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Directorate General XIII - E/4

Electronic publishing and Libraries



TELEMATICS APPLICATIONS PROGRAMME 1994-1998

Telematics for Libraries

Deliverables Guide

July 1996

Telematics for Libraries

Deliverables Guide

A guide to the production of project deliverables

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Preface



EUROPEAN COMMISSION

DIRECTORATE GENERAL XIII

Telecommunications, information market and exploitation of research

Information industry and market and language processing

Electronic publishing and libraries

LUXEMBOURG, JULY 1996

Over the last four years, Telematics for Libraries has developed and matured, and so the number of deliverables produced by Libraries projects has increased. Many of the deliverables encapsulate project teams' experience and expertise, which should be of very real use to the European Libraries community. However, in order to publish these, it is imperative that they are produced to a high standard, so that the community at large can benefit from them.

For this reason, I am pleased to see the completion of this Deliverables Guide, which contains information, advice and guidelines to help project team members produce good quality, consistent deliverables.

There are further important reasons for observing the guidelines in this document. First, the guidelines will actually save time and effort for project teams; they include guidance on information which can safely be excluded from deliverables, and on referencing which will help team members find and refer to the deliverables efficiently. Second, adherence to the guidelines will ensure that deliverables are unambiguous, and therefore their precise status will always be clear, leading to more effective working. Last (but not necessarily least), proper referencing and other management controls will make the Project Officers' work easier!

I trust that you will find this guide helpful and easy to use. If you have any comments, please pass them to the Unit; we will revise and re-issue the Deliverables Guide when and if necessary.

*A. Iljon
Head of Unit,
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1. About this document

1.1 Who is this document for?

This document is for all members of Telematics for Libraries project teams who produce technical deliverables, or who are responsible for their production. One copy is being sent to each organisation in every Telematics for Libraries project. Further copies are available on request, on paper or in digital form (see the annex “Obtaining further copies of this guide”).

While this guide is intended for Libraries projects, it is based on basic principles of good practice and quality, and may therefore also be relevant to other projects..

1.2 What is a “deliverable”?

Technically, a “deliverable” is anything which you have to “deliver” to the Libraries Unit, that is anything which is defined as a “deliverable” in the Technical Annex to your contract. More meaningfully, a deliverable is something useful or significant which the project has produced.

1.3 What is this guide?

This guide contains advice on how to manage, produce and prepare deliverables. Note the word *advice*: little in this guide is mandatory. However, experience in Telematics for Libraries has shown that the quality of deliverables can be improved quite easily. If the advice in this guide is followed, projects will produce deliverables which are more useful to the team and to other readers.

1.4 Relationship to other documents

This guide is for the production of technical deliverables. Projects also have to produce project reporting documents (progress reports, management reports, etc). Guidelines for the contents of project reporting documents are presented in *Guidelines for Project Reporting*, available from DGXIII E/4 on request. However, many of the ideas for format and presentation in this Deliverables Guide can usefully be applied to project reporting documents.

1.5 What is its scope?

The guide provides advice on:

- management controls;
- presentation formats;
- structuring;

and other practical points for technical deliverables. Most of the guide is about paper deliverables, because most deliverables are paper documents. The guide focuses especially on paper deliverables intended for publication. However, many of the ideas can also be applied

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to other forms of deliverables. Wherever possible, it would be good practice to apply the principles in this guide to all deliverables.

As well as advice, the guide includes tools to help you in practice, namely:

- checklists;
- document templates for use with the most common word processing packages;
- Libraries Programme logos in digital form;
- a deliverable submission sheet;
- a test document for testing e-mail procedures.

This guide has been produced using the templates.

1.6 How to implement the ideas in this guide

Do not assume that everyone in your team will automatically adopt all the ideas in this guide. Instead, make sure that everyone in the team agrees on how the guide will be applied.

For projects which are just starting, the project manager should:

- review this guide to pick out ideas which are or are not relevant to the project;
- take preliminary decisions (eg which templates to use, the numbering schemes to be used);
- get project team members to agree, if convenient at a meeting;
- write up the agreement briefly, and circulate it within the team to act as an *aide mémoire* when preparing deliverables.

See also section 3.

Projects which are well established should not necessarily abandon existing practices and project standards to adopt this guide. Projects with existing comprehensive standards need not change. However, projects with fewer, less detailed standards, should consider using some or all of this guide to supplement existing practices, as long as the change-over is not going to cause too much disruption.

Projects which are nearly complete should not, in general, change existing practices. However, they should consider the ideas in section 6 when preparing the final report.

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1.7 Comments about this guide

The Libraries Unit intends to maintain this guide from time to time, as needed. If you have any questions or comments about the guide, please send them to:

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2. What is a “deliverable”?

Technically, a “deliverable” is anything which you have to “deliver” to the Libraries Unit, that is anything which is defined as a “deliverable” in the Technical Annex of your contract. More meaningfully, a deliverable is something useful or significant which the project has produced.

This guide is designed to help you produce deliverables; in practice however, you can also use it to help you prepare other products of your project, such as documents which are developed for external dissemination or documents intended for use solely within the project.

2.1 Why do we need deliverables?

Deliverables serve several purposes, which sometimes have conflicting requirements. Your objective should be to balance these conflicts, to maximise the usefulness of the deliverables you produce. Deliverables can be produced for one or more of the following three reasons:

- *as a medium of technical communication within the project.* This is possibly the most important reason for producing deliverables. Here, a deliverable is produced as the “output” of one work package or task; it then becomes the “input” to another work package or task. For example, a task to analyse functional requirements can produce a *Requirements Specification*. This deliverable is then passed to the next task, usually a technical specification task, as a basis for work. Clearly the most important factors are clarity, completeness and technical precision.
- *for dissemination.* All EC-funded projects are required to disseminate the results of their activities. This is so that European organisations, outside the project team, can get some benefit from the European funding. The Libraries Unit therefore encourages project teams to make as many deliverables as possible public. Those of greatest interest and value to others are published. For dissemination, technical precision and completeness are less important than clarity and ease of reading (at least in some cases).
- *to demonstrate that work has been done and to show the quality of the work.* Deliverables are required by the rules of EC-funded programmes so that payments can be made. Projects are also reviewed periodically by External Reviewers. In practice, the major input to External Reviewers is a set of deliverables. Reviewers seek to understand the work done in some detail, and they also need to establish the levels of quality. So the important factors here are clarity, completeness, technical precision and good structuring.

Note that the requirements of technical precision and ease of reading can conflict. A very technical document may be needed to communicate some technical ideas internally during a development process; but for dissemination, a simpler, less technical document is likely to be appropriate.

2.2 What kinds of deliverables are there?

The main kinds of deliverables are:

1. physical publications (eg paper, CD-ROM, diskette);

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2. network publications (usually World Wide Web);
3. events (eg conferences, project launch) and accomplishments (eg completion of a work package);
4. collections of data (eg test bibliographic database, set of scanned images);
5. software.

2.3 How should deliverables be delivered?

2.3.1 Physical publications

Physical publications are the most common form of deliverable. Mostly they are on paper, though an increasing number are on CD-ROM or diskette.

Send two or three copies to the EC project officer, as follows:

- for all deliverables: one for the official Libraries Unit file, one as the EC Project Officer's working copy;
- for case of paper deliverables which are public: one additional unbound copy to allow for photocopying.

In all cases, complete the form in the annex "Deliverables submission sheet" and include it with the deliverable you are sending.

2.3.2 Network publications

Most projects are now making deliverables available by network, and in some cases the deliverables will only be available by network. Inform the EC project officer, in writing, that the network publication is available, giving details on how it can be accessed. Ensure the notification clearly states that it relates to a specific deliverable. See the annex "Deliverables submission sheet" for a sample format.

Most network publications will be accessible on the World Wide Web (WWW); in this case state the URLs in your notification.

2.3.3 Events and accomplishments

Inform the EC project officer in writing of the event or accomplishment. Ensure the notification clearly states that it relates to a specific deliverable. See the annex "Deliverables submission sheet" for a sample format.

If the event is a meeting of any sort, include a brief description of the attendees, programme and conclusions or findings (as appropriate). If proceedings or minutes of the meeting are available, enclose a copy.

For other accomplishments, explain what has been achieved, when, by whom, any open or unresolved issues, etc as appropriate.

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2.3.4 Collections of data

Some Technical Annexes specify data as deliverables. Usually this is data which is required within the project, such as test databases, lists of resources etc. Do not send a copy to the project officer unless the EC Project Officer asks for a copy. Instead, inform the EC project officer, in writing, that the deliverable is complete and is available for examination. Ensure the notification clearly states that it relates to a specific deliverable. See the annex "Deliverables submission sheet" for a sample format.

2.3.5 Software

In most cases, do not send a copy to the project officer, unless you have explicitly discussed sending a copy.

There are some exceptions, usually where the software is a complete demonstration package or a major result of the project. In these cases, send a copy, making sure that it:

- is self-contained (ie the copy you send contains all the required software and data objects for it to be usable);
- is fully documented (ie software and hardware prerequisites, how to install it, how to operate it, any particular points to note);
- requires no hardware other than a standalone desktop PC with CD-ROM drive;
- requires no special software (such as a relational database);
- is properly labelled (see section 7.1)

Do not send program listings, tapes or cartridges unless the EC Project Officer requests them. Instead, inform the EC project officer, in writing, that they are available; ensure the notification clearly states that it relates to a specific deliverable. See the annex "Deliverables submission sheet" for a sample format.

