



**Corporate Services for the Natural Resource
Sector**

Information Management Branch

Standards for Versioned Documents

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1. Version Control

Document Version	Revision	Date	Author(s)	Change Reference
1.0.0	Final	2006-July-11	Todd Glover	Initial release
1.0.0	Draft	February 25, 2010	Dave Milne	Review
1.0.1	Final	March 25, 2010	Dave Milne	Updates to Ministry and logo; minor edit and format changes.
1.0.2	Final	February 16, 2012	L Solomon	Update to logo and change to CSNR
1.0.3	Final	September 17, 2014	L Solomon	Update some references to new standard and delivery format (.rtf)
1.0.4	Final	October 26, 2015	T Fulton	Updated table of contents section to make Bookmarks TOC a standard.

2. Introduction

2.1 Purpose

This document defines document naming and formatting standards for *versioned* documents. There are two main methods of organizing documents to consider: *versioned* documents and *dated* documents. Versioned documents are documents that are organized by the use of a version number. Dated documents are organized primarily by the use of the document's date (e.g. meeting minutes).

Versioned documents are generally:

- Systems standards
- System development life cycle (SDLC) documents, such as:
 - project charters
 - analysis and requirements documents
 - system design documents
 - user acceptance test (UAT) plans and UAT results
 - associated diagrams, generated reports, and appendices

Use of this standard is strongly encouraged for other documents for which versioning makes sense.

2.2 Audience

This document is directed at vendors and ministry staff who will be creating or managing versioned documents for the Sector.

2.3 Scope/Exclusions

The scope of this document covers all versioned documents delivered to or maintained by the Sector.

Where conflicts, if any, are perceived between this document and other standards, the Business Portfolio Manager must be consulted.

2.4 Assumptions

It is assumed that the audience has working knowledge of the Sector's SDLC process, standards around the content of those documents, and familiarity with document formats (in general) and tools to maintain documents.

2.5 Definitions

The following definitions apply throughout this document.

2.5.1 Standards

A standard is a specific statement of the rules and constraints governing the naming, contents, and operations of software. A standard must be followed. There is a contractual obligation on the part of the vendor/developer to adhere to all relevant standards.

2.5.2 Guidelines

A guideline is a method or custom, which through common usage has become an accepted method of work. A guideline is not enforced, and is not a standard.

2.5.3 Sector

Unless otherwise specified, "Sector" is taken to collectively mean the Ministries and agencies which are included under the umbrella of the Natural Resource Sector. All are served by a common Corporate Services Division and thus Information Management Branch (IMB) with the mandate to formulate and maintain application development standards.

2.5.4 Automatic Field

The term "Automatic Field" is used to mean a word or phrase within a document that whose value is generated based on information available to the system. In Microsoft Word, these are called "Field Codes". Examples relevant to this document include document filename, page number, total number of pages, and document date.

2.6 Contacts

All inquiries regarding these standards should be directed to the Business Portfolio Manager assigned to the project.

3 Document Formats

The following table outlines allowable formats depending on the type of document. Any exceptions to these document types requires prior approval from the Information Management Branch.

Table 3.1

Document Type	Document Format(s)	Document Extension
Standards Document	PDF HTML Microsoft Word	.pdf .html .doc / .docx
SDLC Documents	Microsoft Word Rich Text Format	.doc / .docx .rtf
Diagrams	PDF PDF (image) Visio PowerPoint Enterprise Architect	.pdf .png .vsd .ppt / .pptx .eap
Generated Reports	PDF	.pdf
Spreadsheets	Microsoft Excel	.xls / .xlsx

4 Document Naming Format

4.1 Character Set

Filenames must be composed of only the following characters:

- Uppercase or lowercase A-Z
- Numeric values
- Underscores and periods.

4.2 Layout

<target_product>_<document_type>[_<document_subtype>][_<document_revision>]>[_<miscellaneous>].<extension>

The name consists of ‘components’, some of which are optional, separated by periods, these will be explained in more detail below.

4.3 Field Descriptions

4.3.1 <target_product> REQUIRED

The <target_product> field identifies what is being developed through the document. Typically, the <target_product> will be either an *Application Development Document* or a *Systems Standard*.

4.3.1.1 Application Development Documents

In the case of an application development document, <target_product> is the approved application acronym plus the targeted application version (*not* the document revision). E.g.:

- RAR_3.1.0
- DWSCI_1.4.0
- JROP_1.0.0

Application acronyms must be approved by IMB in order to assure uniqueness. IMB recognizes that acronyms sometimes change, typically between the Requirements and the System Design steps. The application acronym used in a document name must be the approved acronym at the time that the document is created.

