



Corridor Program

Congestion Relief & Bus Rapid Transit Projects

ENVIRONMENTAL DOCUMENT TEMPLATE PROCEDURES

*Prepared for WSDOT
Project Teams and
Document Authors
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SECTION 1 WHAT ARE THE TEMPLATE PROCEDURES AND HOW DO THEY WORK?

In this chapter, we describe the reasons why the Reader-Friendly templates were created and outline their basic structure. We show you how you can quickly find easy-to-use resources to make the process of writing WSDOT environmental documents more efficient.

Why did we develop the template procedures?

Anyone that has recently been involved in WSDOT projects has heard about the Reader-Friendly concept. Over the past couple of years, WSDOT has promoted its *Reader-Friendly Document Toolkit* so that project documents will contain simpler language, more graphics, and a visually-pleasing layout.

More recently, we have developed several “templates” to make the process of writing and formatting environmental documents easier and more consistent overall. Templates are preformatted documents that contain built-in styles and formatting features. Built-in styles include fonts, page and paragraph settings, chapter and page numbering, and many other specialized settings.

The purpose of the templates and procedures described in this document is to provide a detailed method for implementing the Reader-Friendly concept. These templates and procedures simply enhance the *WSDOT Reader-Friendly Toolkit*.

As we developed the template and procedures, we kept the following important factors in mind:

- We will use Microsoft Word (MS Word) to create the documents. While MS Word is a great text processing application, it is limited in its capabilities to process graphics, and is especially problematic when a document is passed back and forth between multiple users. Our goal is to find ways to eliminate as many factors as possible that create problems.

“The environmental documents we’ve been producing were written for professional EIS readers and attorneys and not for decision makers and the public. We need to change this and create documents that can successfully meet the needs of all of these important audiences.”

--Reader-Friendly Document Toolkit (pg 2-2).

- Our objective is to create a tool that allows our document authors to spend more of their time on analysis and less time on document processing tasks.
- We want to take advantage of existing computer and networking technology as much as possible.
- Procedures and templates must be easy to use and incur as little additional cost as possible for everyone involved.

How will document development change?

As we considered the objectives, we identified some key areas where improvement was possible and focused our attention there. The major areas where document development will change are introduced below. By maximizing use of available computer technology and adopting consistent procedures, we are able to create Reader-Friendly documents in a more trouble-free environment.

User Information Setup in MS Word

In order for documents to meet project standards, authors and editors will need to modify their MS Word user settings for the WSDOT project they are working on. Authors and editors need to review *Appendix E* for details about how to change their user settings to meet the project standards.

Track Changes

The Track Changes feature in MS Word can be very useful for determining who made revisions in a document, and when those revisions were made. The Track Changes feature will be turned on in the master documents so each user's revisions will be recorded in every version. Revisions will not accumulate from one version to the next. Each new version will show *only* the changes that were made in that version. Should it become necessary to review prior changes, these past versions with all Track Changes will be available to the Project Editor.

Preset Styles

The environmental document template is set up in MS Word 2003 to use specific formatting choices for text, headings, tables, captions, numbered lists, bullets, and sidebars. When you need to apply a different format to any part of the document, you will choose the appropriate formatting from preset styles. See *Appendix A* and *Appendix F* for details.

Master Glossary and Acronym List

The WSDOT Project Team has developed a master glossary and acronym list, which will be provided to document authors, editors, and reviewers. Authors will use these master lists for their environmental documents so that definitions and acronyms are consistent.

Graphics Processing

On prior projects, document authors transferred their graphics using one of the following techniques: (a) embedding graphics into the MS Word document, and/or (b) providing their maps and other graphics in PDF format, which could not be inserted into a MS Word document. The method involving how graphics are included in environmental documents will change significantly. See *Exhibit 2-1 Requirements and Roles for Creating Graphics* for details about graphic sizes and formats.

For Discipline Reports

Instead of embedding graphics or including them as a separate PDF, graphics will now be linked to documents. When the graphics are linked, the MS Word document is smaller in size (making the document more manageable). Linking also allows for changes to be made easily to the graphics, after which the link can be updated so the new graphic displays properly in the MS Word document. (Previously, old graphics had to be deleted and new ones re-inserted.) Please note that for each project, the EA Manager will notify authors about when and how source file graphics are to be delivered. See *Appendix F* for details about how to work with the project documents.

For Technical Memoranda

Tech memo authors may continue to embed graphics in their reports. However, tech memo authors are required to submit all graphic source files to the EA Manager. For each project, the EA Manager will notify authors about when and how source file graphics are to be delivered.

For other types of environmental documents

Other NEPA documents, such as environmental assessments, supplements, biological assessments and permit documents will be processed as determined on a project-by-project basis. The Environmental Document Template Procedures will be

updated as procedures for developing these other documents are established.

Standard Folder and File Naming Conventions

These template procedures require that project folders and files are named following standard naming conventions.

Discipline reports will be named using the following naming convention:

[ProjectName]_[Discipline]_[Type of report]_[version]

Example: TRIP_TRA_DR_v2-3.doc

Tech memo authors should name their documents following the above example just as closely as possible. The three constant rules that apply to file naming are (1) no spaces; (2) no periods; and (3) keep the file name short.

See *Where do I find the master document and templates?* in Section 2 and *Exhibit 2-2: Graphics File Naming Conventions*.

What is required of document authors to implement the template procedures?

Document authors will need to take some preliminary steps in order to take advantage of the new template procedures. A list of requirements follows:

Exhibit 1-1: Document Author Requirements

Requirement	Description
Video card in computer: minimum 256 mg video ram	This minimum requirement is set so that a user's display will show the level of detail needed to work on the documents and graphics.
ESRI's ArcGIS software ESRI's DS Map Book Developer Sample	This software is required to use the GIS map templates. This software is not available through the remote access login. The document author will need the capability to open templates and GIS data from the latest ESRI release of the software.
MS Office 2003 including MS Word 2003	For compatibility with WSDOT Project Team.
Check MS Word User Parameters	This requirement is set so that every document author's settings comply with WSDOT project standards. See <i>Appendix E</i> for details.

Exhibit 1-1: Document Author Requirements

Requirement	Description
Confirm that project folders are named properly	This requirement is set so the document and graphics files will be in a consistent location for graphic linking purposes. Because the links will need to be re-established each time the document is transferred between the author and the WSDOT Project Team, this task is much easier if the folder names are the same at both locations.
Confirm that files are named properly	This requirement is set so the document and graphics files will not have to be renamed when transferred between the author and the WSDOT Project Team. For graphic linking purposes, it is necessary that the file names remain the same at both locations.
Identify Document Author's advanced MS Word User/Editor	This requirement is described in the scope of work and in the QA/QC Plan. Due to the complexity of linking graphics and formatting the discipline report master document, document authors will find the assistance of an Editor and/or advanced MS Word user necessary.
QA/QC Plan Participation	Document authors are required to be familiar with the project QA/QC Plan. A complete copy of the QA/QC Plan will be provided to project participants at the beginning of each project. A PDF version of the QA/QC Plan is available upon request.
Provide all graphic source files upon request of EA Manager	Document authors are responsible for providing all source files for graphics, charts, photographs, renderings, etc. The WSDOT Project Team expects to receive these source files as they are completed or upon the request of the EA Manager.
Acquire and provide all appendices for environmental document(s)	Document authors are responsible for acquiring all the appendices they plan to attach to their environmental document, and transmitting those appendices to the Project Editor.

What is required of the WSDOT Project Team to implement the template procedures?

The WSDOT Project Team is responsible for providing document authors with a scope of work and with the tools necessary to complete that work. Under the new template procedures, the WSDOT Project Team will provide document authors and reviewers with the components listed below:

Exhibit 1-2: WSDOT Project Team Requirements

Requirement	Description
Master Document for each Discipline Report	The project editor will create a master document for each discipline report. Document authors will work in that master document to build their discipline report.
Templates and Color Palette	Templates for sidebars, tables, photographs, and charts, will be available for copying/pasting into the document. The WSDOT Project Team will also provide map figure templates and GIS data. The color palette created specifically for Reader-Friendly documents will be included with these templates.
"How To" Procedures and Naming Conventions Lists	For any new procedure required, detailed instructions about how to implement that procedure will be provided. It is necessary that environmental documents and graphics files are named consistently. Lists with accepted naming conventions for documents and graphics files will be provided.

SECTION 2 HOW DO I USE TEMPLATES?

In this section, we present brief, straightforward information about using the document templates and preformatted data including tables, charts and other graphic elements. Together, these tools can simplify the process of writing and organizing WSDOT environmental documents, and make them more consistent. Appendix A shows how the environmental document will look when the templates are used properly. Detailed instructions about using the templates are found in Appendix B, C, and D.

What templates and resources are available and how are they organized?

In this section, we outline the benefits and procedures for using the following templates and resources:

- The master document template for discipline reports;
- Graphic templates;
- Map Figure Geographical Information System (GIS) templates and layouts; and
- Document text.

Templates

Templates are documents that contain built-in styles and formatting features.

What do I need to know before I begin working in the document?

- Set your MS Word user parameters so that your selections comply with WSDOT project standards. See *Exhibit E* for details.
- Read *Appendices A* through *E* so you have a basic understanding of how the templates are set up.
- At your firm, establish where the templates, your document, and all related graphics will reside. It is important that you use the folder names provided by the WSDOT Project Team. These folders can be placed as subfolders within your firm's standard project files.

Where do I find the master document and the templates?

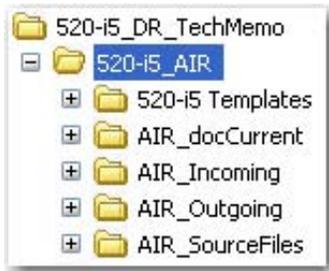
Master Document

A master document contains predetermined topics that each document author must write about in order to meet regulatory requirements.

The WSDOT Project Team will provide a project folder complete with subfolders that contain all the components you need to develop your report. The EA manager will notify you when the project folder is ready to be downloaded. The project folder and subfolders are to be copied onto your firm's computer system *exactly* as they are sent. *It is imperative that the folders and files are not renamed or modified in any way.*

The project folder will contain a **Templates** subfolder with all necessary templates, a **SourceFiles** subfolder where all graphics related to the report will reside, and a **docCurrent** folder where the MS Word version of the environmental document will reside. In addition, **Incoming** and **Outgoing** working folders are included.

Specifics about each subfolder follow.



This view shows the 520-i5 project Air Quality document folders as an example.

Templates Subfolder

This folder contains all the templates that should be used to build environmental documents. Templates have been set up for sidebars, tables, photographs, maps, and Excel charts. The color palette for graphics is also included here. Minimum formatting standards for technical memoranda are also in this folder, along with a Master Glossary and Master Acronym List.

SourceFiles Subfolder

Source files are all types of graphic files that are included in the environmental document such as photographs, Excel charts, sketches, renderings, illustrations, and maps. Document authors will be required to provide the source files in their original format (see *Exhibit 2-1 Requirements and Roles for Creating Graphics* for details about graphic sizes and formats). Document authors will place the source files for the document in this folder.

docCurrent Subfolder

This folder should contain the most recent MS Word version of the environmental document. For discipline reports, this folder is where the master document will reside. Technical memos should also reside in this folder. Note that tech memos are not required to follow a specific format, except for

the project standards shown in *Appendix E*. Minimum guidelines for developing a tech memo are included in the **Templates** subfolder.

Incoming Folder

This folder is provided as a working folder. The **Incoming** folder is where the QC comment forms should reside as it is being worked on by authors. Authors can also use this folder for files that will be used or included in the discipline report.

Outgoing Folder

This folder is also provided as a working folder primarily to hold any files that will be uploaded to another location. Any files that users need to copy for their use outside of the project folders should be placed here.

How do I begin writing a report using the master document template?

As we discussed in Section 1, templates are documents that contain built-in styles and formatting features. The templates developed for environmental documents have been copied and made into master documents. A master document contains predetermined topics that each document author must write about in order to meet regulatory requirements.

To begin writing a report, you will open the master document file in the **docCurrent** subfolder (i.e., the MS Word document titled *ECOS_DR_v1.1.doc*). Once the file has been opened, you can begin inserting or copy/pasting text and other components for your report. Specific formatting to be used within the document is preset and automatically available to you. See *Appendix F* for information about working with the document template.

What about styles?

Styles are an MS Word feature that make formatting more efficient. In this template, we have preset these styles. See *Appendix A* for a visual display of styles and where they should be used in your document. See *Appendix F* for details about styles.

What about headers, footers, and page numbering?

Since you will be working in a master document, the headers, footers, and page numbering will be preset for you.

Document authors will need to modify the headers and footers for their specific discipline. (See *Appendix A* for example of how each of these features will appear in the document.) See *Appendix F* for more information about headers, footers, and page numbering.

How do I create a Glossary and Acronym list?

We have compiled master Acronym and Glossary templates in MS Word for ease in referencing many of the common terms used in these documents. These templates are located in the **Templates** folder. By opening these files and using the **Copy** and **Paste** feature, you can quickly build your Glossary and Acronym List.

Why is it important to add references when material is pulled from other resources?

While writing environmental documents, particularly discipline reports, data from one report may also apply to other reports. For example, the Ecosystems Discipline Report may contain data that are also relevant to Water Quality.