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3. Preparing to produce paper deliverables

Before your project produces any deliverables, you need to establish project documentation standards for them. This standards-setting should normally take place at the beginning of the project, around the time of the kick-off meeting (ie at the same time as other standards, such as time reporting, are agreed).

This guide is intended as a basis for your project documentation standards.

The standards should ideally include the following:

- what word processor (or what file format) will be used to allow interchange of document files between partners;
- page layouts for covers, title pages, contents pages, the main part of reports, etc.;
- names and sizes of fonts, and the purposes for which they are to be used. This is especially important where documents are to be built up from several sources (as using the same word processor with different fonts can give significantly different results). The ideal is to choose a set of fonts which are common to the platforms used by the project partners. In some cases, you will need to choose fonts which are common between platforms; for example, the fonts chosen for the templates in this guide, are:

Times New Roman — used for most of the text

Arial (bold) — used for headings

as they are found on many (though not all) Windows and Macintosh systems;

- styles (margins, line spacing, paragraph spacing, etc.);
- numbering conventions;
- the use of graphics.

An annex to this guide contains style sheets and templates for use with *Microsoft Word* and *WordPerfect*. These word processors are chosen because they are the most widespread. However, you are not limited to these products, you are free to use any text editor when preparing deliverables.

Note that this guide has been produced using the style sheets in the annex.

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4. Management Controls

4.1 The need for management controls

During the course of any project, the number of documents produced increases. Many of these contain information which is critical to the success of the project. Therefore, it is essential that the documents are controlled adequately, so that users of documents can always:

- find a document that they need;
- know whether a document is up-to-date;
- know who wrote a document, in case clarification is needed;
- know how old a document is;
- know whether a document is complete;
- know whether a document can be copied outside the team.

This is more difficult than it appears at first sight. It is often the case that more documents are produced than originally planned. This increase means that readers cannot be confident of the above points unless the documents are carefully controlled. Examples which have occurred in practice are:

- The team planned for one deliverable per work package. Accordingly, documents were numbered WP1, WP2, and so on. In practice, each partner needed to write a separate report for some work packages, to allow for different situations in each country. Eventually, several documents were prepared with identical title and number, making it impossible understand the status of each document. Incorrect decisions were taken because one document was missing.
- The team planned for one version of each deliverable to be published. In practice, a second version of some deliverables had to be published, because some partners noticed mistakes and omissions in the first version. In some cases, a third version had to be published at the request of the External Reviewers. In the end, there were three versions of some documents in the project file, with identical title and numbers. Because there was no version number or date on the document, and because there was no central record of deliverables, a programming team used the wrong version to develop some programs.
- A partner prepared a deliverable defining an organisational approach. Another partner needed to speak to the author to clarify a detail, but the author's name was not shown on the document. As a result, a lot of time was wasted finding the author.

These are just three examples. Management controls applying to the project's deliverables (and other documents) are therefore **mandatory**. The most basic controls refer to document labelling; other practical points relate to records management. Both are described below.

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4.2 Records management

There are three “golden rules” for managing deliverables. They are:

1. Make sure that each deliverable is uniquely identifiable.
2. Keep a central log of all project deliverables.
3. Keep a central library of all project deliverables.

4.2.1 Make sure that each deliverable is uniquely identifiable

Each deliverable must include enough information for readers to be able to understand its status. This information must include:

- project name, acronym and number;
- deliverable title (there should **never** be more than one deliverable with the same title, though there can be several revisions (versions) of one deliverable with the same title);
- deliverable number (as given in the Technical Annex to the contract);
- document number (only if it is different from the deliverable number);
- revision or version number;
- date of publication;
- author(s)’ organisation(s) and name(s);
- confidentiality level (public, restricted or confidential).

Note that the above refers to “document number” and “deliverable number”. It is worth understanding that these can be different. The Technical Annex lists all deliverables, but usually it does not identify all documents produced. Consequently, you must allot a number to each document so that it can be controlled, and you must also use the deliverable number for review and progress reporting.

4.2.2 Keep a central log of all project deliverables

Whoever is managing the project must keep a record of all the project’s deliverables. This can be conveniently managed as a simple word processing document or spreadsheet. Make sure that each partner has easy access to this log, either by means of periodic distribution of paper copies, or by network access.

The log must record each time a version or revision of a deliverable is published. Whenever a deliverable is published, write in the log all the unique identifying information listed above.

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4.2.3 Keep a central library of all project deliverables

The same person must keep a copy of each published deliverable. At a minimum, the copy must be on paper. Ideally, a digital version should also be kept. This central library is an important control, to reduce the risk of loss and to resolve disagreements. It is also a valuable resource for the managing the project.

4.3 Document labelling

This section deals with paper deliverables only. Requirements for other media are in section 7.

As described in section 4.2.1, each document must be labelled with unique identifying information. In practice, all the information specified in section 4.2.1 must be on the deliverable's title page and, if there is one, on its cover.

Deliverable covers may also optionally include:

- review status (draft, name of reviewer/approver, date of review/approval);
- number of pages in the deliverable.

Each page of each deliverable must also be uniquely identified (this is important because pages are often photocopied out of context). The minimum information which must be on each page is:

- document number (or other identifier such as document title);
- revision or version number;
- page number.

This guide demonstrates a simple means of including this information in the page header.

Each page can optionally include:

- project acronym;
- total number of pages in the document (especially recommended with loose leaf binding);

These labelling requirements are summarised in the following table.

	Title page	Every page
Project acronym	•	•
Project name	•	
Project number	•	
Document name	•	
Deliverable number	•	
Document number (if different from deliverable)	•	•
Revision or version number	•	•
Date	•	
Author (name, organisation)	•	
Confidentiality level (P/R/C)	•	
Review status	•	
Page number		•
Number of pages	•	•

Key: • essential • optional

Some project teams choose to include a project logo on each page. This can improve the appearance of deliverables, but in some cases (especially if the logo contains a complex graphic) results in slower printing and network access to documents.

Note also that the above is not restrictive. Some project methodologies call for additional information, such as “Document Acceptor” or “location”. Any desired additional information can be added.

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5. Numbering schemes

This guide does not mandate particular numbering schemes. Some choices are presented below as a basis for discussion.

5.1 Document numbering

As explained in section 4.2.1, each document must have a unique number. There are several ways to do this. Examples are shown below.

5.1.1 Sequential numbers

The simplest and most logical method is to allot document numbers which are not meaningful, such as the letter “D” (for “document”) followed by a sequential number:

D001, D002, D003...

or

D0500, D0520, D0540...

This is logical, as it separates numbers from the structure of the project, thus allowing unlimited growth and change. However, it is not “user friendly”; users of documents prefer document numbers which are “meaningful”, that is where the position of a document in the project can be deduced from its number.

5.1.2 Partner numbers

Most methods require numbers to be allotted centrally (by the Project Manager). For some projects this is undesirable. One method which overcomes this is to prefix the document number by an abbreviation of the authoring partner’s name:

ABCO-020, InstEF-030, UCF-0020...

The second part of the document number can be constructed in any way, but avoid an over-complex number.

If you use this method, ensure that all partners use the same scheme for the second part of the number, and ensure that procedures to maintain the central log and library are effective.

5.1.3 Work package numbers

The most “reader-friendly” numbering relates a document to the work package and task which produced it. So, for example, the fourth document from work package 3, task 2 could be:

WP3T2-D04

Unfortunately, this method is also complex. As complexity is likely to cause errors, it is not recommended in this form.

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Note, however, that if the task identifier (WP3T2 in this example) is “translated” to a simple two-digit number (say 08), we can arrive at a simpler number, in this case:

D08-04

5.2 Page numbering

There are two schemes to choose from. Your choice should depend on the length, complexity and volatility of the documents you anticipate.

5.2.1 Simple numbers

With this method, pages are numbered simply starting at one:

1, 2, 3...

This method is the easiest. It is suited to documents which are not too complex, not too long, and not subject to change. It has been chosen for this guide, because if this guide is updated it will be replaced in its entirety.

5.2.2 Compound numbers

With this method, page numbers are prefixed by the section number, and the page number starts at 1 in each new section. So, for example, this page (the 2nd page of section 5) would be numbered:

5-2

This scheme is especially appropriate for loose leaf documents which will receive updates, as it is possible to add and change pages without upsetting the numbering.

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6. How to structure paper deliverables

Badly structured deliverables can cause a lot of problems for a project and for other readers. For example, if they are badly structured, pages can be lost, or information can be difficult to find. There are just two “golden rules” for structuring paper deliverables and other documents:

1. Bind each deliverable.
2. Include all the necessary structural elements in each deliverable.

6.1 Bind each deliverable

Make sure that each document is properly bound. Any kind of binding can be used, but remember that the deliverable may be photocopied, so do not bind it too tightly.

For thin documents, staples can be used (but only for documents which will not be used often, as stapling does not survive much handling). For thicker documents and those which will be referred to frequently, choose a form of binding which allows the reader to open the document easily without breaking the binding.

Generally each deliverable must be bound separately. The only exception is where several short deliverables (less than 5 pages each) are published together; in this case, they can be bound together if desired. When several documents are bound together, the unique identifying data for each document (as specified in section 4.2.1) must be shown on the cover of the collective publication.