4.3.1.2 Systems Standards

In the case of a document describing a systems standard, <target_product> is the name of the standard plus the targeted version of the standard (*not* the document revision). E.g.:

- NRS_Systems_and_Application_Technology_Standards_1.1.0
- NRS_Java_Delivery_Standards_2.3.4
- NRS_Standards_for_Versioned_Documents_1.0.0

(Note: when systems standards are posted to the web, the version number is removed. This is done so that saved bookmarks can always refer to the latest document version.)

Ensure that NRS_ is prepended to the standard name when the document is the master for this standard and applies to all Ministries within the Sector. The master may contain links to sub-documents which identify specific standards that relate to one or more Ministries.

4.3.1.3 Versioning

The version number is always three parts separated by periods (major.minor.patch). In application development documentation, the patch level is typically 0 (zero). The initial final version for application versions and standards versions is 1.0.0.

Version numbers must be approved by the IMB to ensure consistency and correct use.

4.3.2 <document_type> CONDITIONAL

NOTE: REQUIRED ONLY FOR APPLICATION DEVELOPMENT DOCUMENTS

Only Application Development Document products have document types; System Standard products do not.

Document types should be selected from the list below. Any other types must be approved beforehand by the Business Portfolio Manager associated with the project.

Table 4.3.2

Document Type	Description
Requirements	Business Process Requirements document
Design	Software Design document
Project Charter	Project Charter document
UAT	UAT Plan

4.3.3 _<document_subtype> OPTIONAL

Used to denote additional components to a document, usually things like appendices not directly included in the document. In the case where this is an appendix, it should be named with the appendix number: E.g.:

JROL_1.2.0_Design_Appendix_B.doc	Appendix B of the Systems Design document for JROL_1.2.0, as an MS Word file
JROL_1.2.0_Requires_ERD.pdf	Entity-Relationship Diagram from the System Requirements for JROL_1.2.0, in PDF format

4.3.4 <document_revision> REQUIRED

This field denotes the revision level of the document, such as “draft1” or “draft02”.

For a document in its final form (such as a published standard, or application document that has been signed off), this field is removed.

Do not use a phrase like “final” to denote the completed or signed off version; the “final” version is indicated by the removal of the revision field only.

4.3.5 <miscellaneous> OPTIONAL

This field is used to denote additional information, such as comments on a draft of a document.

For example: architecture review comments on the 2nd draft of the System Design for the JROL 1.2.0 application could be:

JROL.1.2.0.Design. draft02.review_architecture.doc

Reviews may also be named by the people doing them, rather than by section:

JROL.1.2.0.Design. draft02.review_dmacdonald.doc

In situations where a document contains responses by the vendor to a review, naming such as the following may be applied:

JROL.1.2.0.Design. draft02.review_dmacdonald_vendor_response.doc

4.3.6 <extension> REQUIRED

Specifies the file type of the file

Must be one of the allowable formats for the given *document_type* (see Table 3.1)

4.4 Examples

The following scenarios are presented to aid in understanding the naming standards.

4.4.1 Scenario 1: Application Development Design Document

An existing application with acronym JROL is to be enhanced. Its current version is 1.1.3, its next version is targeted to be 1.2.0. Therefore,

- <target_product> is “JROL_1.2.0”;
- <document_type> is “Design”; and
- <extension> is “.doc”.

Table 4.3.1

Document Name	Explanation
JROL_1.2.0_Design_draft1.doc	This is the first draft of the System Design document for version 1.2.0 of the JROL application, being submitted for review.
JROL_1.2.0_Design_draft1_architecture_comments.doc	These are the comments on the draft1 revision from the Architecture group.
JROL_1.2.0_Design_draft1_da_comments.doc	These are the comments on the draft1 revision from the DA (Data Admin) group.

Document Name	Explanation
JROL_1.2.0_Design_draft1_vendor_response.doc	The vendor responds with clarifications and comments to the points raised in the reviews.
JROL_1.2.0_Design_draft2.doc	The vendor delivers revision 2 (draft2) of the System Design document, based on review comments and subsequent discussions.
JROL_1.2.0_Design_draft2_architecture_comments.doc	Architecture reviews the document; although perhaps raising some minor points, the document is acceptable.
JROL_1.2.0_Design.doc	The Ministry accepts draft2 as the final version and on signoff renames it (dropping the document revision). This is the final design document for the build.

