

Guidance on editing chapters and providing material to tri.x

This guide is designed to help you prepare your material for submitting to tri.x for inclusion in your Procedures Manual.

The dates for your delivery will be agreed with you well in advance and it is critical that your material is handed over to us in the correct format by the due date. A slot in our Production Schedule is secured for you once the delivery is booked; where material does not arrive in time, this slot will be released. When this happens, your tri.x consultant will agree revised timescales with you, but this may result in several weeks delay, depending on the next available slots in our schedule.

Requirements for providing amendments to existing chapters

Where you wish to provide amendments to existing* chapters from your manual this must be done on Microsoft Word copies of the chapters (see [Copying the Procedures into Word for editing](#)).

The following requirements apply:

1. All edits **MUST** be done using the 'Track Changes' feature in Word – *any edited material sent to us without the changes showing in this way will be returned to you.*
2. You must only edit copies of your 'live' online Procedures Manual (for updates) – *don't send us edits on copies you have taken previously and stored, or the 'original' documents you gave us before we turned them into web-enabled procedures.*
3. Where several people have edited the same chapter, please make sure you only send us **ONE** copy of the chapter back with ALL the changes required – *the person who is managing this process for your organisation will need to coordinate this and manage any conflicting edits.*
4. Chapters must be copied and pasted into MS Word in their entirety – *Even if there the chapter requires a minor change in one section the whole chapter should be copied in order that the tri.x consultant can review the whole chapter in relation to any changes and write instructions to our formatting team.*
5. Only send us edited chapters once – *if you aren't sure whether you have already sent us a chapter, please check with us rather than send it again. Where we receive multiple copies of the same chapter, changes will not be processed.*
6. Each chapter should be saved as an individual document, multiple chapters should not be saved as one document.
7. Do NOT send us documents using the 'Comments' facility in Word (like post-its) to generate questions to your colleagues, or to tri.x.
8. Do NOT send us documents using different coloured text to show your changes, instead of 'Tracked Changes'.
9. Filenames of Word documents should describe to tri.x the content of the document e.g. 'Multi Agency Guidance on Threshold Criteria' rather than 'Multi Agency Guidance' or 'DMTVer2'

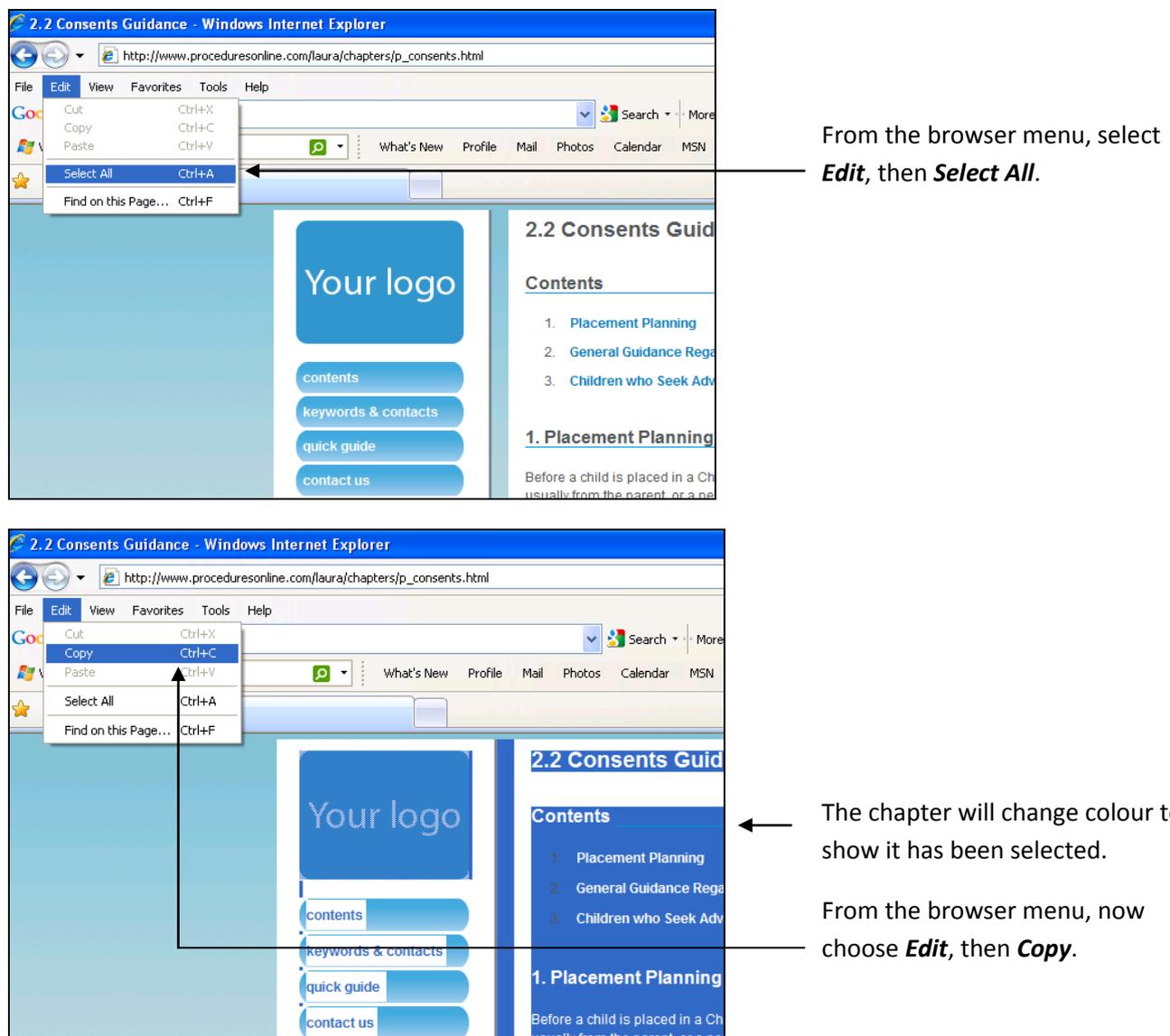
10. To change team or service names, job titles or other terminology please do not make amendments in individual chapters. Just tell us as part of the update information you send and we will do it for you
11. Do not insert or 'embed' multiple documents into one Word document to send as an attachment; each document should be sent as an individual attachment to the email you send us. You may attach several files to one email.