When copy/pasting data from another report into your document, a footnote will need to be inserted. The footnote should contain reference information about the source you are copying from. Noting the source of the borrowed text is extremely important so the information can be appropriately referenced and back checked. Providing ALL SOURCES of information is critical to the editing and review process.

See *Appendix F* for details about copy/pasting text from other documents and for citation/reference formatting guidelines.

How do I write the Summary section of the document?

According to the Reader-Friendly Toolkit, the Summary section is the most important part of EIS/EA and discipline report documents. Discipline report authors are encouraged to not only clearly and concisely state the key differences and similarities between alternatives, but to write their Summary sections in a way that will help the EIS/EA authors. An EIS/EA author should be able to use the Summary section from a properly written discipline report with little or no editing.

For discipline reports, document authors are encouraged to reword and truly summarize the results of their findings, rather than cutting and pasting text from other sections of

discipline reports. By writing original text, fewer corrections will be made to the Summary section because something changed in another section of the report.

What about the Table of Contents?

An automatic Table of Contents has been included in the master document for the major categories and chapters. As the document author completes the writing process, the Table of Contents must be updated to reflect additions, changes, and new page numbers. See *Appendix F* for instructions on how to update a Table of Contents.

What graphic templates are available and how can I use them?

Visual examples and detailed procedures for using each type of graphic template are described in *Appendices A through D*.

Photo, Sidebar, Table, and Map Figure Templates

In addition to the master documents, you can access several MS Word files (located in the **Templates** folder) to add graphic elements. By opening these files and using the **Copy** and **Paste** feature, you can quickly add the features you need (See *Appendix B* for detailed instructions). These individual MS Word files are saved as templates and include the following:

- Photo
- Sidebar
- Table
- Map Figures (GIS data will be inserted into an MS Word Map Figure template. See *Appendix D* for detailed instructions.)

Chart Templates

For the purpose of customizing color and black and white charts as visual aids to be included in MS Word documents, you may access preset chart templates from an Excel Workbook. The Excel chart template contains many chart examples and options, as well as the color palette for assigning color or black and white attributes. The Excel file can be found in the **Templates** folder (See *Appendix D* for detailed instructions). The chart template includes the following types:

- Area Chart

- Bar Chart
- Column Chart
- Line Chart
- Pie Chart

What is the color palette and how do I use it?

A color palette consists of predetermined colors available for use in a particular document. The colors available with the Environmental Document template have been preset for charts in Excel. Map colors vary slightly and have been preset in ArcMap. In Reader-Friendly documents, use of color should be limited to charts and other graphic components that can best be represented in color. When color is not a necessary component, black and white is recommended. Complete color and black and white palettes are provided in *Appendix C*, together with their respective RGB (Red, Green, Blue) values. Users can select these preset fill colors directly from the Drawing Toolbar in MS Word or Excel.

What GIS templates are available and how can I use them?

A variety of GIS map templates have been created to accommodate different project limits, shapes, and boundaries. Project Environmental Managers (PEMs) will need to choose the most appropriate GIS template(s) for their project and work with the WSDOT Project Team to customize and refine their map template(s) before distribution. For more information about the official GIS protocols see the *GIS Data Management Plan* located in the *Project Management Plan* document.

ArcMap templates

ArcMap templates contain data layers and a predefined layout that arranges map elements, such as a North arrow, data frame, legend, and scale bars.

A variety of GIS templates are available for use in environmental documents. Examples of these layouts are shown in *Appendix D* and are referred to as Map Figure templates. The Map Figure templates include map book, full page, and partial page templates.

A map book template uses ESRI's *DS Map Book* developer's sample.

Map Book Templates

A map book template creates a successional series of maps from project start to project end. These templates have closer zooms of the project, allowing authors to add more detail than some of the other ArcGIS templates. Maps generated by a map book template use a full page in MS Word and do not sit alongside text.

The available map book templates are:

Portrait

- Legend bottom (see *Exhibit D-2*)
- Legend right (see *Exhibit D-1*)

Landscape – requires GEC approval

Partial Page Templates

Using a partial page template allows authors to create maps for display alongside or within the body of text in the document. These maps usually sit on the same page as the text that is describing them. They are broken down into two categories:

Sidebar

- North-South (N-S) “skinny” (See *Exhibits D-3 and D-4*)
- Sidebar “half-skinny” (see *Exhibits D-5 and D-6*)

Body of Text

- East-West (E-W) “horizontal skinny” (see *Exhibit D-7*)
- Body “half-skinny” (see *Exhibit D-8*)
- Box (see *Exhibit D-9*)

Full Page Templates

Full page templates are variations of the “skinny” maps with room for additional data frames. Maps created by using this type of template do not sit alongside text and use a full page in MS Word. Full page “skinny” templates are great for adding data frames to “zoom-in” along the project as well as relating other exhibits (photos and graphs) to the map. The available Full Page Templates are:

- I-405 vicinity map (see *Exhibit D-10*)
- “Skinny” with zoom-in (see *Exhibits D-11 and D-12*)

GIS Styles

GIS styles are a collection of predefined colors, symbols, properties of symbols, fonts, and map elements that reflect the WSDOT Project Team standards. The WSDOT Project Team will distribute the GIS styles to individuals identified by the EA Manager (usually to each firm's GIS staff). The GIS styles must be installed for GIS staff, document authors, and editors *before* opening any GIS template.

GIS base data

GIS base data are the background data displayed within ArcMap templates. GIS base data includes, but are not limited to, aerial photography, streets, municipality boundaries, parks, trails, lakes, streams, wetlands, and map annotation.

How do I create my graphics?

Graphics within Reader-Friendly documents include **Exhibits** and **Non-Exhibits**. Together, these elements include maps, figures, sketches and renderings, Excel-based charts, photos, text boxes, and tables. They are identified and used differently within a document as follows:

Exhibits

An **Exhibit** is any graphic element that will be labeled within the document with a name and number (i.e., Exhibit 2-1). Some examples include: a map created in GIS, a graphic (figure) saved in EMF or JPG format, a chart created in Excel, or an MS Word table.

Non-Exhibits

Non-Exhibits include photos and text boxes. They are graphic elements, but they need not be labeled with an exhibit name and number for identification purposes.

Exhibit 2-1 below shows the required criteria, along with the document author's and editor's role with respect to handling each type of graphic element.

Exhibit 2-1: Requirements and Roles for Creating Graphics

	Required Format	Required Size	Required Resolution	Document Author Role	Document Author Firm's Editor Role
Figure	EMF	Varies	N/A	Document author and his/her GIS staff creates the Figure at the document author's firm using EMF template; saves each Figure in the SourceFiles folder as an EMF file using naming conventions. After the Figure is linked by the Editor, the document author uploads the EMF file per the EA Manager's instructions.	Editor links source EMF file to document where document author has indicated.
Map	EMF	Varies	300 dpi minimum; 600 dpi with imagery	Document author and his/her GIS staff creates GIS Map at the document author's firm using WSDOT GIS templates; saves each map in the SourceFiles folder as an EMF file using naming conventions. After the Map is linked by the Editor, the document author uploads the EMF file per the EA Manager's instructions. (See <i>Appendix D</i> for export example.)	Editor links source EMF file to document where document author has indicated.
Chart	Excel	Varies	N/A	Document author creates Chart using Excel spreadsheet template located in the Templates folder; saves each chart in the SourceFiles folder as an XLS file using the naming conventions. After the Chart is linked by the Editor, the document author uploads the XLS file per the EA Manager's instructions.	Editor links chart to document (possibly adjusts formatting) where document author has indicated.
Photo	JPG	2.0" wide	150 dpi minimum; prefer 300 dpi	Document author creates Photo is JPG format; saves the JPG in the SourceFiles folder using naming conventions. After the Photo is linked by the Editor, the document author uploads the JPG file per the EA Manager's instructions.	Editor links photo to document where document author has indicated.
Sidebar	MS Word	2.0 wide"	N/A	Document author copies and pastes sidebar text box from MS Word template into the document; writes text; applies Sidebar style to text.	No further action needed.
Table	MS Word	4.25" wide	N/A	Document author copies and pastes table from MS Word template into the document; writes text.	No further action needed.

How do I name graphic source files?

Source files for graphics must be named according to the following conventions. The list below includes examples of reports and how graphics would be named.

Please note that because some discipline analyses will be combined into one report, additional names will be added and distributed to document authors on a per project basis. For example, if Land Use Patterns and LUPP are combined into a document titled *Land Use Discipline Report*, the naming convention might be P_LU_#.#.JPG.

Exhibit 2-2: Graphics File Naming Conventions

Discipline	Photo	Exhibit (a) (b)
Air Quality	P_AIR_#.#.JPG	E_AIR_#.#.EMF
Cumulative Effects Analysis	P_CEA_#.#.JPG	E_CEA_#.#.EMF
Economic Elements	P_ECON_#.#.JPG	E_ECON_#.#.EMF
Ecosystems (combined DR that includes Fish/Aquatics, Wetlands, and Wildlife/Vegetation)	P_ECOS_#.#.JPG	E_ECOS_#.#.EMF
Energy	P_ENE_#.#.JPG	E_ENE_#.#.EMF
Environmental Justice/Fairness	P_EJF_#.#.JPG	E_EJF_#.#.EMF
Fish and Aquatic Resources	P_FISH_#.#.JPG	E_FISH_#.#.EMF
Geology, Soils and Groundwater	P_GEO_#.#.JPG	E_GEO_#.#.EMF
Hazardous Materials	P_HAZ_#.#.JPG	E_HAZ_#.#.EMF
Cultural Resources Survey Report	P_CULT_#.#.JPG	E_CULT_#.#.EMF
Land Use (combined DR that includes Land Use Patterns and Land Use Plans and Policies)	P_LU_#.#.JPG	P_LU_#.#.EMF
Land Use Plans and Policies	P_LUPP_#.#.JPG	E_LUPP_#.#.EMF
Land Use Patterns	P_LPAT_#.#.JPG	E_LPAT_#.#.EMF
Noise	P_NOI_#.#.JPG	E_NOI_#.#.EMF
Public Services	P_PUB_#.#.JPG	E_PUB_#.#.EMF

Exhibit 2-2: Graphics File Naming Conventions

Discipline	Photo	Exhibit (a) (b)
Section 4(f)	P_S4F_#-#.JPG	E_S4F_#-#.EMF
Social Elements	P_SOC_#-#.JPG	E_SOC_#-#.EMF
Surface Water and Floodplains	P_SWF_#-#.JPG	E_SWF_#-#.EMF
Transportation	P_TRA_#-#.JPG	E_TRA_#-#.EMF
Utilities	P_UTIL_#-#.JPG	E_UTIL_#-#.EMF
Visual Quality	P_VO_#-#.JPG	E_VO_#-#.EMF
Water Quality	P_WQ_#-#.JPG	E_WQ_#-#.EMF
Water Resources (combined DR that includes Surface Water and Floodplains and Water Quality)	P_WTR_#-#.JPG	E_WTR_#-#.EMF
Wetlands	P_WET_#-#.JPG	E_WET_#-#.EMF
Wildlife and Vegetation	P_WILD_#-#.JPG	E_WILD_#-#.EMF

(a) *If an Exhibit is comprised of multiple sheets (pages), name each sheet source file accordingly. Example: E_ENE_#-#_Sheet1.EMF.*

(b) *Chart files will have the extension XLS.*

Linking graphics in a discipline report

As discussed in Section 1, discipline report graphics will now be linked vs. being embedded. The new procedure is being adopted for two main reasons: (1) the environmental document size will be much smaller because it doesn't contain all the graphics; and (2) linking ensures that the WSDOT Project Team receives the source files as they are created.

Who links the graphics?

Once the discipline report (MS Word document) and the graphic source files have been created, the document author firm's editor will link the graphics before they are submitted to the WSDOT Project Team. When the discipline report and graphics are received by the WSDOT Project Team, the links will be updated and the document will be prepared for review.

Why are folder names so important?

In order for this process to go as smoothly as possible, it is necessary that the document author's firm use the folder structure and file naming conventions contained in these template procedures. Once the document and graphics files are transferred to the WSDOT Project Team, the files will be placed in folders named exactly the same (as they are at the document author's firm) and the links will be updated. After the graphics files have been transferred to the WSDOT Project Team the first time, they should not be transferred again unless they have been revised. This then allows for the document author and the WSDOT Project Team to transfer only the MS Word document back and forth, and simply update the links to the graphics.

Where to I find more information about working with graphics?

See *Appendices B through D* and *Appendix F* for more information about working with graphics. Please note that these template procedures do not include step-by-step instructions for how to link graphics. Each document author firm's editor should be familiar with this MS Word feature.

SECTION 3 WHO DO I CONTACT WITH PROBLEMS OR IF I NEED MORE INFORMATION?

The following contact list is provided for any issues relating to the procedures included in this document. All other project-related questions and concerns should be directed to the Project Environmental Manager, the EA Manager, and/or the Project Editor.

Type of Issue	Contact Name
Templates, master documents, and workflow procedures	Susan Patterson Lead Technical Editor I-405 Project Team 600 108th Ave NE, Bellevue WA 98004 425-456-8599 susan.patterson@i405.wsdot.wa.gov
Environmental documents	Project Editor
GIS	Karen Behm GIS Lead I-405 Project Team 600 108th Ave NE, Bellevue WA 98004 425-456-8502 karen.behm@i405.wsdot.wa.gov Matt Miller GIS Coordinator I-405 Project Team 600 108th Ave NE, Bellevue WA 98004 425-456-8603 matt.miller@i405.wsdot.wa.gov
QA/QC procedures	Gayle Birrell QA/QC Coordinator I-405 Project Team 600 108th Ave NE, Bellevue WA 98004 425-456-8612 gayle.birrell@i405.wsdot.wa.gov

APPENDIX A ENVIRONMENTAL DOCUMENT TEMPLATE

An example and layout displaying Styles and Formatting used in this template can be viewed on the following pages.