6.2 Include all the necessary structural elements

Several “elements” are required in a well-structured document. The elements can include:

- Deliverable Submission Sheet
- Cover
- Title page
- Revision history
- Contents section
- Executive summary
- Project summary
- Introduction
- Method used
- Analysis and/or findings
- Unresolved points
- Conclusions
- Recommendations
- Annexes and/or appendices
- Acknowledgements, references, bibliography
- Glossary of acronyms, technical terms and abbreviations
- Short index
- A page number on every page

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Of course, you do not have to use titles exactly as shown above (eg “Method”, “Conclusions” etc); you can use other titles if you want. The important things are to make sure that all the required content is:

- present;
- clear, of acceptable quality;
- easily found and identified.

The actual elements required in a given deliverable depend on its nature; some are mandatory and others optional. The elements required for some common types of deliverable are described below.

6.2.1 All deliverables

Deliverable Submission Sheet — must be completed and attached to the deliverable. See annex for sample.

Cover: Optional — depends on binding method.

Title page: Mandatory — must show all the data specified in section 4.2.1.

Contents section: Mandatory — must indicate page numbers.

Revision history: Mandatory for deliverables which have been changed (published earlier with a different version number). If included, must show the following for every version published: version number; date published; nature of changes made.

Page numbers on every page: Mandatory — see section 5.2

Executive summary: Strongly recommended if the document is longer than about ten pages of text. Summarises, in no more than a handful of pages, the work done, main findings, conclusions, recommendations (as appropriate) of the deliverable.

Introduction: Recommended for all documents which are longer than about ten pages of text. Explains the background to the deliverable: why it is needed, how it was produced, how it should be used etc. Note that the information in the Introduction is different to the information in the Executive Summary.

Body: Mandatory — the main part of the deliverable, such as description of work, technical information, specifications etc. as appropriate. The body is usually divided into sections, depending on the nature of the deliverable; see, for example, sections 6.2.2 onwards below.

Annexes and/or appendices: Optional.

Acknowledgements, references, bibliography: Optional.

Short index: Recommended for complex and/or lengthy deliverables.

Glossary of acronyms, technical terms and abbreviations: Optional — usually needed only for documents published primarily for use outside the project.

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6.2.2 Technical reports, specifications

Unresolved points: Mandatory — states any technical issues which are undecided at time of publication and which must be resolved, or a statement that there are no unresolved points.

6.2.3 Research or evaluation reports

Description of method used: Mandatory — include survey instruments if applicable.

Analysis and/or findings: Mandatory.

Conclusions: Mandatory.

Recommendations: Mandatory.

6.2.4 Edited Reports

The body of the report must include, as well as the above:

- the *background* to the project: why it is needed, its objectives, what the benefits should be, etc;
- how the project has progressed;
- *results* (findings and conclusions) . Include both contractual deliverables and knowledge gained or actions begun. Be honest about failures as well as successes;
- *dissemination:* how the results will, or may, be publicised and used.

6.2.5 Project reporting documents

Refer to the separate *Guidelines for Project Reporting*, available from your EC Project Officer.

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7. Other media

7.1 Deliverables other than on paper

Do not send deliverables which are program listings, tapes or cartridges unless the EC Project Officer requests them. Instead, inform the EC project officer, in writing, that they are available; and ensure the notification clearly states that it relates to a specific deliverable. See the annex "Deliverables submission sheet" for a sample format.

If you do send any media other than paper to the EC, it must be labelled adequately. Use the following table to decide what information to put on each label.

Mandatory	Optional
Project acronym	Project name
Deliverable reference	Project number
Document ID (only if different from the Deliverable reference)	Document name
Version	Author(s)
Date	
Confidentiality level	

7.2 E-mail

In some circumstances, you may deliver drafts or other documents to the EC Project Officer by e-mail. In this case:

- include the project acronym and document ID in the message title;
- make sure that all the other identifying information (as specified in section 4.2.1) is in the mail message.

7.3 Software deliverables

Some deliverables will be in the form of diskettes, tapes, network locations etc. which contain software. If it is appropriate to send copies to the EC Project Officer and to External Reviewers, follow the guidelines in section 2.3.5.

There are many reasons why a project's software deliverable may not execute correctly on systems outside the project team, for example:

- incompatible hardware (type of computer, monitor driver or CD drive);
- insufficient memory or disk;
- incompatible system software;
- conflict with existing software;

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- damage in transit.

For this reason, the safest assumption is that EC Project Officers and reviewers will not be able to run the software before a review. You should therefore safeguard the interests of your project by sending, along with the software, written deliverables which describe what the software is supposed to do, and how it is supposed to look.

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8. Formatting deliverables

8.1 Design

This guide is not a design guide. It does not attempt to cover the hundreds of rules and conventions which govern good layout and typography. It includes basic advice, and assumes that normal rules and conventions will be adhered to.

8.2 Use of word processor features

Up-to-date versions of word processors have a wealth of sophisticated features which are not always used. The most relevant features are:

- automatic cross-referencing;
- automatic heading numbering;
- automatic numbering of charts, tables and illustrations;
- automatic page numbering;
- inclusion of pictures, tables and charts;
- index generators;
- spelling checkers;
- style sheets;
- table of contents generators.

These features can help you to produce good quality, consistent documents within reasonable timescales. The longer and more complex a document is, the more valuable these features become.

To take an example, it can be simpler to produce a table of contents by hand, just before printing, than to learn how to use the automatic table of contents generation feature. However, deliverable documents are often unexpectedly revised and republished (as described in section 4.1), often with short deadlines. This is when automatic re-generation of a table of contents saves enormous amounts of time. Similarly, automatic cross-referencing (as used earlier in this paragraph in the phrase *described in section 4.1*), combined with automatic paragraph numbering, saves time and ensures accuracy. Therefore, when you are expecting to produce long or complex documents (or to assemble them using contributions from other team members), you are strongly advised to learn about these features. All project team members will benefit if these features are used consistently.

The features described above can all be used by single authors, or by a group of authors working collaboratively. Increasingly, word processors are including “groupware”-like features, such as online circulation of drafts, or revision marks associated with individual authors and reviewers. These advanced features can be extremely helpful in assembling and

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reviewing a deliverable in a multinational project. However, they require that all authors/reviewers use the same software and are confident of its use.

8.3 WWW and HTML

There is an increasing trend to mount worthwhile public deliverables on the Internet, often as WWW documents (“pages”). Typically, deliverables are produced first on paper, then converted to WWW form. The conversion requires the introduction of HTML (HyperText Markup Language) tags into the document.

8.3.1 Do’s and Don’ts

You will keep the conversion work down to a minimum by observing the following rules:

- DO use built-in styles. This will allow the word processor’s tools (eg *Microsoft Internet Assistant*, *WordPerfect for Macintosh 3.5*) to add the HTML tags automatically;
- DO refer to sections (headings) by number or name;
- DO NOT refer to page numbers except in the table of contents;
- AVOID columns and complex layouts;
- DO NOT use formats which rely on specific fonts, line or paragraph spacing;
- AVOID the use of footnotes and endnotes where you have the choice;
- BE AWARE that complex tables are not well catered for in the current widely-accepted versions of HTML;
- BE AWARE that many users of WWW use browsers which are old or which have limited functionality;
- Do check that any non-ASCII characters are represented correctly (see section 9.2.3).

8.3.2 Document Structure

When you convert a paper deliverable into HTML, consider changing the structure of the document slightly. Specifically:

- include key words at the very beginning of the document (because some popular WWW search engines index only words at the beginning of a page). The ideal way to do this is to include an abstract of up to one page at the beginning of the deliverable. In some cases, the Executive Summary is a good basis for an abstract;
- move some of the “control” information (such as revision information) to an annex;
- revise the table of contents so that it links to headings rather than showing page numbers;

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- consider whether to make the deliverable one HTML page, or whether to make each chapter a different page. This is important for long documents. Each has advantages and disadvantages:
 - if the deliverable is one HTML page, it is easy to download, but it is difficult for a user to find out what is in the document without downloading the whole work;
 - if each chapter is one HTML page, it is easy to find out what is in each chapter, but it is difficult to download the whole document.

The ideal solution is to mount two copies, one with the whole document in one page and the other with a chapter per page, giving the user the choice through a simple HTML contents page.

8.3.3 Graphics

Ensure that any illustrations or charts are clear enough to be viewed with a WWW browser on a typical desktop screen. Specifically, small type (less than, say, 10pt) which is clear and legible when printed on a 300dpi may be incomprehensible when viewed on a 72dpi 14-inch diagonal monitor.

8.3.4 Final Checks

Finally, check the appearance of the page(s) you produce using one or more WWW browsers. At a minimum, you should use the most widely used version of the most widely used browser. Ideally, you should also check using the most recent version of the same browser (because it is likely to become the most widespread in the near future), and other browsers and older versions (to make sure that readers with other browsers can read your information).

8.3.5 Other advice

A comprehensive guide on WWW page design can be found at URL
<http://ukoln.bath.ac.uk/caim/>

The EC Esprit programme has produced a page of tips for producing project home pages. It can be found at URL

<http://www.cordis.lu/esprit/src/tips.htm>

Note that the ideas in this page are not mandatory for Libraries projects (for example, inclusion of a formal presentation is not an absolute requirement), but some of the ideas in the page and its resource references may be useful.

8.4 FTP

In some cases it may be preferable to post deliverables on Internet ftp (file transfer protocol) servers. These deliverables could be reports, software, data objects etc. It will often be possible to refer to ftp resources on WWW pages.

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9. Practical points

9.1 Quality

It is in your interest to maximise the quality of your project's deliverables. Both the content and the presentation of deliverables will affect perceptions of the value of your work.

