPLATES and for WORKGROUP TEMPLATES (1-3 above)

The path to USER TEMPLATES is probably .../Microsoft Office/Template (Word's default template directory; don't change this pointer or you will lose your connection to the normal document template. (Occasionally, the WORKGROUP TEMPLATE pointer may point to the default templates, and the USER TEMPLATES to a departmental directory.)

\(^1\)erm@archives.gla.ac.uk
The path to WORKGROUP TEMPLATES may be blank, or pointing to another directory. If the path is blank, you have a spare pointer and you can use it freely. If a directory path has been set, you must decide whether you use the templates in this directory. Your system administrator or IT staff will know whether this is a departmental shared templates directory. Should you decide you do not use these templates, you can go ahead and change the pointer (but perhaps make a note of the path, in case something you were fond of suddenly disappears from your life). If the second template location is in use, make a note of the location and put the CDocS template directory inside this directory.

4.3. Managing the Committee List

The ERM committee management facility enables you to add new committees to the CDocS system, and to edit existing committee information.

Committee membership lists

The Committee members list form allows you to create a member’s list for a new committee, or to add, edit and delete entries on an existing committee membership list.

This is the best way to keep membership lists up-to-date, saving time and effort when the attendance lists are created in the minutes document. Adding names to the attendance list inside the minutes document is tedious and exacting because name entries are highly formatted. Names formatted incorrectly will display the wrong elements, and can disappear completely, in onward versions of the document. It is much easier to put everyone in the membership list and let the wizard do the work for you.

4.3.1. Launching the ERM Committee Management Facility

1. (Using Windows Explorer) Find the CMMTEE directory.
2. Open the CMMTEE directory. You should see the ERM icon; if not, check for another cmmttee directory on another drive.
3. Double-click the ERM icon to launch the committee management facility.
4. The committee management system launches Word, and displays a series of dialogue boxes. You will work inside the dialogue boxes until you leave this facility.

**entry dialogue box: welcome to the ERM**

1. Three options are presented in the Entry dialogue box. Use the radio buttons to select an option. See
   - SECTION 4.3.1. Adding a new committee
   - SECTION 4.3.2. Editing an existing committee
   - SECTION 4.3.3. Deleting a committee

2. Click the FINISH button to leave the committee management system.

4.3.2. Adding a New Committee to the Committee List

You will need to know,

- committee name
- committee code (e.g. the Information Services Committee code is ISC)
- convener name
- clerk name
- clerk email
- up-to-date membership list
4.3.2.1. adding the committee details

**ERM Add committee dialogue box**

1. Enter the name of the new committee
2. Enter a committee code (ideally, the code should be unique to this committee, but as short as possible because it will appear in the item numbers)

4.3.2.2 creating the committee members list

When you create a new committee you will be asked if you wish to add a members list. You can create this list later if you prefer, and amend and update it at any time, using the EDIT AN EXISTING COMMITTEE facility.

If you decide to add a members list, you will be confronted with the members list dialogue box.
Add committee members dialogue box

The membership list can contain these elements:

- [title]  [initials]  [surname]  [department or office]  [email]

Dr  J C  Currall  Convener*  j.currall@compserv.gla.ac.uk

You must supply a surname for each member, but the other fields are optional.

*Use the department field to present the office of the member, if this is more pertinent (such as convener, committee clerk, or vice-principal).

This list is used to construct the "present", and "apologies", lists the minutes.

1. Type the first entry into the fields (you must enter a surname; other fields are optional)
2. Click ADD button.
3. Repeat for each member
4.3.3. editing an existing committee

4.3.3.1. altering the committee details

This facility enables you to update the members list as often as is necessary. You may also use it to change the committee name, but not the committee code.

Changes to the committee name should reflect an official decision, as they may cause confusion and make it difficult to trace back through the committee process. The committee code should be unique to this committee. Changing the code of an established committee has serious records management implications, (and will prevent the upload of committee papers to the university web) therefore, this option is not offered. If you wish to change the code of a committee that is already on-line, contact the ERM team for advice.

4.3.3.2. updating the committee members list

Use this dialogue box to manage the committee members list. Add new members, delete, or amend details of existing members, as appropriate.