Where any of the above requirements have not been met, the material will be returned to you for rectifying which may result in those changes being held over until the next planned update.

*Where we provide you with new 'draft' chapters for editing, these will already be in Word format.

Copying the Procedures into Word for editing:

In order to do this, you need to have the chapter you want to edit on the screen and:



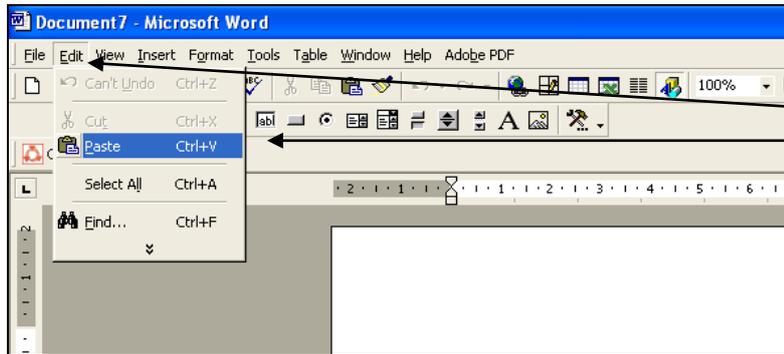
From the browser menu, select **Edit**, then **Select All**.

The chapter will change colour to show it has been selected.

From the browser menu, now choose **Edit**, then **Copy**.

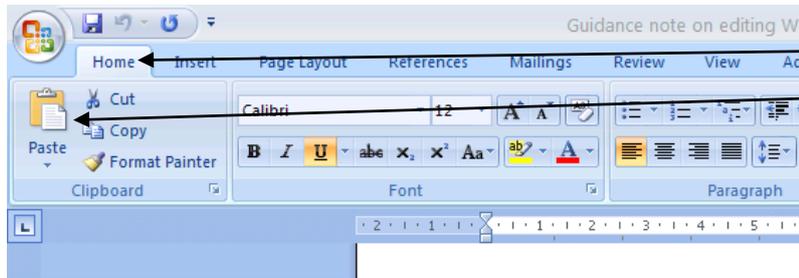
Now you need to open a new Word document, to paste the text into the page.

If you are using Word 97-2003, your screen will look like this and you need to do the following:



From the menu, choose **Edit**, then **Paste**.

If you are using a later version of Word, your screen will look like this and you need to do the following:



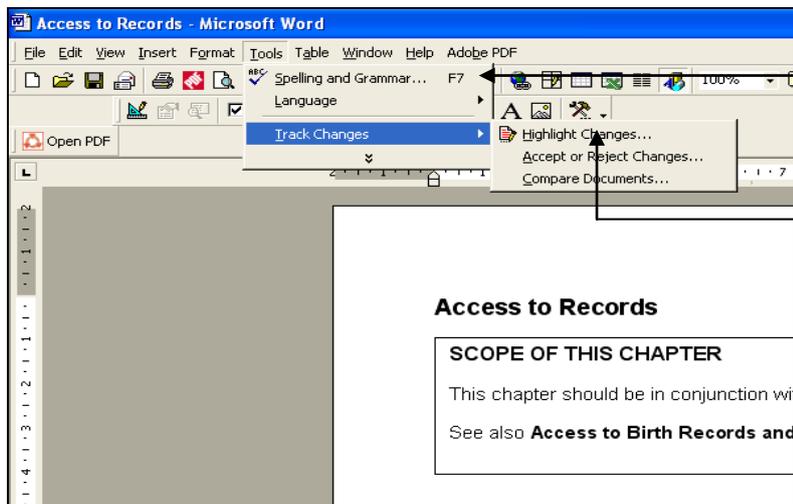
From the 'Home' tab in Word, choose **Paste**.