9.1.1 Quality of content

The deliverables encapsulate the work your project carries out. Often they are the only tangible outcome of a project. It is therefore especially important to make sure that the content of written deliverables reaches the highest possible quality level.

The techniques for achieving high quality content are mostly applications of common sense:

- **DO** plan a report before you write it. Starting to write a complex report without a clear plan is rarely successful.
- **DON'T** produce deliverables which are pure formalities, such as reports which are cursory or which contribute no new knowledge. Make sure the deliverable contains worthwhile, new information.
- **DO** think about your audience. Keep the technical content appropriate for the level of the intended readership. Where technical details are unavoidable, explain them as much as necessary.
- **DO** explain things clearly and gradually.
- **AVOID** stilted, over-formal language. Write simply.
- **DON'T** write a deliverable in a rush just before a deadline. Plan the time you will need to write and/or assemble and edit contributions, check it and have it reviewed.
- **DO** make sure that the report is read and reviewed by suitable individuals. Ideally, you should arrange a formal review process which includes a technical review (by someone with a deep technical understanding of the subject) and, especially for public deliverables, a second person who has had little or no involvement with the project.
- **DON'T** produce deliverables which are too long. Length is not a virtue. Plan to include only what is needed, and plan to take advantage of the review process to cut superfluous sections and words.

9.1.2 Quality of presentation

Although it is the intellectual content of a deliverable which really matters, reviewers and other readers are inevitably influenced by other aspects such as format, consistency and language. Use all possible tools and techniques to produce high quality. These are:

- care over the physical appearance as well as over the contents;

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- checking for consistent style, punctuation and correct cross references;
- proof reading by someone who has not written any part of the report;
- standards governing production of deliverables;
- word processor tools, such as spell checking and grammar checking;
- formal quality assurance procedures (including application of the checklists in the annex);
- translations into English produced or checked by native English speakers;
- final editing performed by native speakers of the language in which the deliverable is written.

9.2 E-mail

9.2.1 Within the team

Your project will run much more smoothly with e-mail. Every team member who deals with staff from other partners' organisations should have access to e-mail. E-mail can be used for routine communications (exchanges of ideas, asking and replying to questions, updating colleagues with work) and also for sending documents and files within the consortium.

You should agree how e-mail will be used. Concerning deliverables, your team needs to agree standards such as:

- can final deliverables be delivered by e-mail?
- are acknowledgements required?
- will any special encoding schemes be used for e-mail?
- will e-mail logs or other records be kept?

9.2.2 Corresponding with the Project Officer

Project Officers generally welcome communication by e-mail. However, do not send a deliverable by e-mail without prior agreement.

9.2.3 Character sets

If you send files which contain non-ASCII characters through e-mail as messages, you may experience problems. This arises because e-mail systems generally are configured to deal with special characters for one language or country only. As an example, the word *cinémathèque* can end up as *cin.math...que* (this is a real example, taken from a WWW page dealing with international library issues)

Consequently, you must bear this limitation in mind when files are exchanged electronically. This can happen:

- in simple e-mail messages;

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- when sending documents by e-mail for review;
- when sending documents onward for translation into WWW HTML pages.

The kinds of characters which cause problems include:

- accented characters (such as ç, ï, ñ);
- characters which are not in the Latin character set (such as ß, ø);
- special characters (such as £, ™, ©);
- fractions (such as ¾);
- mathematical symbols and formulae (such as Σ, α, ≅);
- open and close quotation marks (‘ ’ “ ”).

Generally, the problems disappear if the file is sent as a properly-encoded form such as a MIME attachment (rather than as a message). The best course of action is to establish at the beginning of a project, by testing, method(s) which are agreeable to all partners. Do not wait until just before deliverable deadlines to discover e-mail problems; establish and test e-mail practices in good time.

The diskette enclosed with this guide includes files you can use as part of your tests.

9.3 Fax

Do not send deliverables by fax.

9.4 Language

At the beginning of the project, agree which language(s) can be used for documents which are to remain within the project team.

Deliverables can be produced in any EU language. In practice, English is commonly used, and is strongly recommended for any deliverables which are to be published. You can, of course, publish deliverables locally in any language, especially where they are for local surveys, courses etc; but you should also allow for translation into English, to maximise the Europe-wide impact, if wider publication is planned.

9.5 Graphics

Deliverables can contain as many or as few graphics (pictures, charts) as necessary. When incorporating a graphic, remember that pages from published deliverables will often be photocopied. You must therefore choose patterns, backgrounds and colours which can be photocopied clearly, and without losing their meaning. For example:

- if the graphic uses text on a coloured background, choose a background colour which will contrast with the text when copied;

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- if a graph uses colour coding, choose different patterns for each colour so that a photocopy will still be meaningful.

9.6 Colour and shading

There is often a temptation to use colours or shading (patterned fills) to improve the appearance of deliverables. The golden rule is to select colours or shadings so that black-and-white photocopies will still be clearly legible. Bear in mind that although you may print the deliverable in colour, most readers will use a black-and-white photocopier if they need a copy. Problems arise with:

- small or fine fonts on dark shaded backgrounds;
- lack of contrast between colours when they are photocopied.

Bear in mind that most photocopiers use green light. So in general, photocopying colours makes:

- light green and yellow appear as white or light grey on the copies;
- dark red and brown appear as nearly black on the copies.

You should therefore:

- make sure that any shaded background is light;
- make sure that any coloured background/coloured text combination has adequate contrast after copying.

9.7 Intellectual Property

9.7.1 Observing the rights of others

You should never publish anything which you do not have the right to publish. In general, this should not present any problem for RTD projects, as they will only publish (ie include in deliverables) either materials generated within the consortium, or data for which rights have been agreed (eg scanned images of a collection owned by a museum).

Note that this is consistent with the advice in the Appendix “Things not to include in deliverables” that materials previously published elsewhere should not be included in deliverables.

9.8 Abbreviations and Acronyms

Whenever a deliverable is to be circulated outside the project team, you should make sure that all technical abbreviations and acronyms are spelled out. If there are only a few, then they can be spelled out at the first occurrence; otherwise a separate section or annex is appropriate. You may find the list of European Library Abbreviations at URL <http://www.echo.lu/libraries/en/acronym.html> is a helpful reference.

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Annex 1: Checklists

This annex contains checklists you can use to verify that deliverables follow the advice in this guide. Use of these checklists is optional; the project manager should decide how they will be used. Completed checklists should *not* be sent to the Commission.

To use these checklists, take photocopies (or print fresh copies from the diskette) before filling them in.

When completing the checklist, tick one box — *Yes*, *No* or *Not Applicable* — for each question. Where a point is mandatory (eg unique document name must be unique) the option *Not Applicable* is not possible.

You should end up *without any* ticks in the *No* column. If there are *any* ticks in the *No* column, then you need to take corrective action.

If there are any ticks in the *Not Applicable* column, it may be necessary to explain them by means of a brief comment. The need for this depends on the way in which the checklists are used, and on how formally the project operates.

Two blank checklists are included at the end to allow you to create your own project-specific checklists. One contains tick boxes, the other does not. The version with tick boxes can be used with a word processor, or with hand-written questions. The version without tick boxes can be used with hand-written questions if the spacing of the tick boxes is unsuitable.

Separate word processor files containing the checklists are on the diskette; they can be used to make customised checklists for your project.

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Project _____ Deliverable _____

Completed by _____ Date _____

Checklist 1: Records Management – Paper deliverables

	YES	NO	N/A
Does the title page of the deliverable contain the ...			
1. ... project name?	<input type="checkbox"/>	<input type="checkbox"/>	
2. ... project acronym?	<input type="checkbox"/>	<input type="checkbox"/>	
3. ... project number?	<input type="checkbox"/>	<input type="checkbox"/>	
4. ... deliverable title?	<input type="checkbox"/>	<input type="checkbox"/>	
5. ... deliverable number?	<input type="checkbox"/>	<input type="checkbox"/>	
6. ... document number (if different to deliverable number)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. ... revision or version number?	<input type="checkbox"/>	<input type="checkbox"/>	
8. ... date of publication?	<input type="checkbox"/>	<input type="checkbox"/>	
9. ... author(s)' organisation(s) and name(s)?	<input type="checkbox"/>	<input type="checkbox"/>	
10. ... confidentiality level (public, restricted or confidential)?	<input type="checkbox"/>	<input type="checkbox"/>	
11. Is the deliverable title unique?	<input type="checkbox"/>	<input type="checkbox"/>	
12. Is the deliverable number unique?	<input type="checkbox"/>	<input type="checkbox"/>	
13. Has the deliverable been recorded in the project log?	<input type="checkbox"/>	<input type="checkbox"/>	
14. Has a copy been deposited in the project library?	<input type="checkbox"/>	<input type="checkbox"/>	
15. Is the title page information also on the cover?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Does every page show ...			
13. ... document number	<input type="checkbox"/>	<input type="checkbox"/>	
14. ... revision or version number?	<input type="checkbox"/>	<input type="checkbox"/>	
15. ... page number?	<input type="checkbox"/>	<input type="checkbox"/>	
16. Is the page number simple enough to be usable?	<input type="checkbox"/>	<input type="checkbox"/>	

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Project _____ Deliverable _____

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Checklist 2: Records Management – Non-paper deliverables