1. In the Edit committee dialogue box, choose EDIT MEMBERS LIST. The Edit committee members list dialogue box takes a few moments to appear, and you will notice the members list open as a Word document behind the dialogue box. This is normal (although admittedly not ideal), you cannot access the list directly and must work via the dialogue box.
Section 4 Managing the Committee Document System

On this page: 4.3. Managing the Committee List

2. The Edit committee members list dialogue box opens. The current members list is shown in the lower half of the dialogue box. Use the scroll bar to scroll through the list if an entry you wish to edit is not on view.

3. To add a new member
   a) Type details into the fields (see SECTION 2.3.1.2. Creating the committee members list
   b) Click ADD.

2. To edit member details
   a) Select entry to be edited
   b) Click EDIT. The selected entry jumps into the text boxes. Edit as required.
   c) Click REPLACE.

3. To delete a member
   a) Select entry to be deleted.
   b) Click DELETE.

4. Continue to edit until list is up-to-date

5. Click FINISH
4.3.4. deleting a committee

Use this option warily, it is easy to delete a committee along with its details. You cannot loose any committee papers you are storing, but you would loose the membership list and committee detail files.

Delete committee dialogue box

1. Select committee from current committee list.
2. Click DELETE. (Note: you cannot cancel this afterwards, to restore a deleted a committee)
3. Click Finish to leave this box.

If you accidentally delete a committee from the committee list

The committee files still exist! Do not attempt a rescue by using the ADD A COMMITTEE option, as this will overwrite the existing files (such as the members list) with new blank ones. Contact the ERM team for assistance.
**4.4 Updating the Personal Names List**

A Personal name list is provided which is accessed from the EnterPersName button on the CDocS toolbar; this function enters fully formatted and styled names into the document. Ideally, this would be connected to a centrally held Personal names list, that provided a comprehensive list of staff names in standardised formatting. When such an authoritative database of staff names becomes available, the system will connect directly to it. In the meantime, a flat file of names is stored for each user.

*Note:* At present this list must be edited manually; this is fiddly, and tedious, and requires care.

Names are in the form:

[Surname],[Title],[Initial(s)],[Action Initials],[Dept or Office],[email address],[Unique ID no.]

1. Open the file <path to file> cmmittee/controls/authfile/names.txt in a text processor such as NOTEPAD or WORDPAD (if you use WORD it is easy for unwanted formatting to sneak in).

2. Edit the file. Take care to follow the format of the existing entries *exactly*

3. Check that you have not included extra spaces, full stops, or line breaks, before within or at the end of new entries.

4. Save and close file.
Section 4 Managing the Committee Document System

On this page: 4.5 Re-attaching the CDocS Template to the Document

4.5 Re-attaching the CDocS Template to the Document

If an existing document is reopened, and half the CDocS buttons are missing, and the rest won’t work; then document is no longer attached to its template. Either it has been moved from one location or computer to another, for example as an email attachment; or you are viewing rtf version. In the latter case, use the doc version and re-save as rtf when you have finished making changes; if you only have the rtf version then save it as a word document (use the FILE, SAVEAS and choose WORD DOCUMENT as file type). In any event, if you wish to edit and re-save the document it needs to be attached to its template.

To re-attach the template

1. Open the document in Word.
2. Choose FILE, TEMPLATES
3. Click ATTACH. The ATTACH TEMPLATE dialogue box is displayed. In this box...
4. Find the CMMTTEE directory on your system. If necessary use the FIND FILE facility to locate it. (Go to top of directory tree, probably MY COMPUTER, and type cmmttee - note spelling - into the FILE NAME box, and click FIND NOW)
5. Open the CMMTTEE directory. There are other directories inside it.
6. Open the TEMPLATES directory (if there is no TEMPLATES directory inside this CMMTTEE directory then look for another CMMTTEE directory)
7. Open ERM directory (inside the TEMPLATES directory)
8. The files inside are templates; pick the correct template for the document type:
   - agenda choose ermagen
   - minutes choose ermmins
   - summary report choose ermrept (only use for summary report)
9. Okay - to close the ATTACH TEMPLATES dialogue box
10.(Back in the document) Close the document: Agree to save changes!
11.Re-open the document: the CDocS buttons should appear and come to life.
12.Run the style checker (CHECKSTYLES button). If there are style errors (where styles were previously correct) you have attached the wrong template and will need to try again.
## 5.1 Alphabetical List