HEADING 1 (CENTURY GOTHIC, 16 PT BOLD, ALL CAPS)

This page is formatted with Margins Top 1", Bottom 1", Inside 1" and Outside 3.25". Page layout is Different odd and even, Mirror Margins, Header 0.5" and Footer 0.5". This paragraph is formatted with Introduction text from the Styles and Formatting box.

Heading 2 (Century Gothic 14 pt, bold, italic, 12 pt. Before, 3 pt. After)

Body text (Palatino Linotype, 11 pt.)

Heading 3 (Century Gothic, 12 pt. bold, 6 pt. Before, 3 pt. After)

Body text

- Bullets (Palatino Linotype 11 pt., Hanging 0.25"; Spacing 0 pt. Before, 6 pt. After)
- Bullets
- Bullets

Here is the main body of the text. Here is the main body of the text.

Exhibit #-#: Title

Table Header text is Arial Narrow Bold 10 pt.	Header text	Header text
Table text is Arial Narrow 10 pt.	Table text	Table text
Table text	Table text	Table text
Table text	Table text	Table text
Table text	Table text	Table text

Note: This table is formatted with Top and Bottom lines 1 1/2 pt weight, and horizontal row lines of 1/2 pt weight. There are no vertical lines. Table width is 4.25".



Photo caption (Arial Narrow 10 pt bold italic)

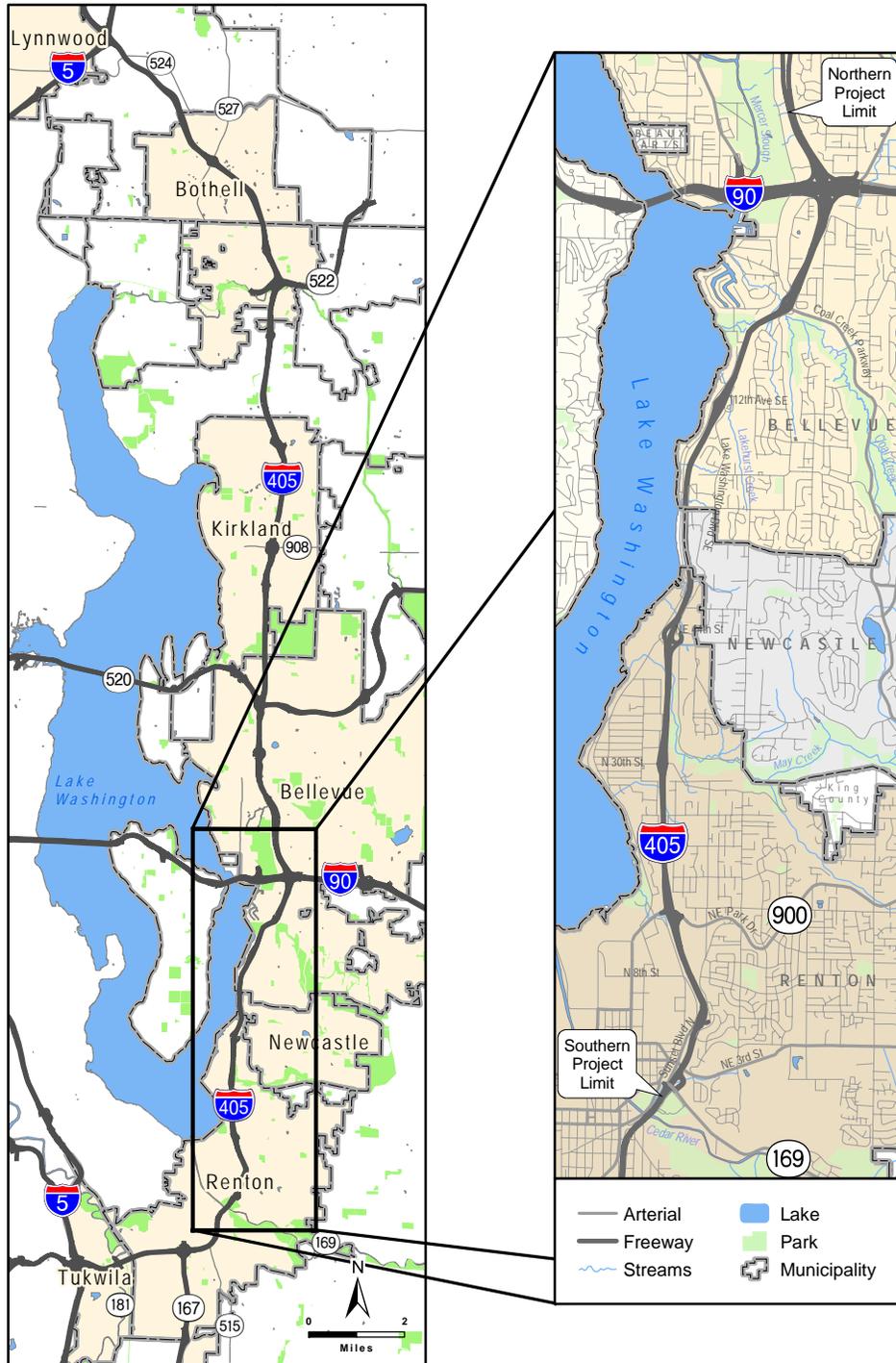
Text box size = Height varies; Width 2.0"

Text box title, Century Gothic 9 pt

Text box text, Century Gothic 9pt

This text box is placed in the wide margin and used to define terms described in the general text, such as, What is an HOV lane?

Exhibit 2-1: Exhibit Title (Arial Narrow 10 pt. Bold, Italic) An example of a full-page exhibit



APPENDIX B PHOTO, SIDEBAR, AND TABLE TEMPLATES

PHOTO PLACEMENT

Copy these text boxes into your document to indicate where your photo(s) should be placed. Photo text box should always be 2.0" wide. Height may vary.

Fill in the appropriate information (i.e., photo name and caption). For details about how to name your photo, see *How do I name graphic source files?* on Page 2-10 of the Environmental Document Template Procedures.

Be sure to place the source photo (in JPG format) in the **Sourcefiles** folder for your discipline report or tech memo.

Link photo on this line

Write your photo caption here



Sample Historic photo 1

Courtesy of the Museum of History and Industry – Seattle, Washington



Sample Historic photo 2

Courtesy of the Seattle Post-Intelligencer Collection, Museum of History and Industry – Seattle, Washington

DO NOT USE THESE ACTUAL PHOTOS WITHOUT SPECIAL PERMISSION

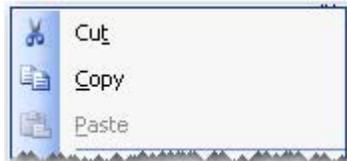
Instructions: Insert a Photo text box into your document

To use the Photo template that is already set up with the proper formatting, you will open the Photo Template file, then copy and paste the photo text box into your environmental document. Detailed instructions follow.

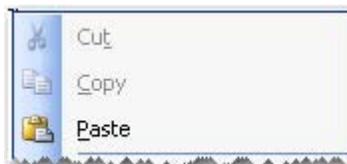
- Select **File | Open**, and browse to the **Templates** folder.



- Select the document named **Photo Template**. Open the document.
- Click inside the desired text box. When you see a four-way arrow, right-click. Select **Copy**.



- Return to your working document and position your cursor on the desired line where you want your photo to appear. Right-click. Select **Paste**.



Link photo on this line

Northwest view of Lake Washington

- The text box will copy to the right margin area. Click and drag the placeholder text box where you want it to be located. Double-check that the placeholder text box is formatted properly (See *Moving a Text Box* on Page B-3).
- Inside the text box, type your caption (see sidebar for example). Your firm's editor will link the JPG file to the document as a separate step.

MOVING A TEXT BOX

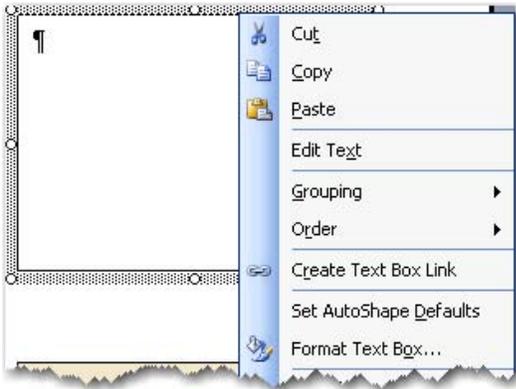
Sometimes it is necessary to realign text boxes within a document. This usually occurs when the text box moves from an odd to an even page (or vice versa), or when a text box is pasted and appears in a different place than you intended. The following instructions are an easy way to horizontally align a text box. You may still have to move the text box slightly in order for it to align correctly, but setting the horizontal alignment will help. Once the text box is horizontally aligned, you can adjust the text box for vertical alignment.

Outside margins for text boxes and graphics

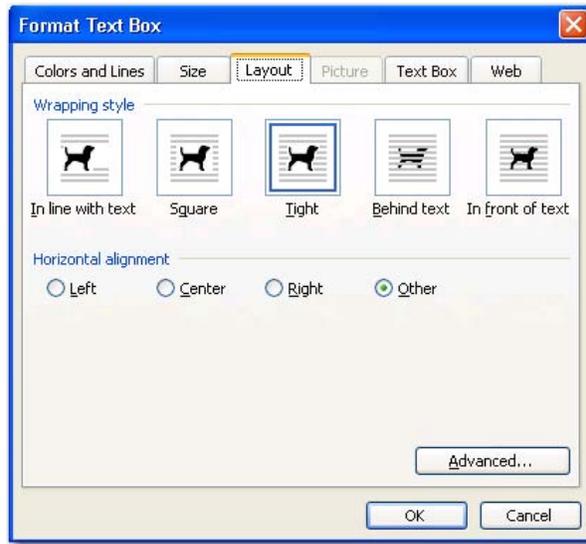
All text boxes and graphics should be no closer to the edge of the page than one (1) inch. The outside vertical edges of a text box or graphic should line up with the header or footer. Look at this text box as an example. The right edge is lined up with the right edge of the header on this page.

Instructions: Moving a text box on a page with 3.25" right margin

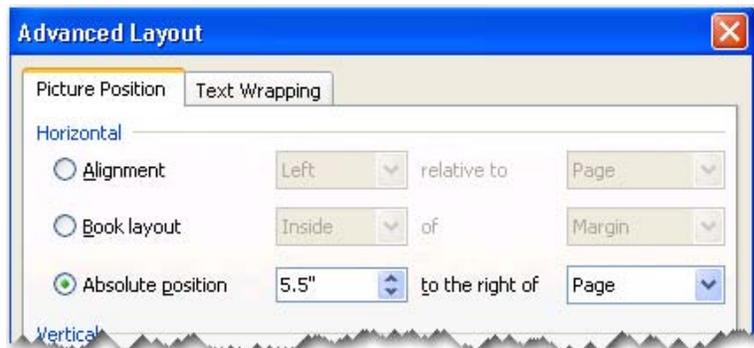
- Highlight the text box and right-click.
- Select **Format Text Box**.



- When in the Format Text Box window, select **Layout**.



- Select **Advanced**. Then select the **Picture Position** tab.
- Select **Horizontal | Absolute Position**.
- To place the text box on an odd page (to the right of text on the page), set the **Absolute Position** to 5.5" to the right of **Page**.



- To place the text box on an even page (to the left of text on the page), set the **Absolute Position** to **1.0"** to the right of **Page**.



Instructions: Moving a text box on a page with 1.0" right margin

All full-page graphics need to be inserted on pages where the right margin has been changed from 3.25" to 1.0". If you are not certain how to create section breaks, modify margins, and modify headers/footers, please contact your firm's editor.

If you are inserting a "full-page" text box for a map figure or chart, the text box may not appear centered on the page. To fix the text box location:

- Select **Format Text Box**.
- When in the Format Text Box window, select **Layout**.
- Select **Advanced**. Then select the **Picture Position** tab.
- Select **Horizontal | Absolute Position**.
- Set the **Absolute Position** to **1.0"** to the right of **Page**.



SIDEBAR PLACEMENT

Two options for sidebars are available. Copy these text boxes into your document and customize to your specific needs.

Detailed instructions for inserting and formatting a sidebar are on the following page.

Text box

This text box is placed in the wide margin and used to define terms described in the general text, such as, What is an HOV lane? This text box can be sized vertically to fit text. However, it should always be 2.0 inches wide.

SPECIAL CALL OUT BOX

This is another example of a text box placed in the wide margin. Its purpose is to inform readers on regulatory terms or on important laws. An example might include a discussion on the Endangered Species Act, when it became a law, and what it was designed to do.

This box should always be 2.0 inches wide.

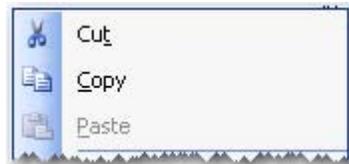
Instructions: Insert a Sidebar into your document

To use the Sidebar template that is already set up with the proper formatting, you will open the Sidebar Template file, then copy and paste into your environmental document.