	YES	NO	N/A
Does the deliverable show the ...			
1. ... project name?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. ... project acronym?	<input type="checkbox"/>	<input type="checkbox"/>	
3. ... project number?	<input type="checkbox"/>	<input type="checkbox"/>	
4. ... deliverable title?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. ... deliverable number?	<input type="checkbox"/>	<input type="checkbox"/>	
6. ... document number (if different to deliverable number)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. ... revision or version number?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. ... date of publication?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. ... author(s)' organisation(s) and name(s)?	<input type="checkbox"/>	<input type="checkbox"/>	
10. ... confidentiality level (public, restricted or confidential)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Is the deliverable title unique?	<input type="checkbox"/>	<input type="checkbox"/>	
12. Is the deliverable number unique?	<input type="checkbox"/>	<input type="checkbox"/>	
13. Has the deliverable been recorded in the project log?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Has a copy been deposited in the project library?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Project _____ Deliverable _____

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Checklist 3: Paper deliverable structure

	YES	NO	N/A
1. Is the deliverable adequately bound?	<input type="checkbox"/>	<input type="checkbox"/>	
2. Is there a title page? (see checklist 1 for title page information)	<input type="checkbox"/>	<input type="checkbox"/>	
3. Is there a revision history?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Is there a contents section?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Does the contents section indicate page numbers?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Is there an executive summary?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Does the executive summary contain a concise explanation of the deliverable's contents and conclusions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Is there a brief project summary?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Is there an introduction?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Does the introduction explain the background to the deliverable and how it was produced?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Is there a statement of points not yet resolved?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Is there an explanation of the method used?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Is there an analysis and/or findings section?			
14. Are the analysis and/or findings clear?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Is there a conclusions section?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Does the conclusions section clearly explain conclusions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Is there a recommendations section?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Does the recommendations section list the recommendations and state them clearly?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. If the deliverable is for publication and if it contains a lot of jargon, is there a glossary?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. If the deliverable is long or complex, is there an index?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Project _____ Deliverable _____

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Checklist 4: Software deliverables to send to the Commission

	YES	NO	N/A
1. Is the deliverable on standard floppy disk(s) or CD-ROM(s)?	<input type="checkbox"/>	<input type="checkbox"/>	
2. Will the software execute on a normal desktop PC with Microsoft Windows, a CD-ROM drive, and without any further hardware or software?	<input type="checkbox"/>	<input type="checkbox"/>	
3. Is the deliverable self-contained (ie does it contain all the software and data objects required to run)?	<input type="checkbox"/>	<input type="checkbox"/>	
4. Is there documentation explaining how to install the software?	<input type="checkbox"/>	<input type="checkbox"/>	
5. Does the documentation state software prerequisites?	<input type="checkbox"/>	<input type="checkbox"/>	
6. Does the documentation state hardware prerequisites?	<input type="checkbox"/>	<input type="checkbox"/>	
7. Is there documentation explaining how to run the software?	<input type="checkbox"/>	<input type="checkbox"/>	
8. Is the deliverable properly labelled (see checklist 2)?	<input type="checkbox"/>	<input type="checkbox"/>	
9. Is there a paper description of the software explaining how it should work and how it appears?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Checklist 5: Paper deliverables — quality

	YES	NO	N/A
1. Is the quality of the contents good?	<input type="checkbox"/>	<input type="checkbox"/>	
2. Is the quality of writing acceptable?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Is the translation, if any, acceptable?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Has spelling been checked?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Has consistency been checked?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Are headings correctly numbered?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Are charts, tables and illustrations correctly numbered?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Is the table of contents accurate?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Are cross references accurate?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Does the physical appearance of the document adhere to project standards?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. If WWW publication is likely, does the deliverable layout permit straightforward conversion to HTML (see section 8.3 of the Deliverables Guide)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. If colour is used, have the colours been chosen to allow photocopying in black and white?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. If colour is used in charts, have different patterns been used to allow photocopying in black and white?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. If materials originating outside the project are included, does the team have the right to publish them?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Checklist __: _____

	YES	NO	N/A
1.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Checklist __: _____

YES NO N/A

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Annex 2: Templates

A DOS diskette is enclosed with this guide. The full contents are described in the annex titled "The d-Guide Diskette".

It includes templates (for Microsoft Word) and styles (for WordPerfect) which can be used to create deliverables which comply with the recommendations in this guide. These word processors are chosen because they are the most widespread. However, you are not limited to these products, you are free to use any word processor when preparing deliverables..

This annex describes the templates/styles (referred to below as templates, for simplicity). Detailed instructions for their installation and use are on the diskette.

What are the templates?

Templates are "skeleton" documents which contain all the formatting information to allow you to produce deliverables, which follow the recommendations in this guide. This guide has itself been produced with the templates, so it shows you how your documents will appear if you adopt the templates for your project.

Use of these templates is optional. You are free to modify the templates, to use completely different templates, or to use none at all. However, in a multi-partner, multi-country project the advantages of using an agreed template are many.

The templates have been tested with Microsoft Word for Windows 2, Microsoft Word 6 (Windows and Macintosh) and WordPerfect 5.1 and 6.1 for Windows. These were chosen to represent the most commonly-used software versions. It is likely that they could be used with other versions, but this has not been tested. They use default names for styles (eg *Heading 1*) wherever possible. This will make later conversion to HTML, using automated tools, easier.

The templates have been designed to be simple. They can be used with minimal instruction, by anyone who has a basic knowledge of the word processor. However, more advanced knowledge is required to install them or to modify them

The following illustration shows what a deliverable page produced with the templates looks like. Key points are annotated, and these points are then described.

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1 About this manual ◀

1.1 Why do we need a Quality Manual? ◀

"Good projects produce good deliverables " ◀

This quotation is one basis for producing a quality manual. This document is for all members of the project team. It contains mandatory project standards for project quality control. There is advice on: ◀

- quality standards; ◀
- the review process; ◀
- other procedures and tools for maintaining quality.

This manual has been produced using the quality plan.

1.2 What are the main quality issues?

The main issues are:

1. completeness; ◀
2. correctness.

These are described in more detail below.

1.2.1 Completeness ◀

Completeness matters. In the context of RTD projects, there is little point in producing incomplete

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- ① This is the header block. It should appear at the top of every page (with a few exceptions such as the cover and title page).

The header block consists of a table with four columns and two rows. One column is empty and has no borders. The remaining three columns contain the text. The upper row contains the headings (PAGE etc), the bottom contains the variable information (eg 1.0). The page number is generated automatically. This design has been chosen to allow you to modify it easily; for example, you can easily add an extra column (by using the blank column) if you wish to include the project acronym in the header block.

There are two forms of the header block, to allow for deliverables printed on both sides of the paper (*recto-verso*). For odd-numbered pages the header prints on the right (as in the illustration); for even numbered-pages it prints on the left. Make sure that documents are correctly assembled before binding. Alternatives are:

- print on one side only; in this case, delete the even header and make even and odd headers the same;
- print on both sides, but use only one header block, to make it simpler to assemble the document.

- ② The style *Quotation text* can be used to emphasise a quotation or other extract, as shown here. Use this sparingly.

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- ③ The style *Heading 1* is used for the top level headings. This is printed in font *Arial*, size 14 point, bold, and set to print with less indentation than *Text* for visibility. The heading is numbered automatically (where the word processor permits), and it automatically starts a new page.
- ④ The style *Heading 2* produces second level headings. It appears the same as *Heading 1*, but in 12 point. The heading automatically moves to a new page if necessary to avoid being at the bottom of a page without following text.
- ⑤ The style *Heading 3* produces third level headings. It is similar to *Heading 2*, but in *Times New Roman* 12 point bold.
- ⑥ The text which makes up the body of the deliverable. This uses the style *Text*, with the font *Times New Roman* in 12 point size, and 3 points spacing before and after.
- ⑦ Bullet points are created with the style *Bullet*. This has attributes identical to *Text* except for the indentation and the bullet symbol; the symbol is inserted automatically by Word 6 but has to be inserted manually with Word for Windows 2.
- ⑧ Numbered points should be used sparingly, only when the numbering is significant. The numbering is generated automatically (where the word processor permits). The style is *Bullet, numbered* and is identical to *Bullet* save for the numbering.

Other styles which are not shown in the illustration are:

- *Acronym*: use to compile a list of abbreviations and acronyms.
- *Checklist entry*: use to insert a line on a checklist.
- *Checklist header 1, 2 & 3*: use these styles if modifying the top of checklists.
- *Contents*: Similar in appearance to *Heading 1*, but without numbering. Intended for use to head a table of contents.

The table of contents is produced automatically showing the first two levels of headings.

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Annex 3: Things not to include in deliverables

Not all the products of projects should be sent to the Commission. In particular, some products, defined as deliverables in the Technical Annex, are not directly helpful to the Commission in determining the progress of a project, so should not normally be sent.

Do not send the following to the Commission, either as deliverables or accompanying deliverables (*unless* you have explicitly agreed otherwise with the EC Project Officer):

- program code listings;
- lengthy pseudocode listings;
- file or database printouts;
- large volumes of record or database layouts, object definitions etc.;
- lengthy code lists;
- lengthy vocabularies or thesauri;
- market survey data listing responses for every questionnaire;
- programs which require hardware or software other than a stand-alone desktop PC with CD-ROM drive;
- any magnetic or optical media other than diskette, CD-ROM, VHS cassette and audiocassette.

Instead of sending these, if they constitute formal deliverables, inform the EC project officer, in writing, that the deliverable is complete. The format shown in the annex "Deliverables submission sheet" can be used as a model.

Of course, the above is a guideline only. Special cases may call for some of the above to be sent as deliverables on occasion. If in doubt, refer to your EC Project Officer.