Once the text has been pasted onto the page, SAVE the document to your computer or network in the usual way.

You are now ready to begin editing BUT before you do this, you **MUST** turn on the 'Track Changes' feature.

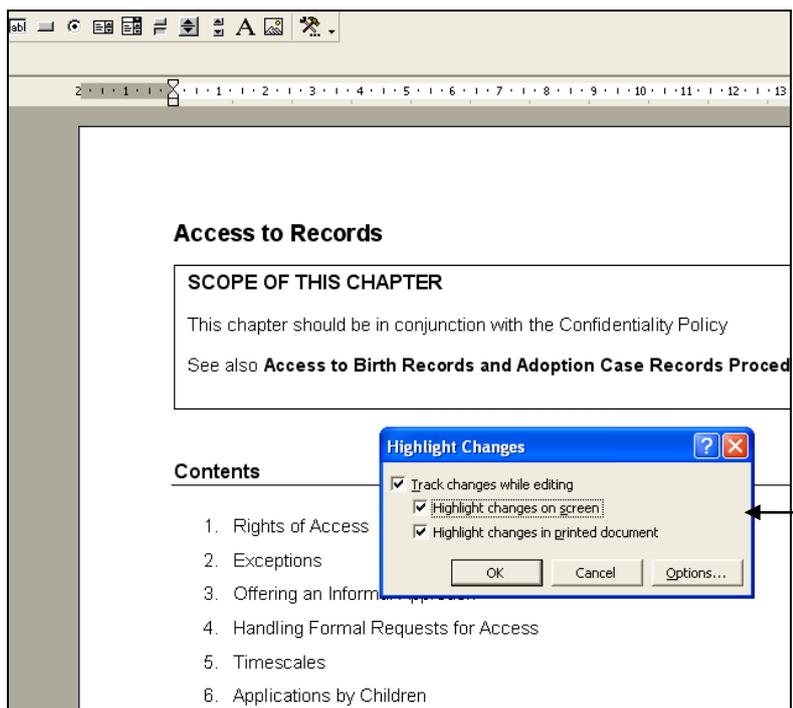
How you do this will depend on which version of Word you are using, as the menu layout is slightly different.

If you are using Word 97-2003, your screen will look like this and you need to do the following:



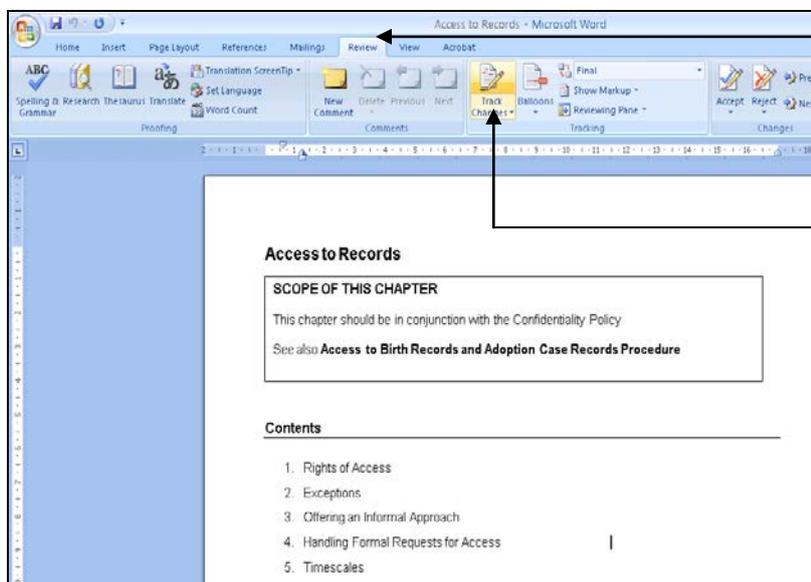
From the menu, choose **TOOLS**, then choose **Track Changes**.

A further menu will appear to the side; click on **Highlight Changes**.



This 'dialogue box' will appear – tick each of the boxes then click on **OK**.

If you are using a later version of Word, your screen will look like this and you need to do the following:



From the menu at across the top, choose the **Review** tab.

If Track Changes is already switched on, the icon will be highlighted like this.

If it isn't switched on, it will look like this:



Clicking on this icon 'toggles' Track Changes on and off. When it is highlighted, it is on.

You are now ready to begin editing the document.

If you aren't used to using Track Changes, don't worry about how messy it looks – it provides us with the necessary information. If several people edit a document you may see different font colours and initials – this is normal.

Using chapters or documents from other customers' manuals or other sources

Often, customers want to use a procedure they have found in another tri.x customer's manual online. Where this is the case we will seek permission from the customer for you to use it – customers rarely refuse to share their material in this way. However, it is imperative that you do so rather than just copy it into Word and send it to us as a new document; there may be issues around the intellectual property, or ownership of such content.

Similarly, where you provide material to us for inclusion, we will assume that you own the Intellectual Property Rights (IPR) or, where you do not own the Intellectual Property Rights (IPR), we will assume that you have the necessary permission to do so.