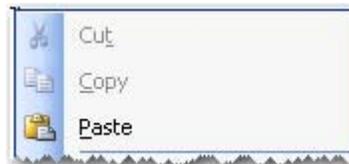
- Select **File | Open**, and browse to the **Templates** folder.



- Select the document named **Sidebar Template**. Open the document.
- Click inside the desired text box. When you see a four-way arrow, right-click. Select **Copy**.



- Return to your working document and position your cursor on the desired line in which you want your sidebar to appear. Right-click. Select **Paste**.



- The sidebar will copy to the right margin area. Click and drag the sidebar where you want it to be located. Double-check that the sidebar text box is formatted properly. (See *Moving a Text Box* on Page B-3).
- Edit your sidebar by adding desired text. Check that the Sidebar style is applied to the text. Vertically size the sidebar so that all your text shows and there is an even amount of white space at the bottom and top of the sidebar.

TABLE PLACEMENT

Copy this table into your document, add or delete rows and columns, and choose the appropriate style for the cells. Styles for table text that is centered, right-aligned, bold or highlighted are some of your choices.

Because tables are numbered and named as Exhibits, you must change the top of the table to reflect the chapter number and sequence of the table, and add a descriptive title for the table. For example *Exhibit 4-2: Surface Water Runoff*.

The **Table Properties | Preferred Width** has been preset to 4.25 inches. Detailed instructions for inserting and formatting a table are on the following pages.

Exhibit #-#: Table title goes here

Header text	Header text	Header text	Header text
Table text	000	000	000
Table text	000	000	000
Table text	000	000	000
Table text	000	000	000

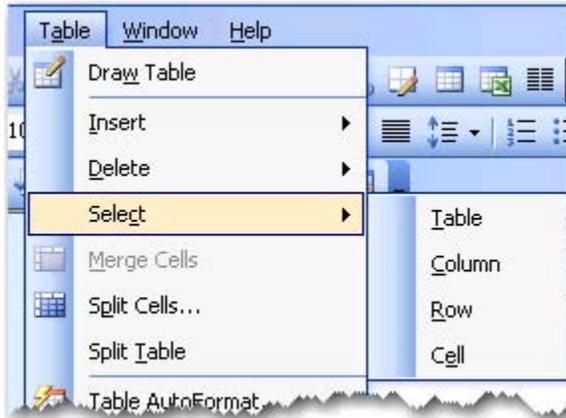
Instructions: Insert a Table into your document

To use the Table template that is already created with correct formatting, you will open the Table template file, then copy and paste the empty table into your document. Detailed instructions follow.

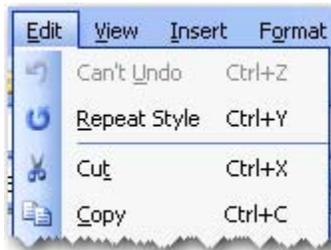
- Select **File | Open**, and browse to the **Templates** folder.



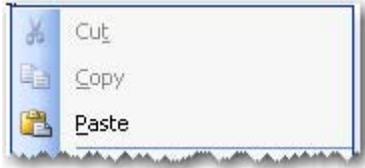
- Select the document named **Table Template**. Open the document.
- Click inside the table, select **Table | Select**. Select **Table** from the drop-down list.



- Select **Edit | Copy**.



- Return to your working document and position your cursor on the desired line in which you want your table to appear. Right-click. Select **Paste**.



- Inside the table, type the Exhibit number and description. For example: *Exhibit 4-2: Surface Water Runoff*.

Exhibit 4-2: Surface Water Runoff

Header text	Header text	Header text	Header text
Table text	000	000	000
Table text	000	000	000
Table text	000	000	000
Table text	000	000	000

- Add columns and rows as appropriate.

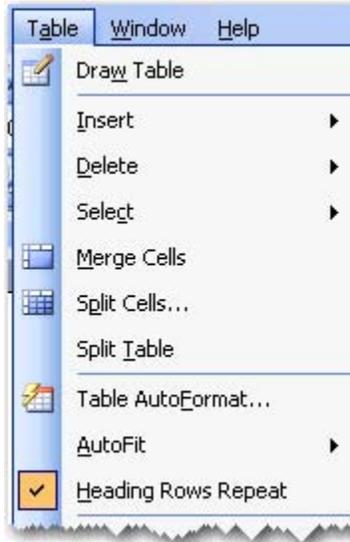
Heading Rows to Appear on Every Page

Once you have inserted and revised tables in your document, you can ensure that the heading row appears on every page (if the table should be split between pages):

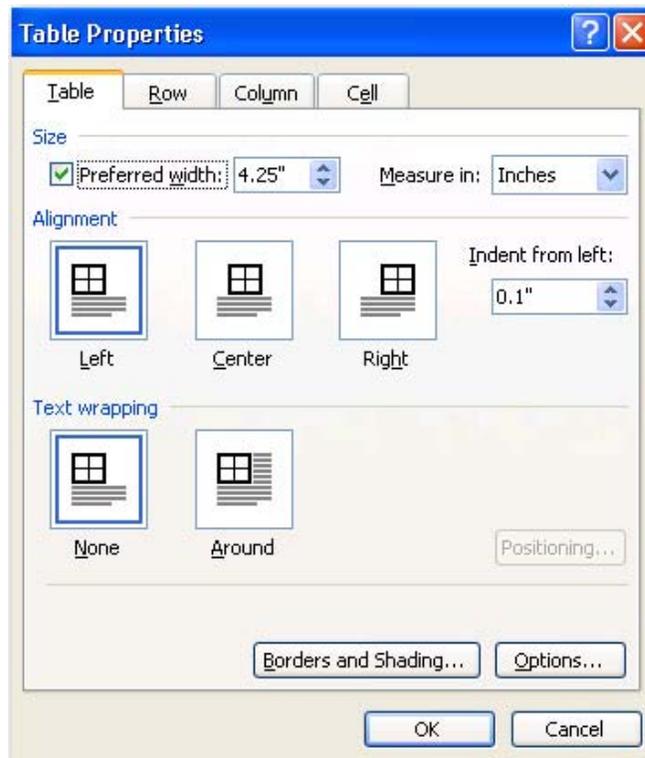
- Highlight the title row and heading row(s) in the table with your cursor.



- Select **Table**. Click on **Heading Rows Repeat** so a checkmark appears.



- The table width should be set to 4.25" to align with the main body text in the document. If your table is wider than the main body text, your firm's editor should format the table appropriately.



APPENDIX C CHART TEMPLATES

CHART PLACEMENT

*One of the primary goals of the Reader-Friendly format is to make technical information more visual and easier to understand. Often, the best way to reduce the volume of narrative text or to summarize findings is to use charts to illustrate trends or compare data. For convenience, we have created several chart examples in a Microsoft Excel workbook that are available to you in the **Templates** folder. Variations of these sample charts have been used successfully in other Reader-Friendly documents because they are formatted simply and tell a clear story. The workbook contains several preset chart types (pie, bar, line, and more), with simulated data sets that can be changed to reflect your own data to create new, customized charts.*

*These charts are provided as guidelines and tools. You may wish to create your own charts using Reader-Friendly concepts and tools. Outlined below are some quick guidelines for using the chart samples provided in the **Templates** folder. There are three main steps to using and inserting charts into your document. They are:*

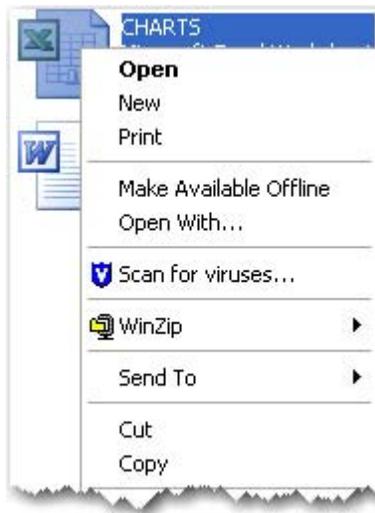
1. Copy the charts template to the appropriate **SourceFiles** subfolder;
2. Create your charts; and
3. Insert chart text box in the environmental document so your firm's editor can link the chart.

Detailed instructions follow.

Instructions: To copy the example charts into your working folder

To use the Charts template, you will make a copy of the entire Excel template file and paste it into your working folder. Rename the file once it is pasted into your working folder. Detailed instructions follow.

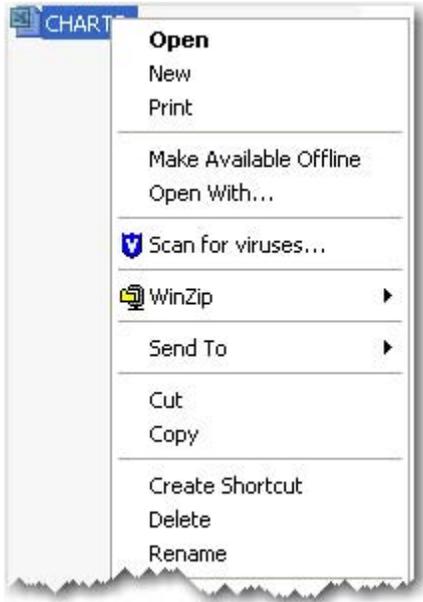
- Go to the **Templates** folder.
- Highlight the MS Excel file named **CHARTS**. Right click and select **Copy**.



- Browse to the appropriate **SourceFiles** subfolder for your environmental document. Right click and select **Paste**.



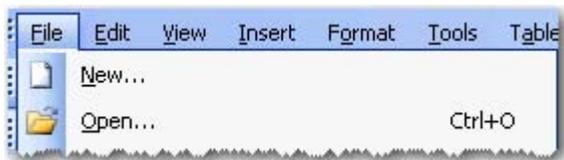
- IMMEDIATELY **rename** the file to a unique name using the appropriate naming conventions (otherwise, if someone else copies/pastes the CHARTS template into your **SourceFiles** folder, it will overwrite yours if it is not renamed). To rename a file, right-click and select **Rename**.



Instructions: To create an Excel chart

The Charts template includes several different chart types. Choose a chart and enter your unique data. After the chart is completed, you will copy it into its own worksheet and rename the new worksheet with the appropriate Exhibit number. Detailed instructions follow.

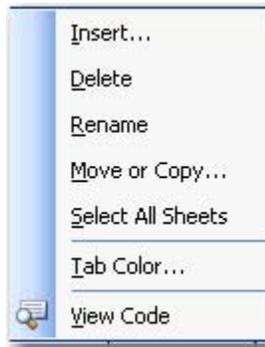
- In MS Excel, select **File | Open**, and browse to the **SourceFiles** subfolder where your workbook was saved.



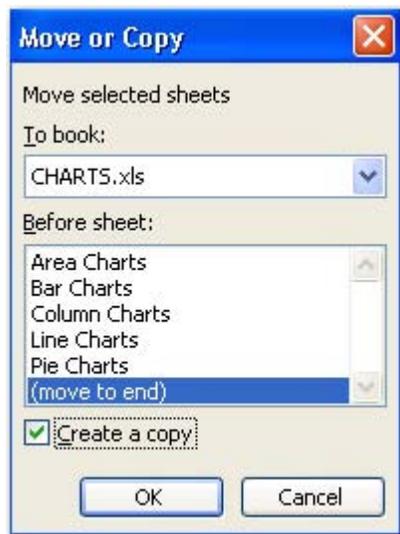
- Choose a chart type you wish to use from any of the tabs on the lower part of your screen. Or, create a new tab and create your own customized chart.



- If you use one of the preformatted charts, revise the data next to the chart including numbers, titles and X and Y axes to create your chart. You may use the **Drawing Toolbar** to add fill colors or black and white to your data fields from the preset color palette.
- Give each chart in your workbook an appropriate exhibit number and title. For example: *Exhibit 3-5: Eight-hour Carbon Monoxide Levels*.
- Each completed chart should be on its own worksheet. As you complete each of your charts, copy the worksheet, and place the copy at the end of the workbook. Highlight the worksheet tab you wish to copy. Right-click and select **Move or Copy**.



- Select the location of the new copy, which should be at the end of the workbook.



- Rename the worksheet with the appropriate exhibit number.



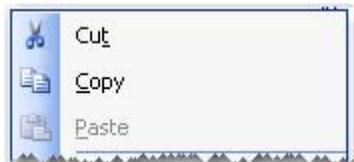
Instructions: To place a Chart text box in your MS Word document

After you have created your chart, you will insert a text box into your environmental document so your firm's editor knows where to link the chart. Detailed instructions follow.

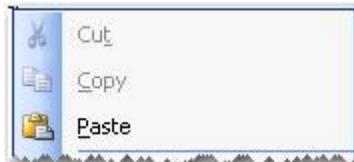
- In MS Word, select **File | Open**, and browse to the **Templates** folder.



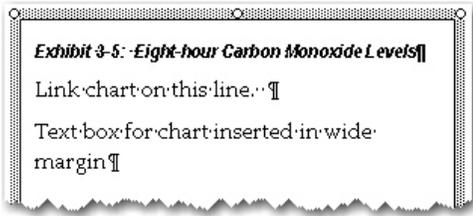
- Select the document named **Chart Templates**. Open the document.
- Click inside the desired text box. When you see a four-way arrow, right-click. Select **Copy**.



- Return to your working document and position your cursor on the desired line where you want your chart to appear. Right-click. Select **Paste**.



- The text box will copy to the right margin area. Click and drag the text box where you want it to be located. Double-check that the text box is formatted properly (See *Moving a Text Box* on Page B-3).