<table>
<thead>
<tr>
<th>style name</th>
<th>description of style function</th>
<th>examples are of content: formatting will vary with platform</th>
<th>document type</th>
</tr>
</thead>
<tbody>
<tr>
<td>AlpList($n$)</td>
<td>list item preceeded by letter</td>
<td>available for body items plus items at level 1, 1a, 2 &amp; 2a</td>
<td>agenda minutes report</td>
</tr>
<tr>
<td><strong>example:</strong></td>
<td>a) the committee document system is a tool…</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Anchor</td>
<td>Part of the link apparatus. <em>In on-line versions of the document</em> this text is used as an anchor for a link to other document - it usually appears in blue</td>
<td></td>
<td>agenda minutes report</td>
</tr>
<tr>
<td><strong>example in blue:</strong></td>
<td>MINUTES OF THE MEETING..</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANormal</td>
<td>basis of Agenda styles: do not use</td>
<td></td>
<td>agenda</td>
</tr>
<tr>
<td>ApolHead</td>
<td>heading introducing a list of committee members who did not attend but rendered their apologies</td>
<td></td>
<td>minutes</td>
</tr>
<tr>
<td><strong>example:</strong></td>
<td><strong>Apologies:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AppHead</td>
<td>heading introducing a list of appendixes</td>
<td></td>
<td>report</td>
</tr>
<tr>
<td>BodyCaption</td>
<td>Caption for table, graphic or other object for short report with no internal headings. This style precedes BodyObject or BodyTable.</td>
<td></td>
<td>report</td>
</tr>
<tr>
<td>BodyHead</td>
<td>The main heading. use AGENDA for an agenda or the main title for a report or paper. note this will be used for searches for the document</td>
<td></td>
<td>agenda report</td>
</tr>
<tr>
<td><strong>example:</strong></td>
<td><strong>AGENDA</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BodyObject</td>
<td>graphic or other object to be inserted into short report with no internal headings. Usually preceded by BodyCaption</td>
<td></td>
<td>report</td>
</tr>
<tr>
<td>BodyRec($n$)</td>
<td>recommendation in short report with no internal headings available plus items at level 1, 1a, 2 &amp; 2a</td>
<td></td>
<td>report</td>
</tr>
<tr>
<td>BodyTable</td>
<td>style for a table in short report with no internal headings. Use Note: create the table using the Word tables facilities, then select the entire table and style as BodyTable.</td>
<td></td>
<td>report</td>
</tr>
<tr>
<td>BodyText</td>
<td>general text for content of short report with no internal headings</td>
<td></td>
<td>report</td>
</tr>
<tr>
<td><strong>example:</strong></td>
<td>text for short reports</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BullList($n$)</td>
<td>bulleted list</td>
<td>available for body items plus items at level 1, 1a, 2 &amp; 2a</td>
<td>agenda minutes report</td>
</tr>
<tr>
<td><strong>example:</strong></td>
<td>• the committee document system is a tool…</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clerk</td>
<td>name and office of clerk</td>
<td></td>
<td>agenda</td>
</tr>
<tr>
<td><strong>example:</strong></td>
<td>Mr A Scrimgeour Clerk to Committee</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CommitteeHead</td>
<td>Paragraph style. the committee name as a main heading inserted by the wizard</td>
<td></td>
<td>agenda minutes</td>
</tr>
</tbody>
</table>
### Appendix I  CDocS Style Guide