5 Document Layout

5.1 Title Page

A common title page look and feel should be used. See Appendices A and B for a suggested sample for Application Development and Standards documents. Templates for SDLC deliverables are available from the “All standards page” at http://www.env.gov.bc.ca/csd/imb/3star/alpa_standards.html

5.1.1 Title Page for Application Development Documents

A title page for application development documents must always include:

- The application name
- The application acronym and version
- The name of the Ministry and Business Unit (Branch)
- The name and address of the vendor if developed externally
- The latest date of modification of the document
 - Typed in, *not* as an Automatic Field
- The document filename, without path
 - Where possible, generated using an Automatic Field

5.1.2 Title Page for System Standards

- The name of the standard
- The version of the standard
- The document filename (no path)
 - Where possible, generated using an Automatic Field
- The latest date of modification of the document
 - Typed in, *not* as an Automatic Field

- Reference to Corporate Services for the Natural Resource Sector and Information Management Branch

5.1.3 Title Page Exceptions

A title page is not required for single page documents (e.g. diagrams), documents supplementing a larger document (e.g. a Design appendix), or in documents generated by a tool (e.g. automatically generated data dictionary reports in PDF).

5.2 Use of Automatic Fields for Dates

Never use Automatic Fields (in MS Word called “Field Codes”) to automatically insert dates within the document. Dates must be explicitly typed to prevent them from changing when the document is opened, printed, re-saved, or any other system generated event.

5.3 Headers and Footers

There are neither requirements nor standards for headers.

Footers must contain:

- The document filename
- The page number and total number of pages
- Automatic Fields should be used wherever possible for the content of footers
- Footers on the title page and table of contents are optional
- Page numbering may be omitted in one-page documents (e.g. diagrams)
- Examples:

“JROL_1.2.0_Design_draft2.doc

Page 3 of 35”

“Standards_for_Versioned_Documents_1.0.0_draft04.doc

Page 10 of 10”

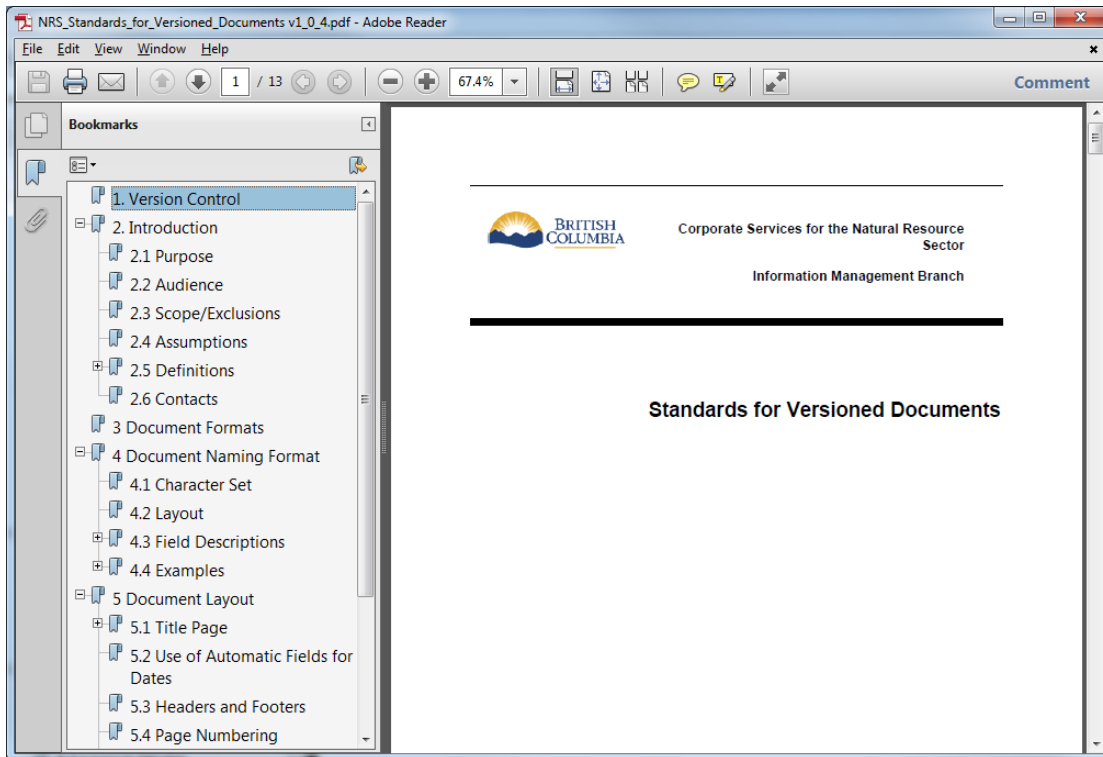
5.4 Page Numbering

In the interests of simplicity, page numbering should begin with the title page as page 1, and continue with sequential page numbering throughout.