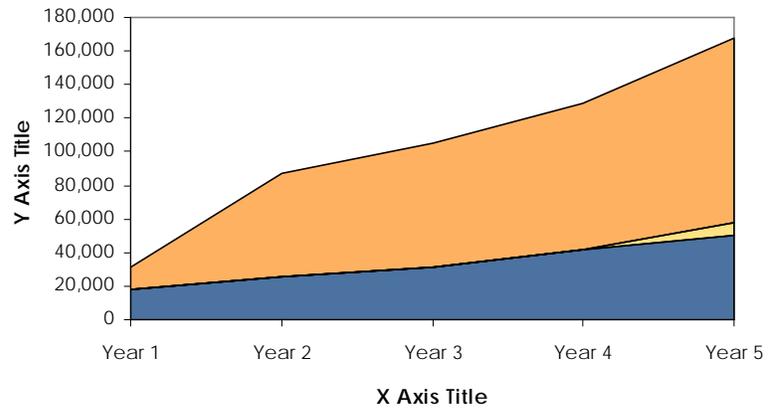
- Inside the text box, type the Exhibit number and description. Your firm's editor will link the XLS file to the document as a separate step.

Chart Color Palette

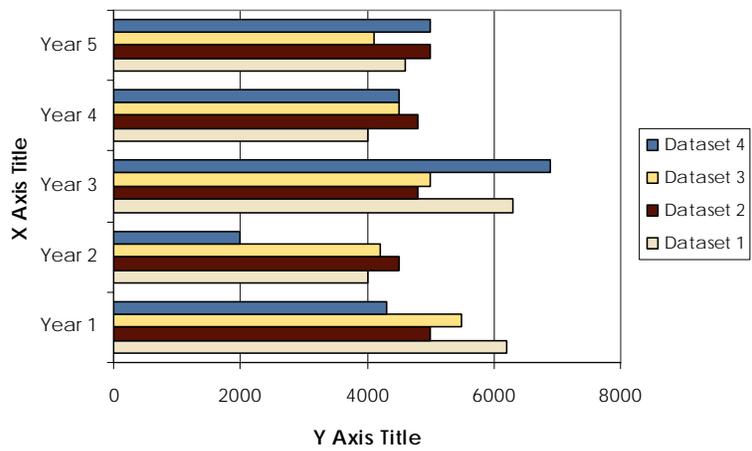
CHART COLORS	CHART GREYSCALES
255,247,206	255,255,255
239,228,197	234,234,234
255,226,130	221,221,221
255,177,98	192,192,192
75,115,160	128,128,128
195,180,95	77,77,77
175,126,64	28,28,28
89,17,3	0,0,0

Chart Templates

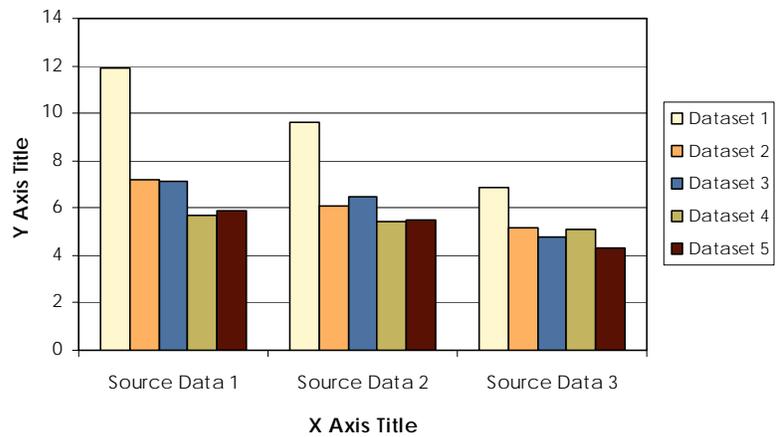
Color Area Chart



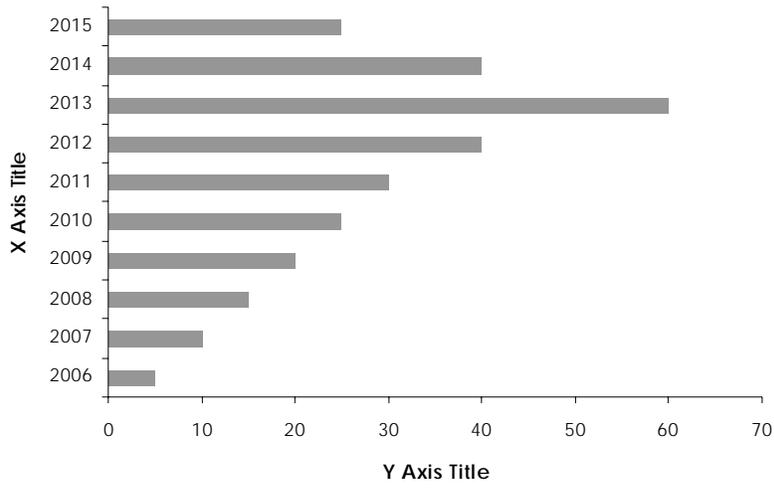
Color Bar Chart



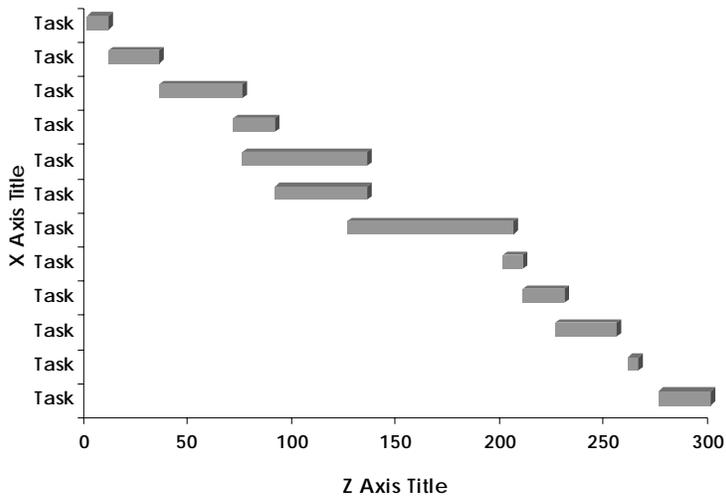
Color Column Chart



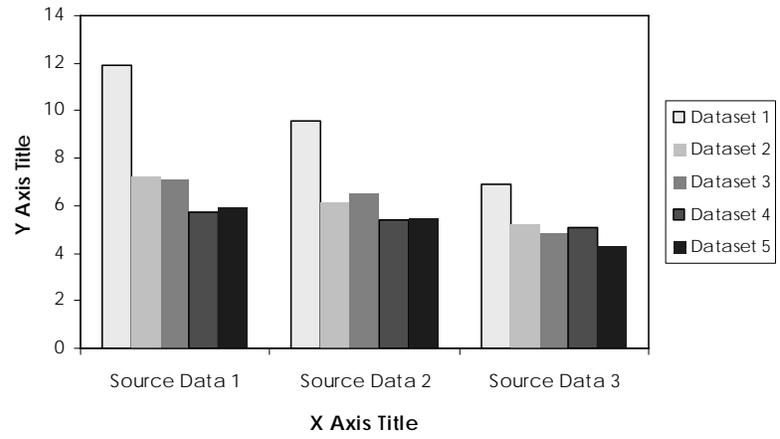
Black and White Bar Chart



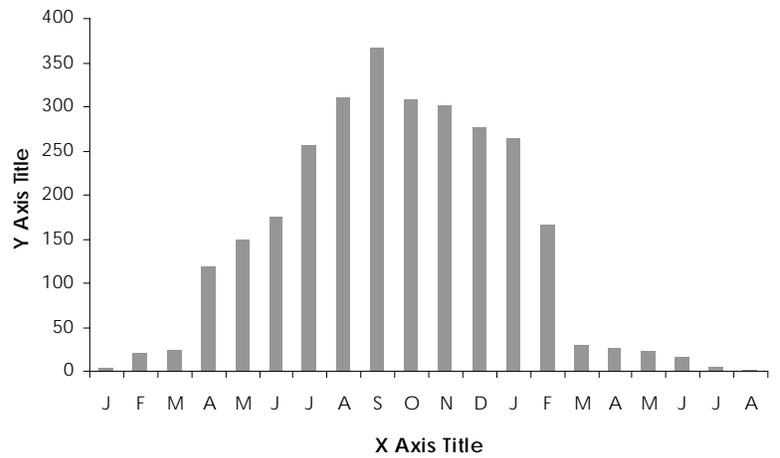
Floating Bar Chart



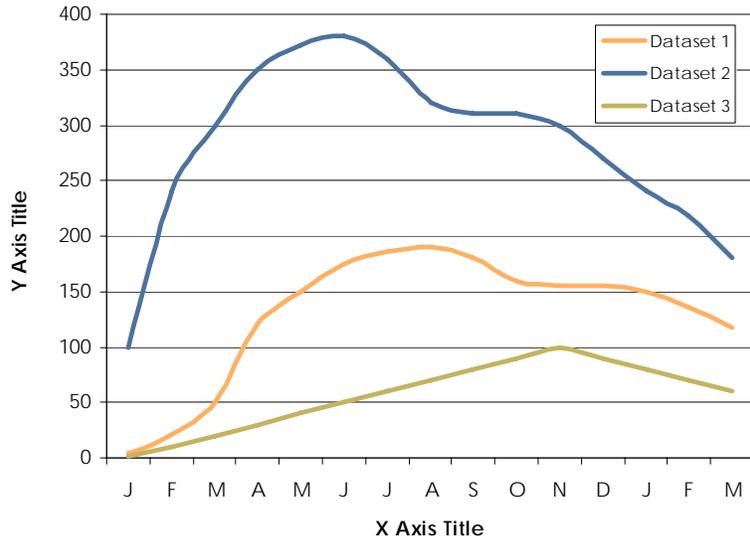
Black and White Column Chart



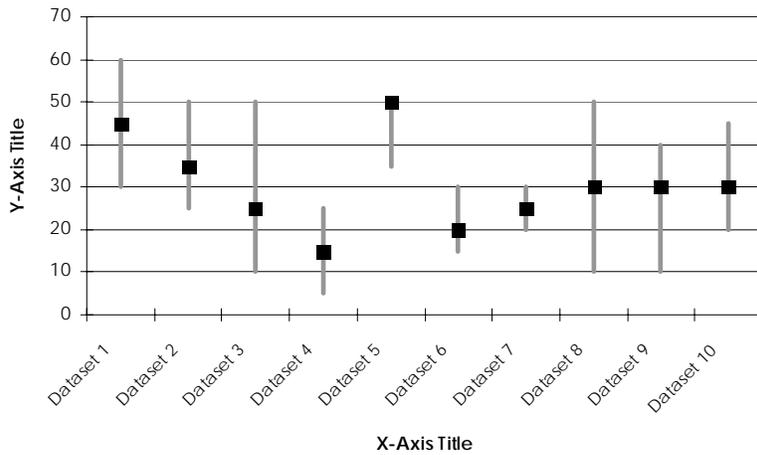
Black and White Column Chart



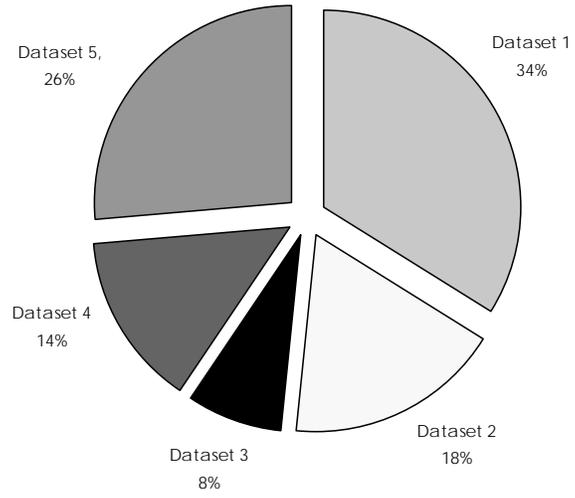
Color Line Chart



Stock Chart



Exploding Pie Chart



APPENDIX D MAP FIGURE TEMPLATES

The following GIS templates are provided as samples and tools for standardizing map figures within environmental documents. For an overview about these templates, see Section 2. Details about how to use these templates are on the following pages in this Appendix.

Once the GIS figures are created by the document author and his/her GIS staff, a text box is inserted into the MS Word environmental document so your firm's editor will know where to link the graphic. Instructions for inserting a Map Figure text box follow.

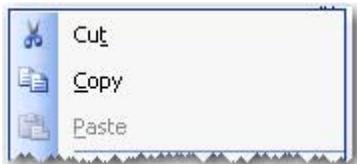
MAP FIGURE PLACEMENT

Instructions: Insert a Map Figure text box into your document

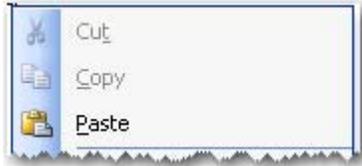
- Select **File | Open**, and browse to the **Templates** folder.



- Select the document named **Map Figure Templates**. Open the document.
- Select the appropriate size text box that matches your map (see *Exhibits D-1 through D-12* for examples). Click inside the desired text box. When you see a four-way arrow, right-click. Select **Copy**.