*On this page: 5.1 Alphabetical List*

<table>
<thead>
<tr>
<th>style name</th>
<th>description of style function</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>example:</strong></td>
<td><strong>Effective Records Management Project</strong></td>
</tr>
<tr>
<td></td>
<td>examples are of content: formatting will vary with platform</td>
</tr>
<tr>
<td><strong>CommitteeName</strong></td>
<td>Character style. used for the committee name inside CommitteeHead &amp; MeetingHead</td>
</tr>
<tr>
<td><strong>Default Paragraph Font</strong></td>
<td>removes character styles from text restoring it to the local paragraph style <strong>tip:</strong> use to remove <strong>emph</strong> formatting</td>
</tr>
<tr>
<td><strong>Department</strong></td>
<td>character style for department name: part of Persname</td>
</tr>
<tr>
<td><strong>example in red:</strong></td>
<td>Dr J Currall Computing Service <a href="mailto:j.currall@compserv.gla.ac.uk">j.currall@compserv.gla.ac.uk</a></td>
</tr>
<tr>
<td><strong>DocIdentifier</strong></td>
<td>Unique ID for document</td>
</tr>
<tr>
<td><strong>example:</strong></td>
<td>wizard generated: top right of document</td>
</tr>
<tr>
<td></td>
<td>gla.aspu/erm/cdocs_ug/1999-04-26/1</td>
</tr>
<tr>
<td><strong>DocStatus</strong></td>
<td>Text identifying status of document (ie DRAFT). Top right of document note: for <strong>Minutes</strong> this field states whether Minutes have been formally approved</td>
</tr>
<tr>
<td><strong>example:</strong></td>
<td>DRAFT</td>
</tr>
<tr>
<td><strong>Email</strong></td>
<td>email address. Link inserted automatically during conversion to web document</td>
</tr>
<tr>
<td><strong>example:</strong></td>
<td>can occur separately or as part of PersListEntry</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:j.currall@compserv.gla.ac.uk">j.currall@compserv.gla.ac.uk</a></td>
</tr>
<tr>
<td><strong>Emph</strong></td>
<td>emphasis. CDocS style replaces use of Bold.</td>
</tr>
<tr>
<td><strong>example:</strong></td>
<td>use to <strong>emphasise</strong> words in place of bold button. Emph formatting will be maintained in conversions</td>
</tr>
<tr>
<td><strong>EndAuth</strong></td>
<td><em>Prepared by: [persname] (office)(email)</em></td>
</tr>
<tr>
<td><strong>example:</strong></td>
<td>appears at end of document.</td>
</tr>
<tr>
<td></td>
<td><strong>Prepared by: Mr A Scrimgeour Clerk to Committee <a href="mailto:A.Scrimgeour@compserv.gla.ac.uk">A.Scrimgeour@compserv.gla.ac.uk</a></strong></td>
</tr>
<tr>
<td><strong>EndDate</strong></td>
<td>current date (inserted when document is saved). Appears at end of document:</td>
</tr>
<tr>
<td><strong>example:</strong></td>
<td><em>Last modified [LastModDate]</em></td>
</tr>
<tr>
<td></td>
<td><em>Last modified on: Monday 25 January 2000</em></td>
</tr>
<tr>
<td><strong>EndVersion</strong></td>
<td>Version <em>n</em></td>
</tr>
<tr>
<td><strong>example:</strong></td>
<td>version number. appears at end of document</td>
</tr>
<tr>
<td></td>
<td>Version: 2</td>
</tr>
<tr>
<td><strong>Footer Header</strong></td>
<td>The Document Identifier appears as a footer of print formatted versions of the document but is not relevant to none page formats. There is no header.</td>
</tr>
<tr>
<td>Style Name</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Heading (n)</td>
<td>Word standard styles for headings. Do not use. Use ItemHead(n) instead.</td>
</tr>
<tr>
<td>Href</td>
<td>Full URL or local reference to another document; part of the linking mechanism for HTML version of document hidden text, visible only with show/hide button or show hidden text.</td>
</tr>
<tr>
<td>Idno</td>
<td>Not currently in use constituent of Persname</td>
</tr>
<tr>
<td>InatHead</td>
<td>In attendance heading: introduces list of people, other than committee members, who attended</td>
</tr>
<tr>
<td>ItemAction(n)</td>
<td>Action plus initials available for items at level 1, 1a, 2 &amp; 2a.</td>
</tr>
<tr>
<td>ItemCaption(n)</td>
<td>Caption for table, graphic or other object, available for captions at all levels. This style precedes ItemObject(n) or ItemTable(n).</td>
</tr>
<tr>
<td>ItemDisp(n)</td>
<td>Detailing the disposal available for items at level 1, 1a, 2 &amp; 2a.</td>
</tr>
<tr>
<td>ItemDispBlsd(n)</td>
<td>Disposal as bulletted list available for items at level 1, 1a, 2 &amp; 2a.</td>
</tr>
<tr>
<td>ItemHead(n)</td>
<td>Item heading available for headings at level 1, 1a, 2 &amp; 2a.</td>
</tr>
<tr>
<td>ItemId</td>
<td>Identifier for item within document (item number). Id is only unique within the document and does not apply outwith document. Id format depends on doc type</td>
</tr>
<tr>
<td>ItemObject(n)</td>
<td>A graphic or other object available at all item levels. Usually preceded by ItemCaption(n).</td>
</tr>
<tr>
<td>ItemRec(n)</td>
<td>Item recommendation available at all item levels.</td>
</tr>
<tr>
<td>ItemTable(n)</td>
<td>Style for a table content. Available at all levels. Use Note: create the table using the Word tables facilities, . then select the entire table and style as ItemTable(n).</td>
</tr>
<tr>
<td>ItemText(n)</td>
<td>General text for item available for body items plus items at level 1, 1a, 2 &amp; 2a.</td>
</tr>
</tbody>
</table>
### Appendix I  CDocS Style Guide