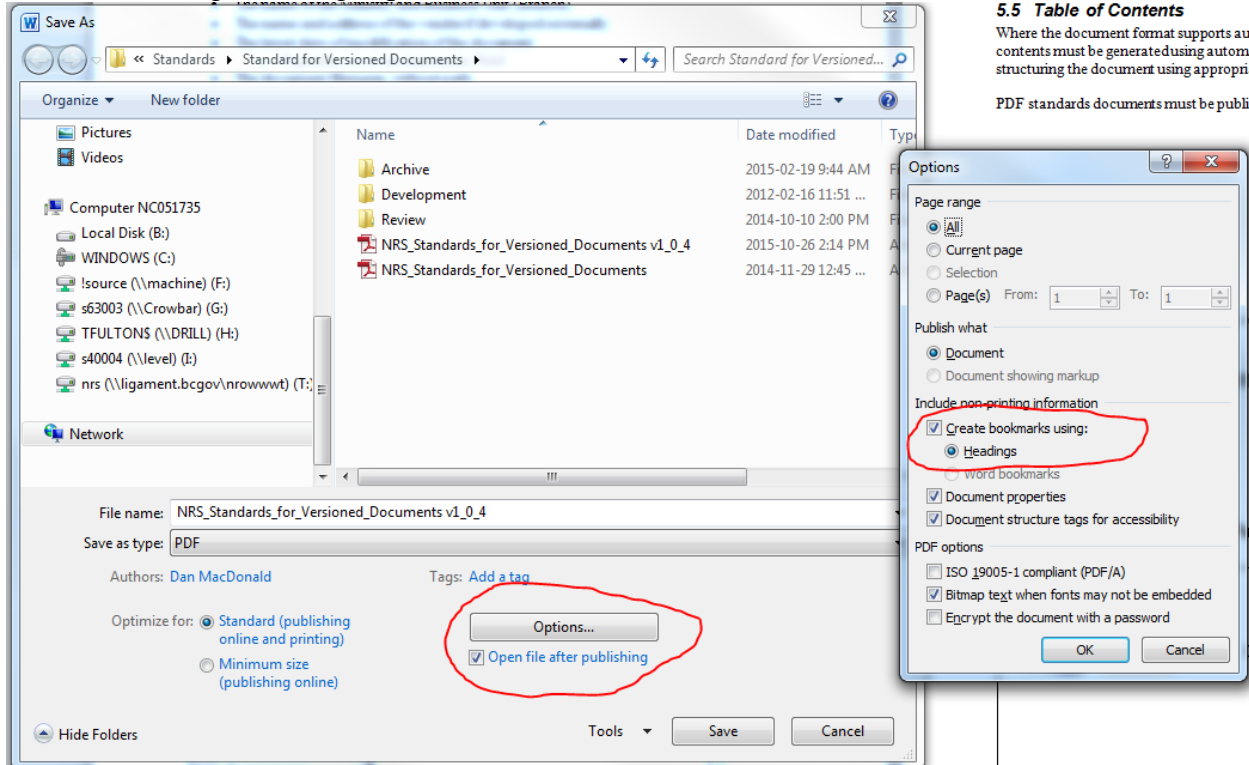
5.5 Table of Contents

Where the document format supports automatic generation of table of contents, the table of contents must be generated using automatic tools. Note that in Microsoft Word, this requires structuring the document using appropriate “Heading” styles.

PDF standards documents must be published with a Bookmarks table of contents. For example:



To create the Bookmarks TOC save the document as PDF and in Options check the Create bookmarks using: Headings option.



5.5 Table of Contents

Where the document format supports automatic contents must be generated using automatic structuring the document using appropriate

PDF standards documents must be published

Appendices

Appendix A – Sample Title Page for Application Development Documents



**Corporate Services for the Natural Resource
Sector**

Information Management Branch

Generic Ministry Information System GMIS 2.3.0

System Design

Prepared for
**Generic Monitoring Branch
Ministry of Environment**

Prepared by
**Happy Camper Systems Inc.
221B Cloak Hill Road
Sidney, BC
www.happycampersystems.com**

Last Updated: October 31, 2006
Document: GMIS_2.3.0_Design_draft1.doc

Appendix B – Sample Title Page for System Standards



**Corporate Services for the Natural Resource
Sector**

Information Management Branch

Standards for Cognitive XML Meshes

Last Updated: February 23, 2007
Version: 1.0.0
Document: Standards_for_Cognitive_XML_Meshes_1.0.0.doc