- Return to your working document and position your cursor on the desired line in which you want your exhibit placeholder to appear. Right-click. Select **Paste**.



- The text box may not copy to the location you intended. Click and drag the text box where you want it to be located. Double-check that the placeholder text box is formatted properly (See *Moving a Text Box* on Page B-3).
- Inside the text box, type the Exhibit number and description. Your firm's editor will link the EMF file to the document as a separate step.



Map Book Templates

Map book – Portrait, legend on side

Exhibit D-1 (on following page) shows one map within a map book series from the Renton to Bellevue Project. This template, with the legend on the right, works well for North-South (N-S) oriented projects.

Map book – Portrait, legend on bottom

Exhibit D-2 (on following page) shows one map within a map book series from the Renton Nickel Project. This template, with the legend on the bottom, works well for East-West (E-W) oriented projects.

Exhibit D-1: Map Book - Portrait, legend on side

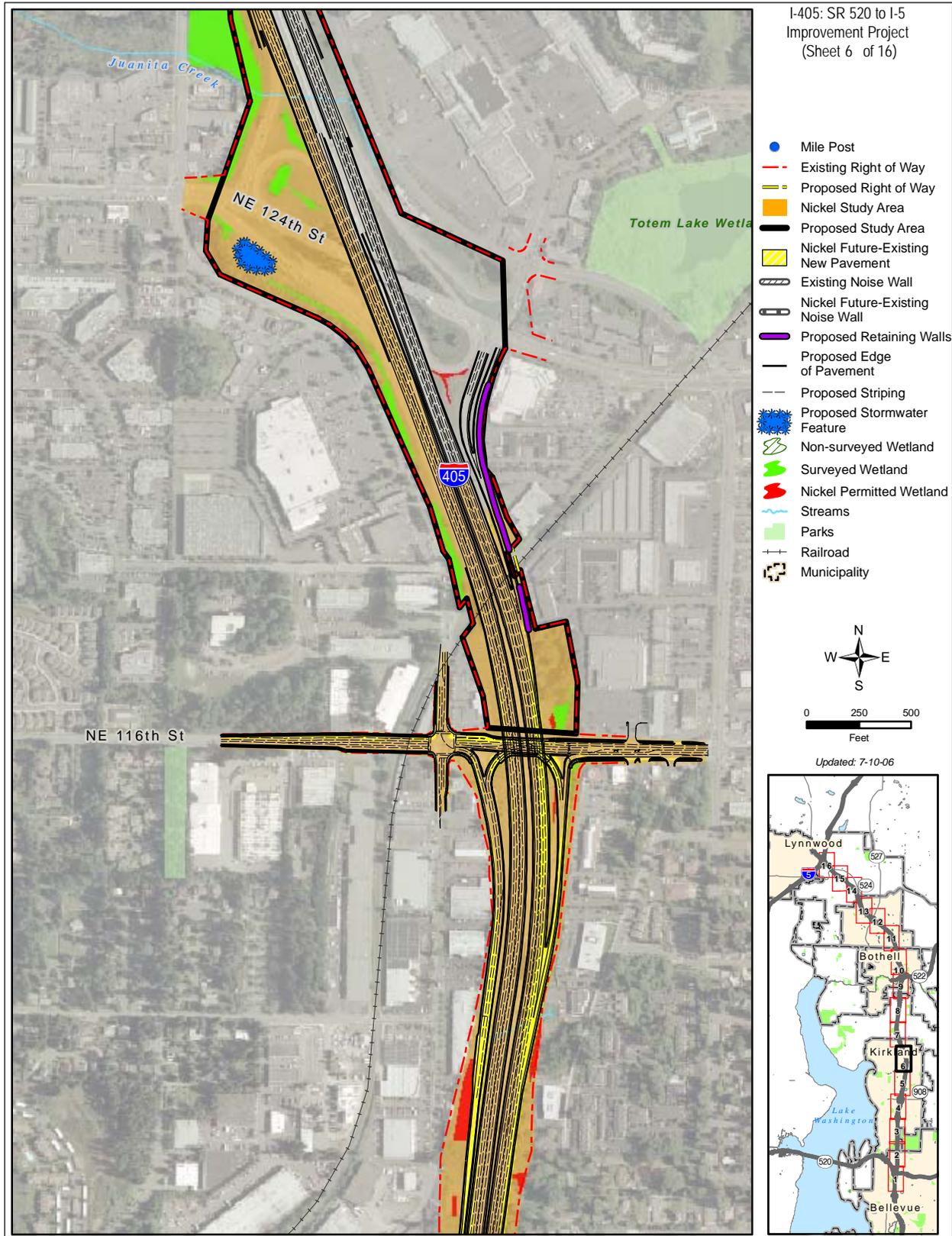


Exhibit D-2: Map Book - Portrait, legend on bottom



Exhibit D-3: Sidebar - N-S Skinny



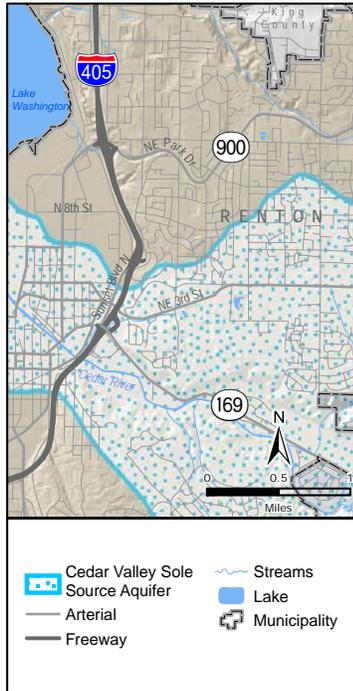
Partial Page Templates

Sidebar

Sidebar -N-S “Skinny”

The “skinny” template works well for displaying information along the full length of a N-S oriented project. This example is from the Kirkland Nickel project. This template is designed to sit in the sidebar of the document, and it is the most frequently used template in Environmental Assessments.

Exhibit D-5: Sidebar Half-Skinny



Sidebar: “Half-Skinny”

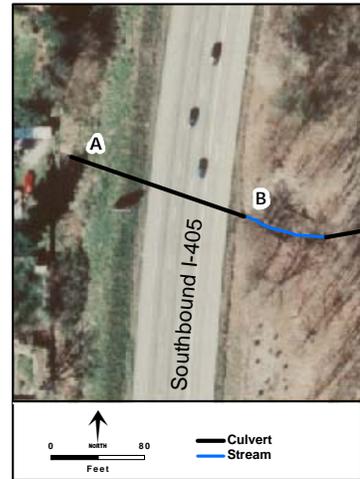
“Half Skinny” templates are designed to be used as a zoom in on the project where a full skinny doesn’t adequately display the features being described in the text. This template also allows the author to incorporate other exhibits (photos and graphs) that relate to the map.

The data frame in this template is variable in height, however the legend box is not. The width cannot be changed due to restrictions in size for the sidebar. The data frame can be any height up to the dimensions of a full skinny.

Exhibit D-5 shows an example of the Half-Skinny taken from the Renton to Bellevue Project.

Exhibit D-6 is an example of a Sidebar Half-Skinny with photographs underneath the map from the Kirkland Nickel Project.

Exhibit D-6: Sidebar Half-Skinny



A: Downstream



B: Upstream



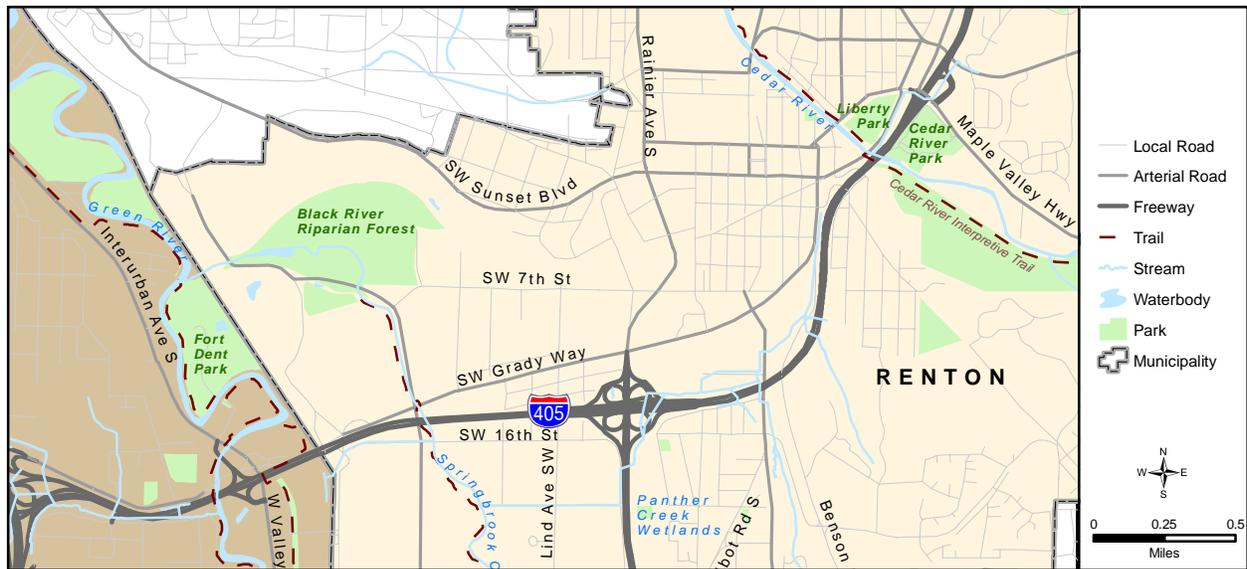
Body of Text

Body: East-West (E-W) “Skinny”

An E-W Skinny is a N-S skinny on its side and sits within the text instead of in the sidebar. This type of template works well for E-W oriented projects.

Exhibit D-7 is an example from the Renton Nickel Project.

Exhibit D-7: Body - E-W Skinny

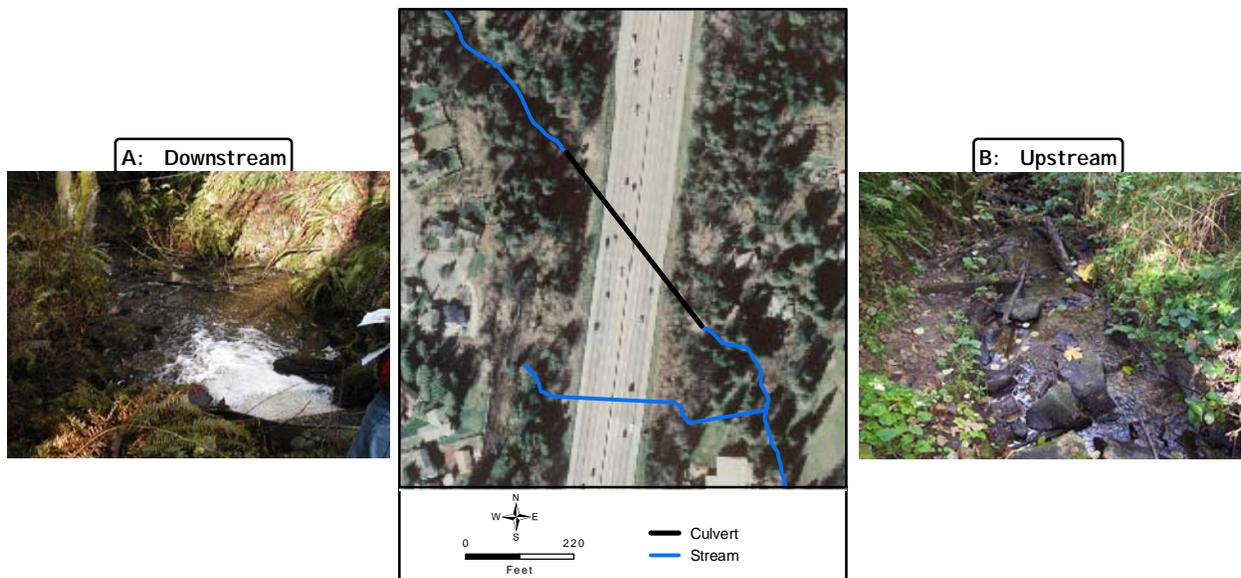


Body: "Half-Skinny"

An E-W "half skinny" is designed to zoom in on the project where a full E-W skinny doesn't adequately display the features being described in the text. This template allows the author to incorporate other exhibits (photos and graphs) that relate to the map.

Exhibit D-8 is an example of a Body Half-Skinny with photographs to the left and right of the map from the Kirkland Nickel Project.