Additionally, materials which have not been produced by the project team should normally not be sent as deliverables, and should not be incorporated into deliverables. These materials may include:

- vendors' product brochures;
- vendors' product manuals;
- published standards;
- any other document published or readily available from elsewhere.

Deliverables can include extracts from the above. So, for example, a two-hundred page vocabulary should not be sent, but an illustrative extract of a few pages can be included in a deliverable report.

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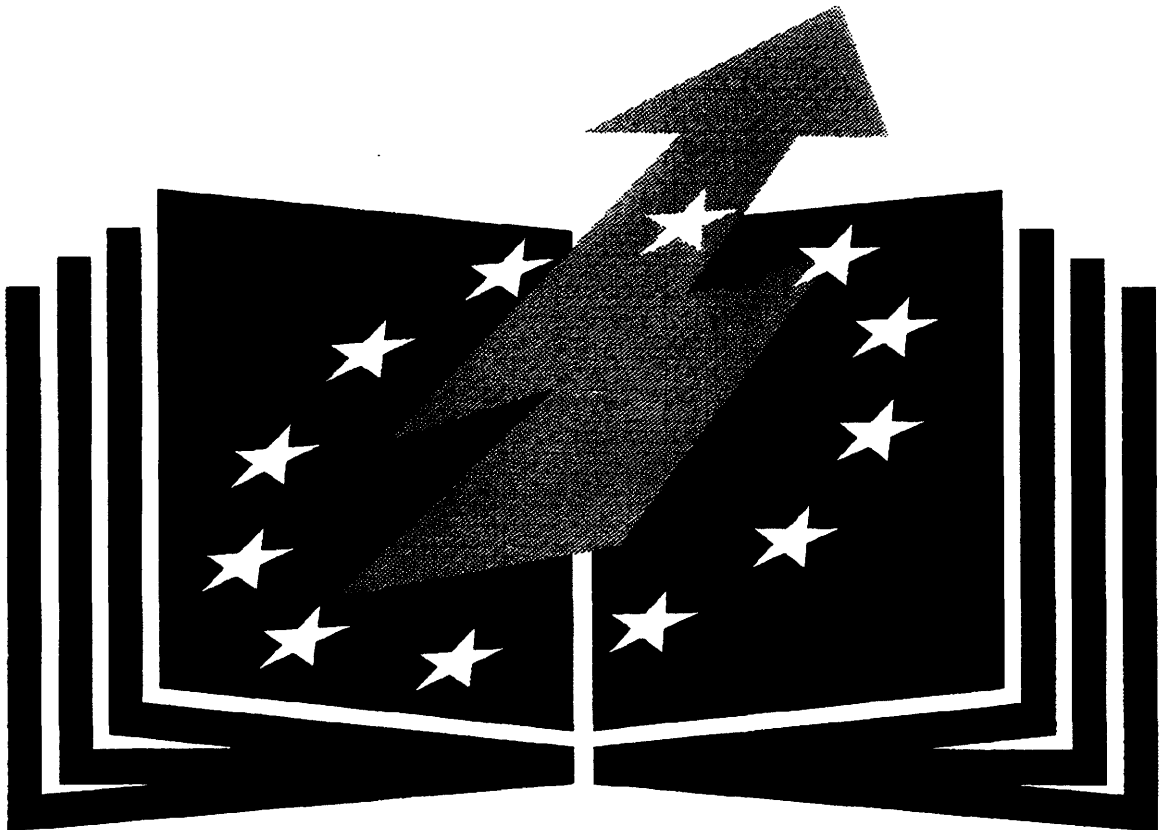
Annex 4: Logos

The diskette enclosed with this guide contains eight logo files. The logos in the files are shown in this appendix.



file: logopt.tif

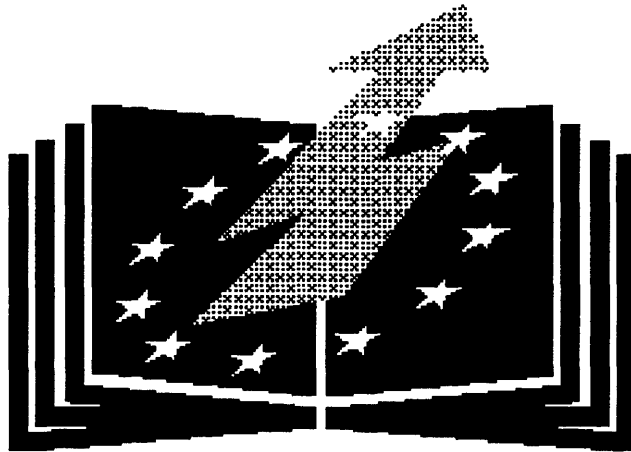
Libraries logo, monochrome, small



file: logogr.tif

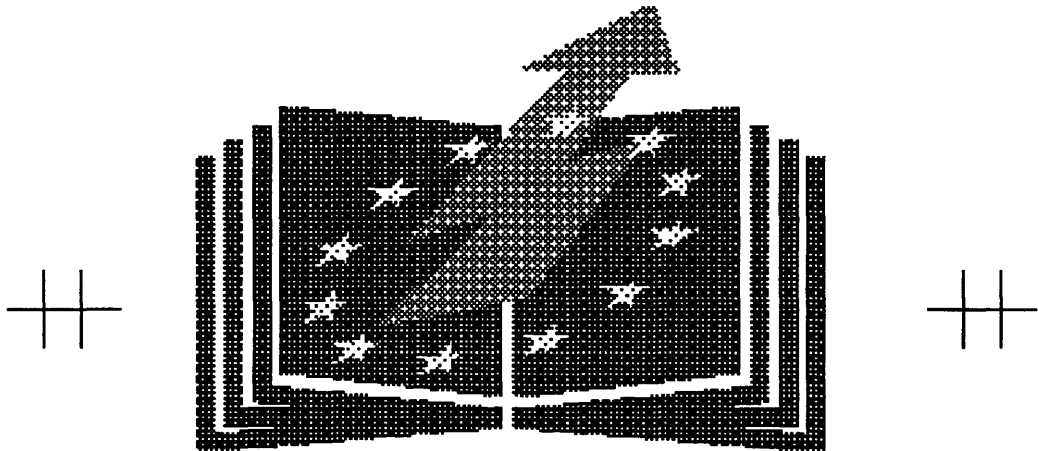
Libraries logo, monochrome, large

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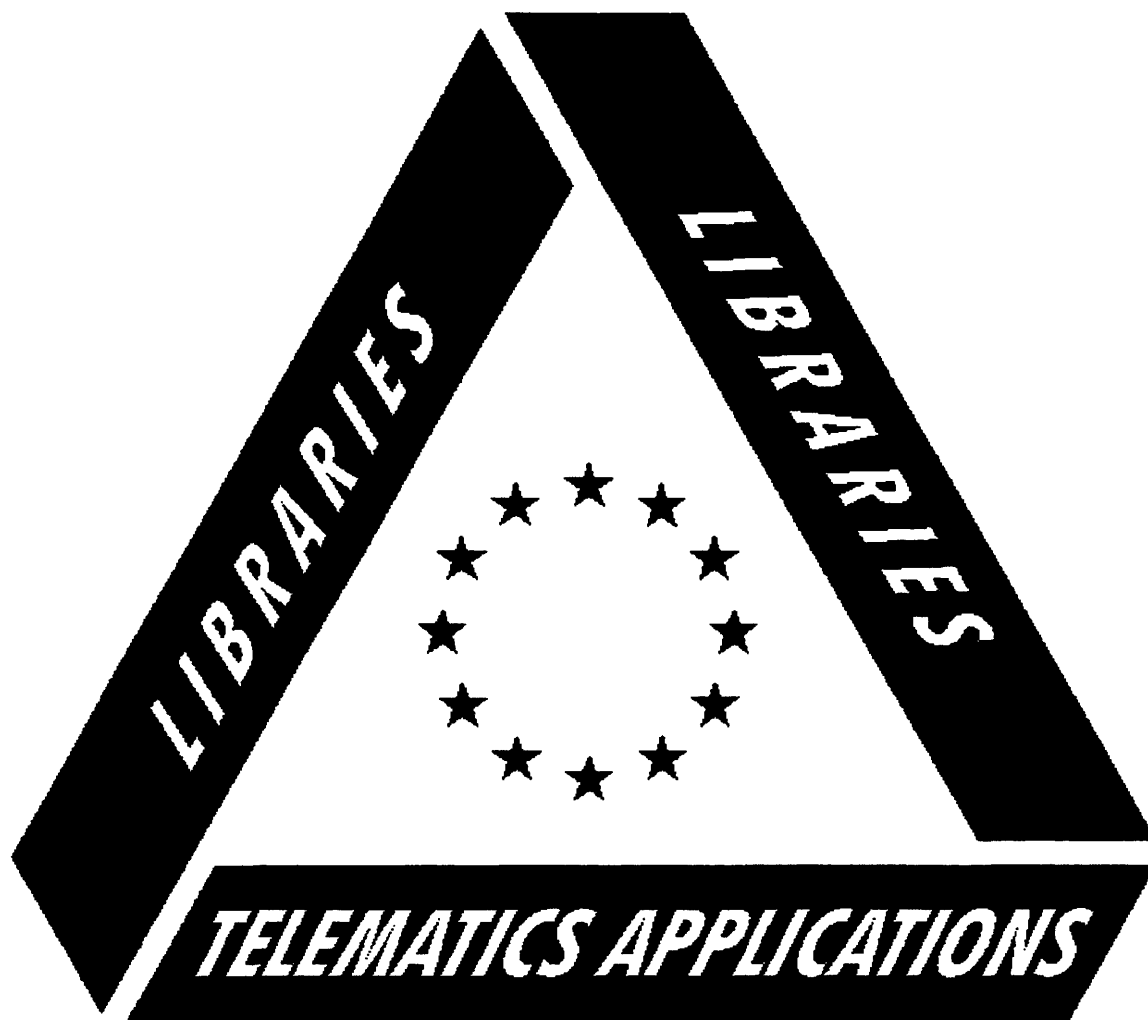
file: pellico0.eps