*On this page: 5.1 Alphabetical List*

<table>
<thead>
<tr>
<th>style name</th>
<th>description of style function</th>
<th>document type</th>
<th>example</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>examples are of content: formatting will vary with platform</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>example:</strong></td>
<td>text for level 1 item</td>
<td>report</td>
<td></td>
</tr>
<tr>
<td><strong>LastModDate</strong></td>
<td>A field containing the date the document was created or last modified</td>
<td>agenda minutes</td>
<td></td>
</tr>
<tr>
<td><strong>example:</strong></td>
<td><em>current date is automatically inserted whenever doc saved Do not update manually.</em></td>
<td>report</td>
<td></td>
</tr>
<tr>
<td><strong>MeetingDate</strong></td>
<td>The date of the meeting. A character style contained within MeetingHead</td>
<td>agenda minutes</td>
<td></td>
</tr>
<tr>
<td><strong>example in red</strong></td>
<td>A meeting of the Effective Records Management Project will be held on Friday 4 June 1999 at 11.00 am in The Melville Room</td>
<td>report</td>
<td></td>
</tr>
<tr>
<td><strong>MeetingHead</strong></td>
<td>heading describing when and where the meeting is held. Contains CommitteeName MeetingDate, MeetingTime and MeetingLocation</td>
<td>agenda minutes</td>
<td></td>
</tr>
<tr>
<td><strong>example: (from agenda)</strong></td>
<td>A meeting of the Effective Records Management Project will be held on Friday 4 June 1999 at 11.00 am in The Melville Room</td>
<td>agenda minutes</td>
<td></td>
</tr>
<tr>
<td><strong>MeetingLocation</strong></td>
<td>location of the meeting. A character style contained within MeetingHead</td>
<td>agenda minutes</td>
<td></td>
</tr>
<tr>
<td><strong>example in red</strong></td>
<td>A meeting of the Effective Records Management Project will be held on Friday 4 June 1999 at 11.00 am in The Melville Room</td>
<td>agenda minutes</td>
<td></td>
</tr>
<tr>
<td><strong>MeetingTime</strong></td>
<td>start time of the meeting. A character style contained within MeetingHead</td>
<td>agenda</td>
<td></td>
</tr>
<tr>
<td><strong>example in red</strong></td>
<td>A meeting of the Effective Records Management Project will be held on Friday 4 June 1999 at 11.00 am in The Melville Room</td>
<td>agenda</td>
<td></td>
</tr>
<tr>
<td><strong>MNormal</strong></td>
<td>basis for minutes document styles</td>
<td>minutes</td>
<td></td>
</tr>
<tr>
<td><strong>Normal</strong></td>
<td>always present in the style list but do not use.</td>
<td>agenda minutes</td>
<td></td>
</tr>
<tr>
<td></td>
<td>do not use directly</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>NumList(n)</strong></td>
<td>numbered list for items available at all levels.</td>
<td>agenda minutes</td>
<td></td>
</tr>
<tr>
<td><strong>example:</strong></td>
<td>1. the committee document system is a tool…</td>
<td>agenda minutes</td>
<td></td>
</tr>
<tr>
<td><strong>Office</strong></td>
<td>optional part of Persname where person is acting in official capacity</td>
<td>agenda minutes</td>
<td></td>
</tr>
<tr>
<td><strong>example in red:</strong></td>
<td>Mr A J Scrimgeour Clerk to Committee <a href="mailto:ajs@compserv.gla.ac.uk">ajs@compserv.gla.ac.uk</a></td>
<td>agenda</td>
<td></td>
</tr>
<tr>
<td><strong>PageNumber</strong></td>
<td>The page number is centered at the foot of all but the first page.</td>
<td>agenda minutes</td>
<td></td>
</tr>
<tr>
<td></td>
<td>note: page numbers can only apply to formats designed for printing: do not use to reference parts of the document</td>
<td>agenda minutes</td>
<td></td>
</tr>
<tr>
<td><strong>PersListEntry</strong></td>
<td>[Name of person] (dept) (office) [email address]</td>
<td>minutes</td>
<td></td>
</tr>
<tr>
<td><strong>example</strong></td>
<td>Used in Present, In Attendance &amp; Apologies lists</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>PersHead</strong></td>
<td>heading introducing a list of committee members present at the meeting</td>
<td>minutes</td>
<td></td>
</tr>
<tr>
<td><strong>example:</strong></td>
<td><strong>Present:</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### 5.1 Alphabetical List