Exhibit D-8: Body - Half-Skinny

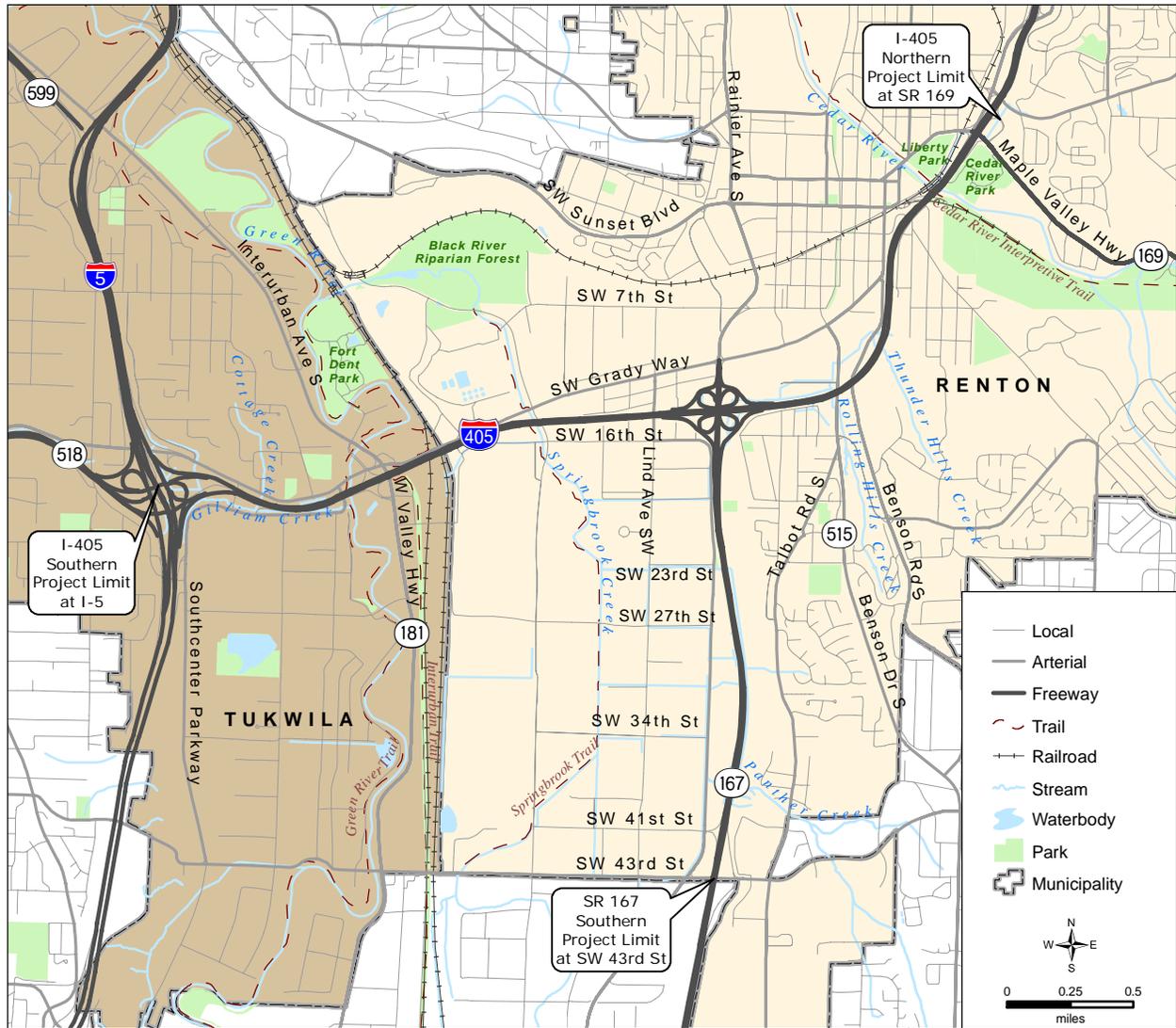


Body: Box

The “Box” template works well for projects that are not quite N-S or E-W. This was the most used template for the Renton Nickel project due to the “Y” shape of the project.

Exhibit D-9 is an example of a Box map from the Renton Nickel Project.

Exhibit #-#: Box Exhibit Title



Full Page Templates

I-405 Vicinity map”

The map is designed to show the whole I-405 corridor and also to show where the project area is in relationship to it. Exhibit D-10 is an example of the Renton to Bellevue project. It is made up of two “skinny” maps where the project area map is an extent of the I-405 corridor map. The data frame size for the I-405 corridor map is exactly the same size as a “skinny.” The project area map is a scaled-down skinny.

Skinny with zoom-in

Exhibits D-11 and D-12 show the Kirkland Nickel and Renton to Bellevue projects respectively. These projects used the “skinny” with zoom-ins to highlight features in key areas of the project area.

Exhibit D-10: I-405 Vicinity Map

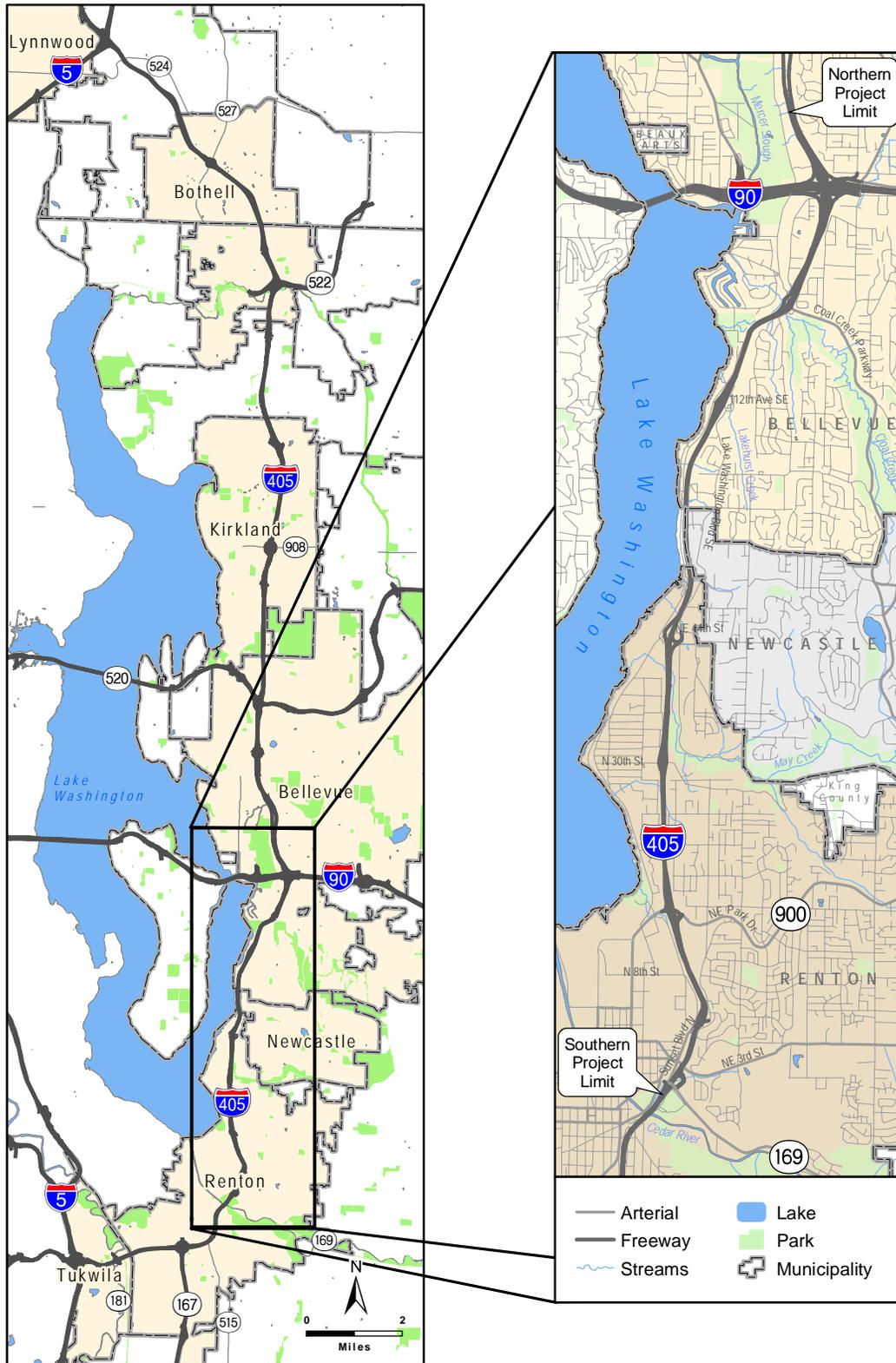


Exhibit D-11: Skinny with Zoom-in

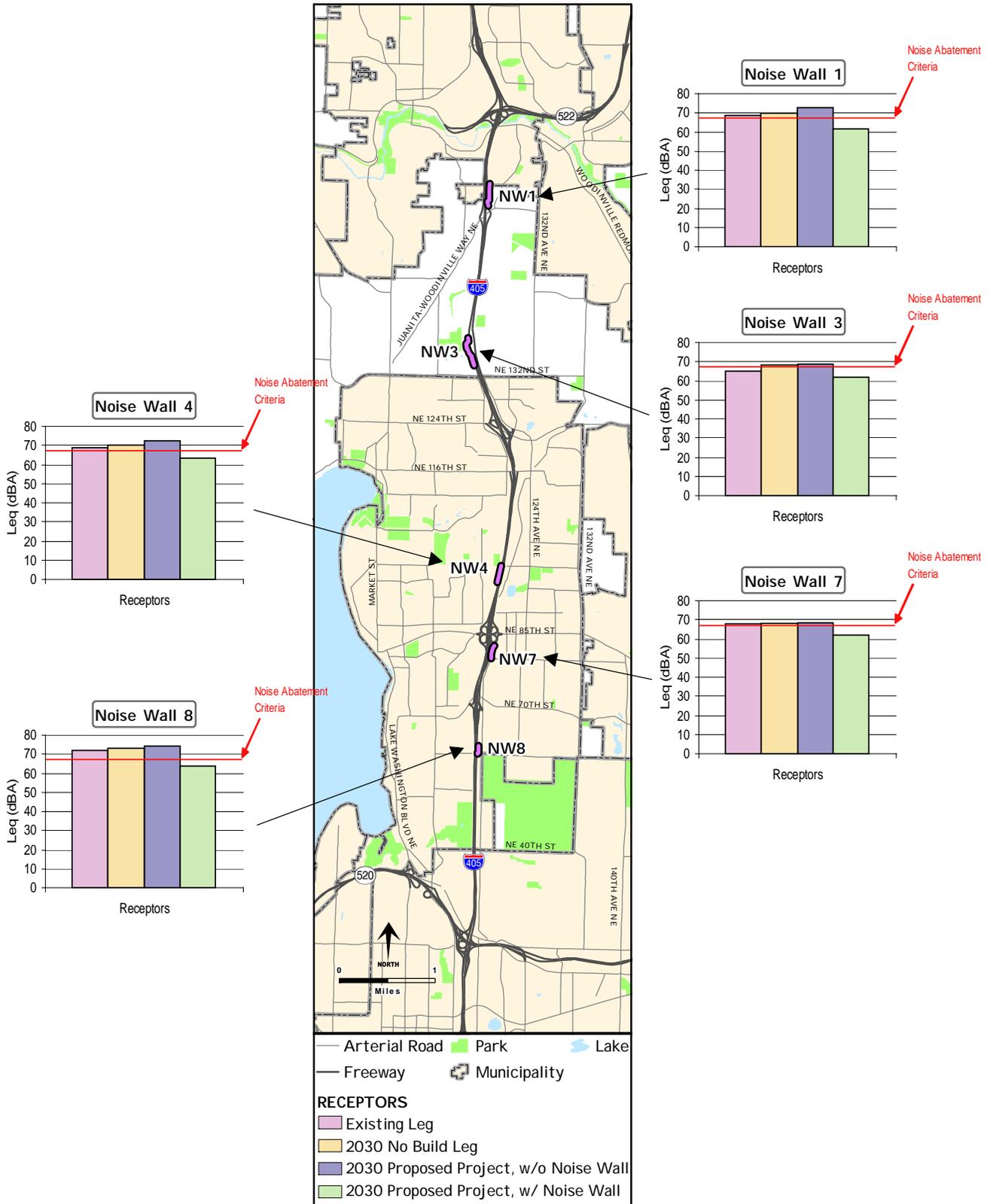
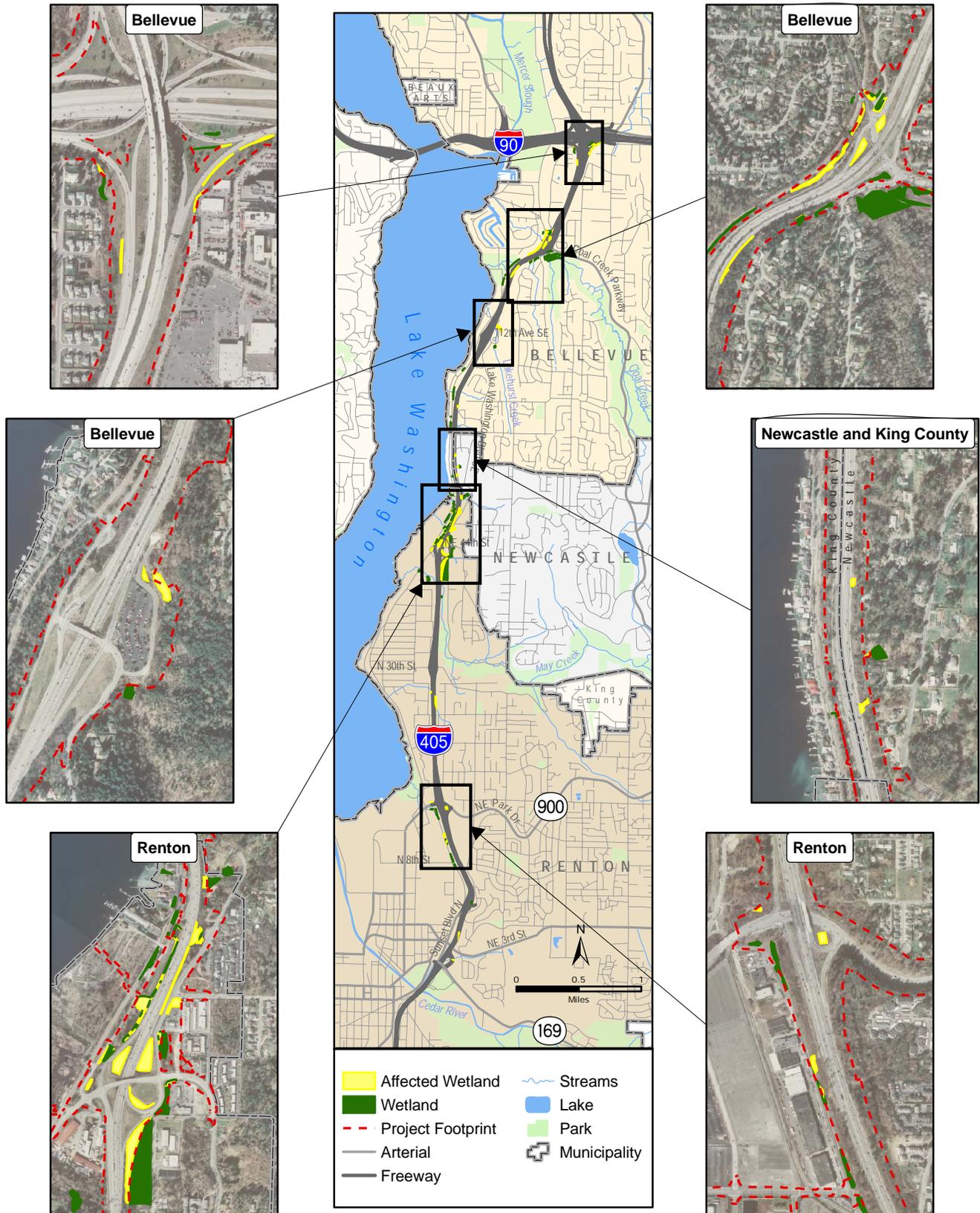