Libraries logo, postscript format, small



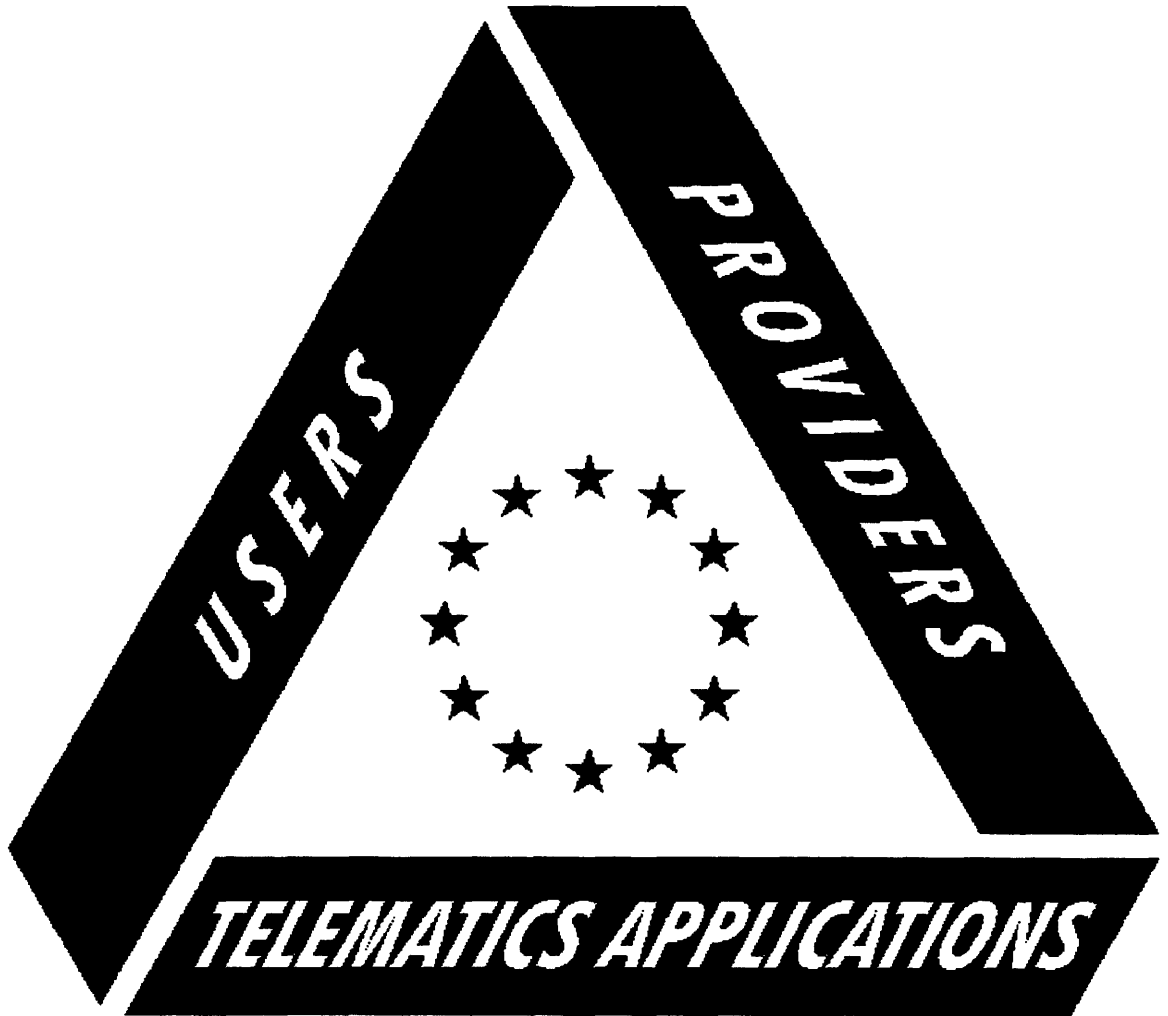
file: pellico1.eps

Libraries logo with registration marks, postscript format, small



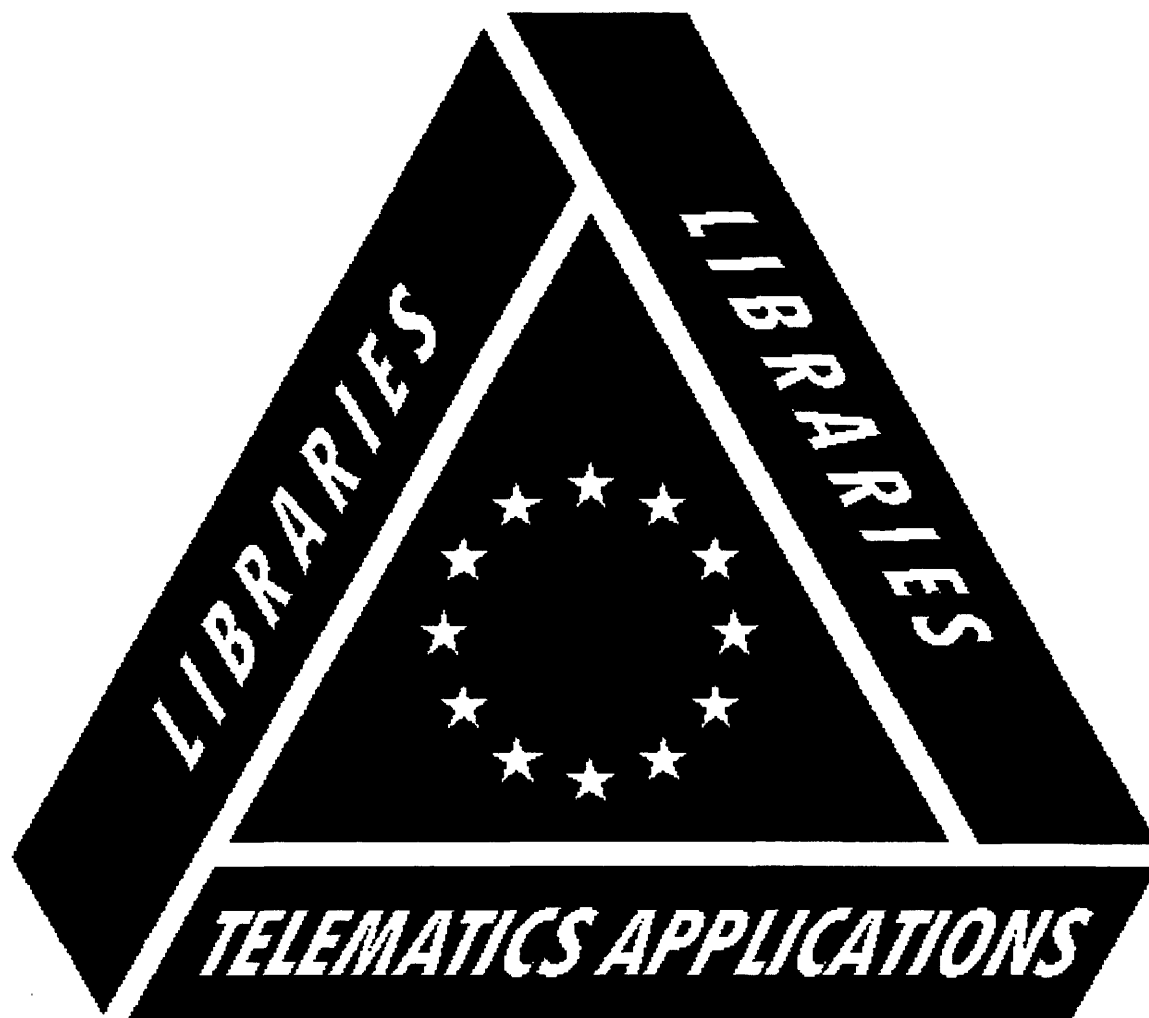
file: bw-lib.bmp

Telematics Applications Programme logo, monochrome, Libraries version



file: bw-prov.bmp

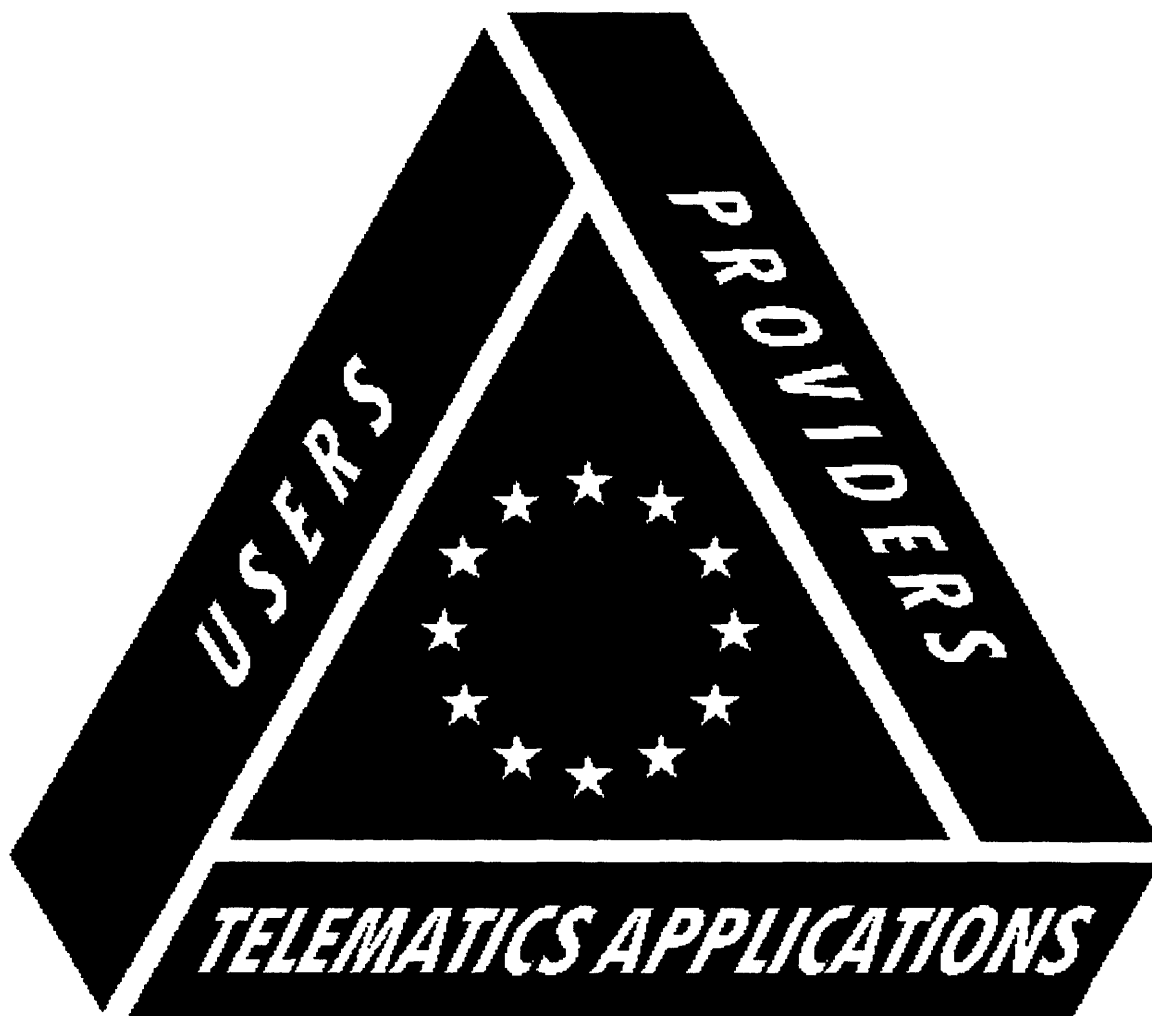
Telematics Applications Programme logo, monochrome, general version



file: tap-lib.bmp

Telematics Applications Programme logo, colour, Libraries version
(shown here in monochrome)

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file: tap-prov.bmp

Telematics Applications Programme logo, colour, general version
(shown here in monochrome)

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Annex 5: Obtaining further copies of this guide

To obtain further copies, send a request to

European Commission
DG XIII-E-4, Electronic Publishing and Libraries
L-2920 Luxembourg

Fax: +44 352 4301 33530

E-mail *Libraries@lux.dg13.cec.be*

The guide and templates are also available as Microsoft Word documents on the WWW at
URL *<http://www.echo.lu/libraries/en/deliv-guide.html>*

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Annex 6: The d-Guide Diskette

This annex describes the contents of the diskette which accompanies this guide. This information is also contained in the README files on the diskette. It is designed to be usable with Windows and Macintosh systems.

The diskette is in MS-DOS format. Its contains:

READ_1ST.TXT late information. Please read this first, before using the diskette.

/TEMPLATE/ templates and style sheets which can be used to create deliverables which comply with the recommendations in the Deliverables Guide.

/CHECKLST/ checklists you can use to test the quality of deliverables.

/LOGOS/ various Telematics logos.

/SPECCHAR/ test files containing special characters, for testing e-mail encoding and decoding.

/SUBMIT/ submission form for all deliverables.

/TEMPLATE/

This directory contains templates for Microsoft Word and WordPerfect which can be used to create deliverables which comply with the suggestions in the Deliverables Guide.

The templates have been tested with Microsoft Word for Windows 2, Microsoft Word 6 (Windows 3.x and Macintosh) and WordPerfect 5.2 and 6.1 for Windows. These were chosen to represent the most commonly-used word processing software. It is likely that they could be used with other versions, but this has not been tested.

The use of these templates and style sheets is optional. The files in the TEMPLATE directory are shown in the following table:

	Files in directory /template/		
	Microsoft Word 6	Microsoft Word for Windows 2	WordPerfect
Template for cover or title page	/mw6/ pt-cover.dot	/wfw/ pt-cover.dot	/wp/pt-cover.tpl
Template for contents page	/mw6/ pt-cont.dot	/wfw/ pt-cont.dot	/wp/pt-cont.tpl
Template for body of report	/mw6/ pt-body.dot	/wfw/ pt-body.dot	/wp/pt-body.tpl
Template for body of report	/mw6/ pt-rept.dot	/wfw/ pt-rept.dot	/wp/pt-rept.tpl
Instructions for installing and using the above	/mw6/instr.doc	/wfw/instr.doc	/wp/instr.wp5

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/CHECKLST/

This directory contains checklists you can use to test the quality of deliverables, in Microsoft Word and WordPerfect formats.

The checklists are in Microsoft Word for Windows 2 and WordPerfect 5.x formats.

To economise on disk space, the checklists are all stored in one file per format:

Checklist	Microsoft Word	WordPerfect
1: Records Management — Paper deliverables	chklst.doc	chklst.wp5
2: Records Management — Paper deliverables		
3: Paper deliverable structure		
4: Software deliverables		
5: Paper deliverables — quality		
Blank checklist, tick boxes		
Blank checklist, no tick boxes		