<table>
<thead>
<tr>
<th>Style Name</th>
<th>Description of Style Function</th>
<th>Examples of Content: Formatting Will Vary With Platform</th>
<th>Document Type</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PersName</strong></td>
<td>Character style. Name of person, e.g., committee member</td>
<td>Note the Enter PersName button on the toolbar. Dr J Curral, Computing Service, <a href="mailto:j.currall@compserv.gla.ac.uk">j.currall@compserv.gla.ac.uk</a></td>
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<td><strong>PrevMeetingDate</strong></td>
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<td>University of Glasgow</td>
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<td><strong>UNIVERSITY OF GLASGOW</strong></td>
<td>Agenda, Minutes, Report</td>
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<td>Agenda, Minutes, Report</td>
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APPENDIX II: SPECIMEN DOCUMENTS

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6.1 Specimen Agenda

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AGENDA

1. Minutes of the Meeting held on Friday 22-October-1999

2. Matters Arising
   2.1 CICSE Student e-mail addresses (UIC999061)
   2.2 Network Service (UIC999061)
   2.3 Superuser Upgrade (UIC999063)

3. Course(s) Business
   3.1 Daily Management System
   3.2 E-mail Attachments
   3.3 E-mail Transmission of Documents
   3.4 CICSE Staff Office
   3.5 Proprietary
   3.6 CICSE (The situation of the University of Glasgow)

4. Matters of Student Concern

5. Reports from the Convener of Advisory Committee on Standards, Guidelines and Protocol

6. Report from the Director of Computing Services

7. Reports from the Director of MIS
   Status Report for 1997 Project
   Project Progress Plan

8. Reports from the Director of Media Services

9. Matters of PU and Faculty Concern

10. Any Other Business

11. Date of Next Meeting

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Prepared by: Mr. Alistair Gregory
Clerk to Committee
Alistair@computers.gla.ac.uk

Last modified on: Monday 24 January 2000

Version: 1.0

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6.2 Specimen Minutes

Present:

Dr M Sullivan, Convener; M Sullivan@vet.gla.ac.uk

Dr J W Huggett-Arts, huggett@archaeology.gla.ac.uk

Mr A J Strangeway-Clerk to Committee, ajc@comperv.gla.ac.uk

In attendance:

Dr J Curral, Computing Service; J Curral@comperv.gla.ac.uk

Prof G M Newlands, Diversity; G Newlands@diversity.gla.ac.uk

Minutes of the meeting held on Friday 29th January 1999 were published on the Web on 29th January 1999 and were approved on 11th February 1999.

IUC/1998/23: Convener’s Business

IUC/1998/23.1 e mail security

The IUC welcomed the paper prepared by Dr James Curral on the use of e mail. The IUC agreed that it provided a very helpful overview of potential areas of difficulty.

The IUC agreed that the guidelines should be forwarded to the ISC for approval and that, if approved, they should be circulated to the wider community. The IUC also agreed that the guidelines might form part of the IT course for students.

Action: ISC

IUC/1998/23.2 Ten Client computing: Costings

The paper prepared at the meeting on “An Introduction to Microsoft NT Terminal Server” was discussed, and the advantages and disadvantages of WTS noted. The paper also contained a summary of recommendations for future actions, which were also discussed.

Action: All to note

IUC/1998/42: Date of Next Meeting

The next meeting of the Information Users Committee will be held on Friday 22nd October, 1999 at 02:00 pm.