/LOGOS/

This directory contains logo files. The logos are shown in the annex "Logos".

Description of logo	File
Libraries logo, monochrome, small.	logopt.tif
Libraries logo, monochrome, large.	logogr.tif
Libraries logo, postscript format, small.	pellico0.eps
Libraries logo with registration marks, postscript format, small.	pellico1.eps
Telematics Applications Programme logo, monochrome, Libraries version.	bw-lib.bmp
Telematics Applications Programme logo, monochrome, general version.	bw-prov.bmp
Telematics Applications Programme logo, colour, Libraries version.	tap-lib.bmp
Telematics Applications Programme logo, colour, general version.	tap-prov.bmp

/SPECCHAR/

This directory contains small test files which can be used to test e-mail encoding and decoding procedures. The files are:

	Microsoft Word 6	WordPerfect 5.x
Special characters file	specchar.doc	specchar.wp5

/SUBMIT/

This directory contains a submission sheet which can be used to notify the EC Project Officer that a deliverable is completed:

	Microsoft Word 6	WordPerfect 5.x
Submission sheet	submit.doc	submit.wp5

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Annex 7: Deliverables submission sheet

This annex contains a submission sheet which you should use to inform your EC Project Officer that you have completed deliverables. The deliverables can be conventional paper documents, network publications (eg WWW pages), events (eg accomplishments, conferences), data, software, etc.

To use this sheet:

1. Copy the submission sheet, either by photocopying the page overleaf or by printing a fresh copy from the diskette which accompanies this guide.
2. Enter the following: EC Project Officer's name, Project name, Project acronym, Project number, Person sending the form, Organisation to which the person belongs, Date, Deliverable name, Deliverable number.
3. Tick one or more of the boxes in the vertical column in the middle of the form. It should always be possible to tick at least one box:
 - if the deliverable is a network publication, tick the box "It is available for your inspection";
 - if you cannot tick a box, then you may need to write a descriptive or explanatory document which clarifies the deliverable.
4. Tick one of the boxes which defines the nature of the deliverable. If you are submitting a paper deliverable which is also available as a network publication, tick the "on paper" box and mention the network publication (with its URL) in the comments section at the foot of the form.
5. If you are sending a paper document, enter the document's.
6. If you are sending a non-paper deliverable, complete the Date, Version, Author, Number of pages and status box entries as appropriate.
7. For non-paper deliverables attach descriptive literature (eg summary of seminar, description of test results) wherever possible.
8. Send the sheet, and accompanying literature, to the EC Project Officer.

DELIVERABLE SUBMISSION SHEET

To:

(Project Officer)

.....
EUROPEAN COMMISSION
Directorate General XIII/E-4
EUFO 1275
Rue Alcide de Gasperi
L-2920 Luxembourg

From: Project name:

Project acronym:

Project number:

Person:

Organisation

Date

The following deliverable:

Deliverable name:

Deliverable number:

- is now complete. It is available for your inspection.
 A copy can be sent to you on request.
 Relevant descriptive documents are attached.
 2 bound, 1 unbound copies herewith (public deliverables).
 2 copies herewith (other deliverables).

*Tick all that
apply*

The deliverable is: on paper on WWW (url:)
 an event software other (.....) (tick one)

For all paper deliverables, and other deliverables as appropriate:

Date:

Version:

Author:

No. of pages:

Status: Public Restricted Confidential (tick one)

Commission use only

Keywords:

Description:

Comments