Prepared by Mr Alex Strangeway Clerk to Committee, ajc@comperv.gla.ac.uk

Last modified on 30th April 1999

Version: 9

End
6.3 Specimen Summary Report

---UNIVERSITY-OF-GLASGOW---

Information Strategy Committee - Friday 5 November 1999

1. European Computer Driving Licence (IUC/1999/3.3)

The IUC recommends to the ISC that:

- the Computing Service become a test Centre for ECDL,
- the ECDL is not an appropriate baseline for undergraduates,
- departments may wish to consider ECDL for appropriate courses and students.

2. Email as a Mandatory Communication Route for course work (IUC/1999/4.1)

The IUC recommends that email should not be the mandatory method of communicating course information to students.

3. Smart Cards (IUC/1999/4.2)

Funding a report on SMART cards, it is IUC’s view that SMART cards will only be of value when they are truly multipurpose and cost-effective.

4. Diary Management (IUC/1999/5.2)

IUC agreed that a decision should be placed before the next IUC meeting (28 January 2000).

5. Email Address Disclosure (IUC/1999/6.1)

The IUC recommends that the ISC support the case of Computing Service that the decision of the Student Welfare Committee with regard to student email confidentiality is reconsidered.


Consensus raised that the Network Team may not adequately resourced, and that this should be investigated.

7. Alternatives to Microsoft (IUC/1999/6.4)

The IUC continues to keep a watching brief on alternatives. Currently StarOffice is being considered as a serious alternative to Microsoft Office.

8. Data Protection Act (IUC/1999/8.2)

The IUC recommends to the ISC that steps be taken to develop a University-wide awareness of the key issues and conditions of the DPA and its impact on the community.

Prepared by: Id: A. Stronigos (Clerk) A.Stronigos@comserv.gla.ac.uk
Last modified on: Friday 5 December 1999
Version: 1
Appendix II: Specimen Documents

6.4 Item Levels Document

ISC/1999/1: Minutes of the meeting held on Friday 7th May 1999

Minutes of the meeting held on Friday 7th May were published on the Web on 26th May and were approved on 29th June 1999.

ISC/1999/2: Matters Arising

- ISC/1999/2.1 Funding for INSEAD (ISC/1999/2.1a)
  - AW confirmed that funding had been secured for the collection associated with the -
    - Institute of Europe and East-European Studies.

ISC/1999/2.2 Policy Statements (ISC/1999/2.2)

- D: Freedom of information, Data Protection and IT Security
  - JC agreed to circulate the relevant URLs for the in-house guidelines for the ISC.
  - Action: AG/2

ISC/1999/2.3 Verification of digitised Senate advice

- The Clerk of Senate had noted that a system for verification of digitised Senate advice had been developed and that it was due to be released.

ISC/1999/4: Year 2000 - Update

A note of the considerable amount of effort that had been put into the Year 2000 project and acknowledged in particular the role of David Tildesley. He noted how highlighting areas of particular concern.

With reference to the report submitted to SHEFC, D/C drew the attention of the ISC to concerns over Microsoft systems which are not Y2K compliant. In addition, he noted that there had been delays in the release of patches.

ISC/1999/5: Integrated Information Project Board

- A note of the following discussion with the Secretary of Court and the Managing Group that suggested that the group should be abolished. The University Management Group had created a small group consisting of Prof. Malcom McLeod, Prof. Reg Whitehead, Eulalio Mackenzie and Prof. Arthur Allison to discuss the way forward.

- A note of the discussions which concluded that the constructive interaction between CAPU, ISPU and the Academic PUs must be encouraged, particularly in the major software systems that underpin CAPU, increasingly impacted on the whole University community.

ISC/1999/5.1 Prophecy

- The Project Board continues to investigate the way forward. "Prophecy" OpenView is a generalised tool. Clarks, PUs and Secretaries are being used in the evaluation process. Investigation continues into other possible packages. Requirements, based on the Finance Office, which have been submitted, are noted.

ISC/1999/5.2 Integration Project

- JC reported that the project with St. Andrews University, Paisley and RSAMD is progressing. Staff are currently being recruited for the project. Information on the project and its progress will be available on the Web in due course.
  - Action: AG/2
Contact Information:

Effective Records Management Project
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Prepared by: Jane Lee j.lee@archives.gla.ac.uk
Last modified on: Wednesday 29 March 2000
Version: 3