Exhibit D-12: Skinny with Zoom-in



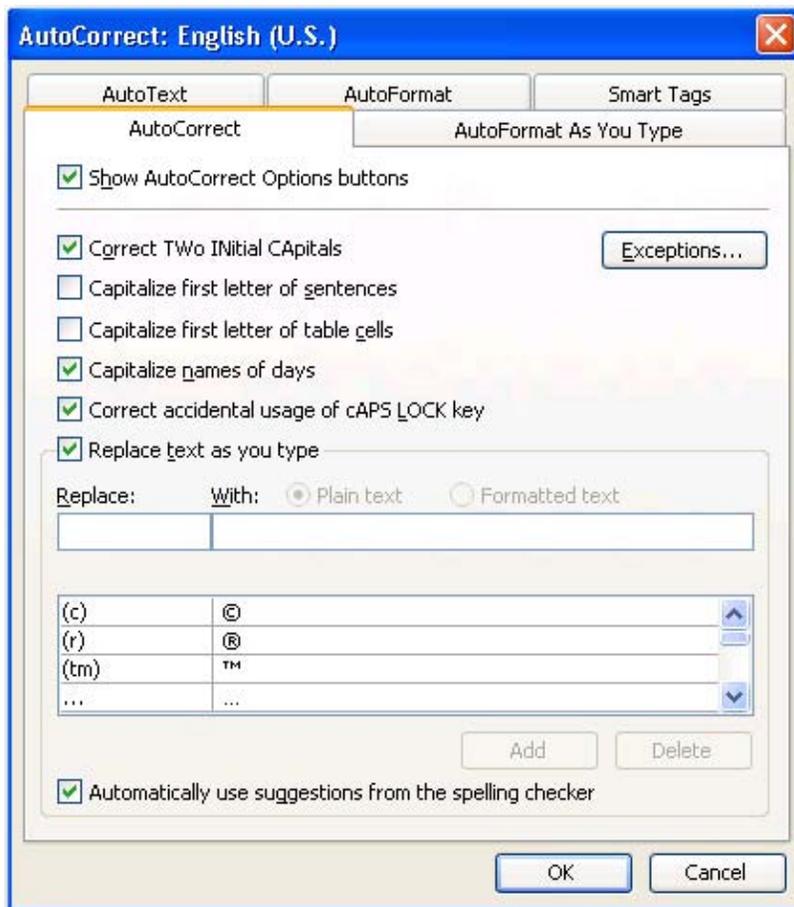
APPENDIX E SETTING UP USER PARAMETERS

Before you begin working in your environmental document, it is necessary that you modify your MS Word settings to match the WSDOT project standards. The WSDOT settings are shown below.

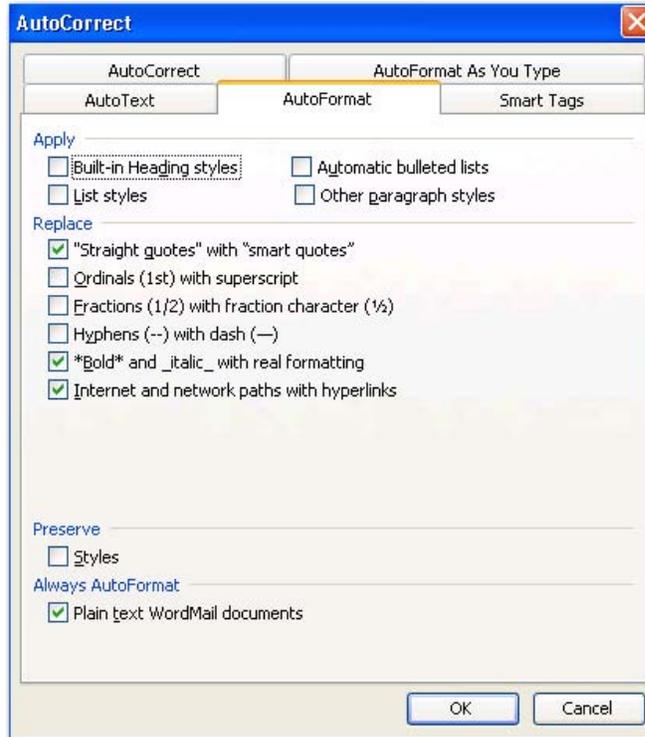
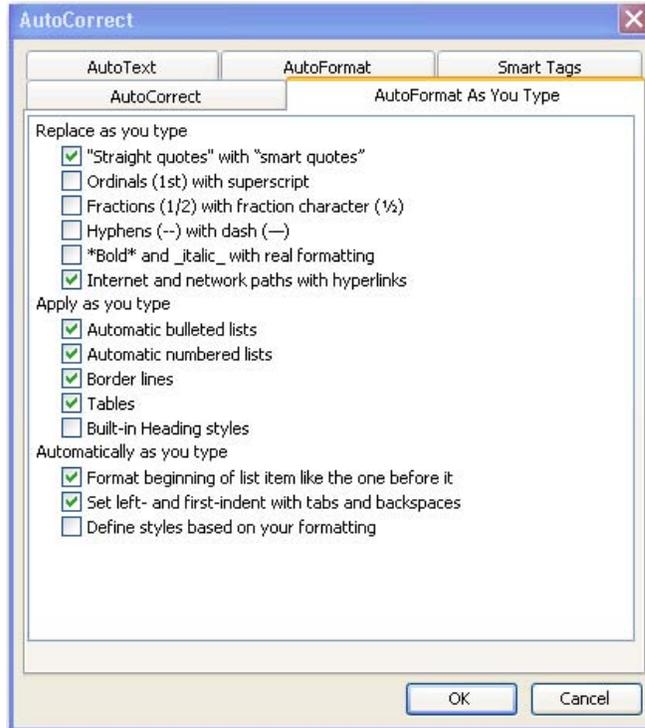
Changing your AutoCorrect options

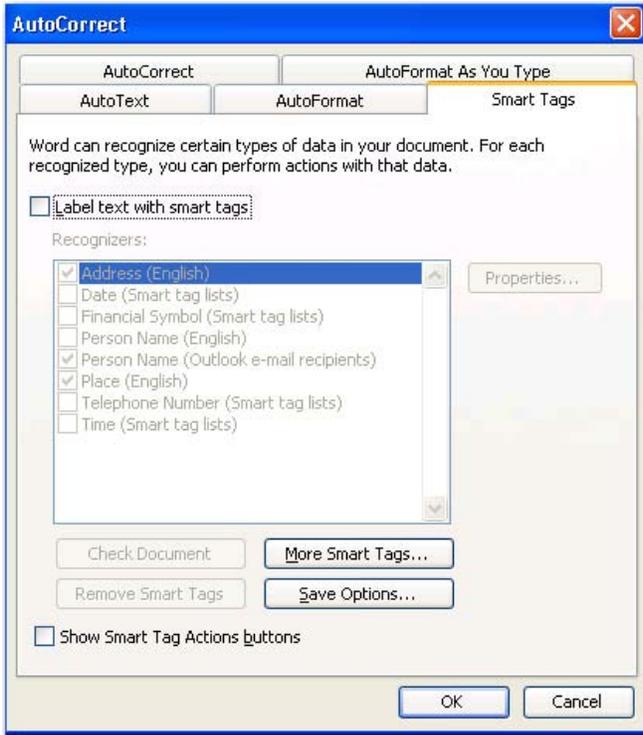
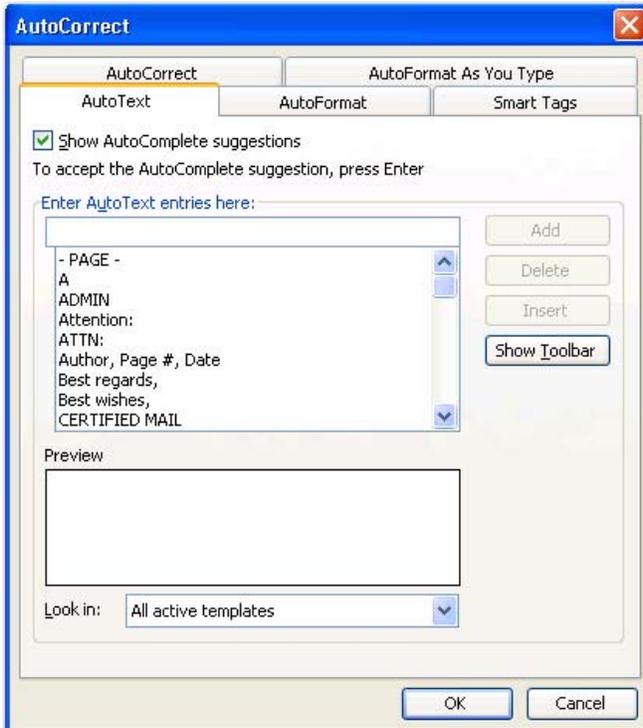
In MS Word 2003, select **Tools | AutoCorrect Options**.

Check your settings and change them (if necessary) to match the settings shown below. Note that the screen captures shown below are for MS Word 2003.



ENVIRONMENTAL DOCUMENT TEMPLATE PROCEDURES

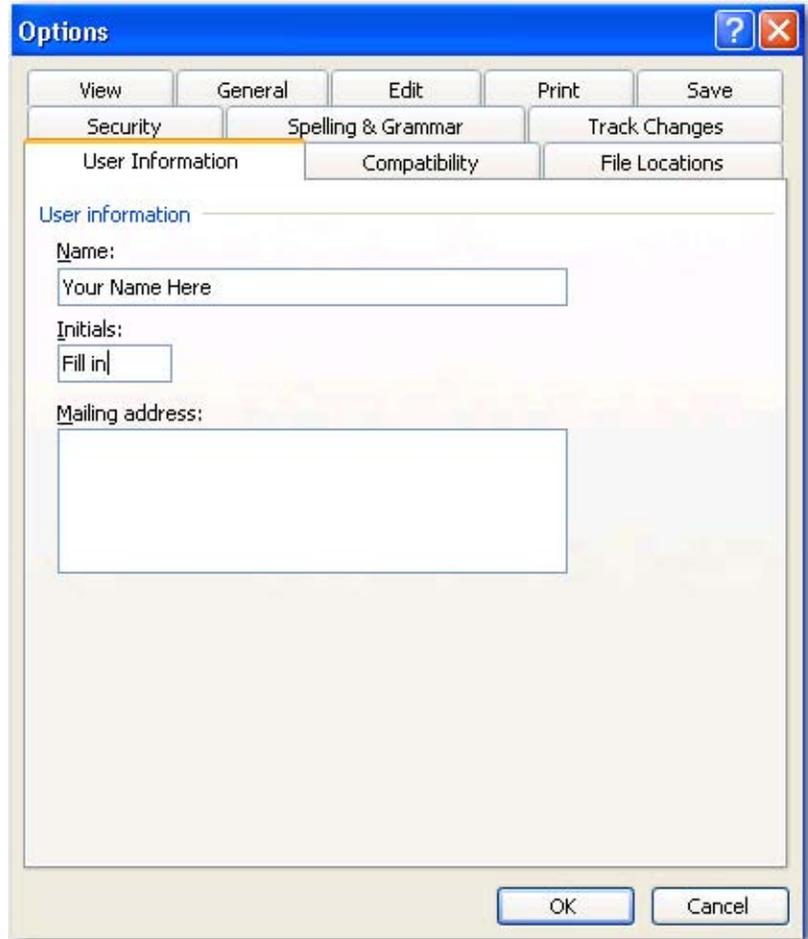


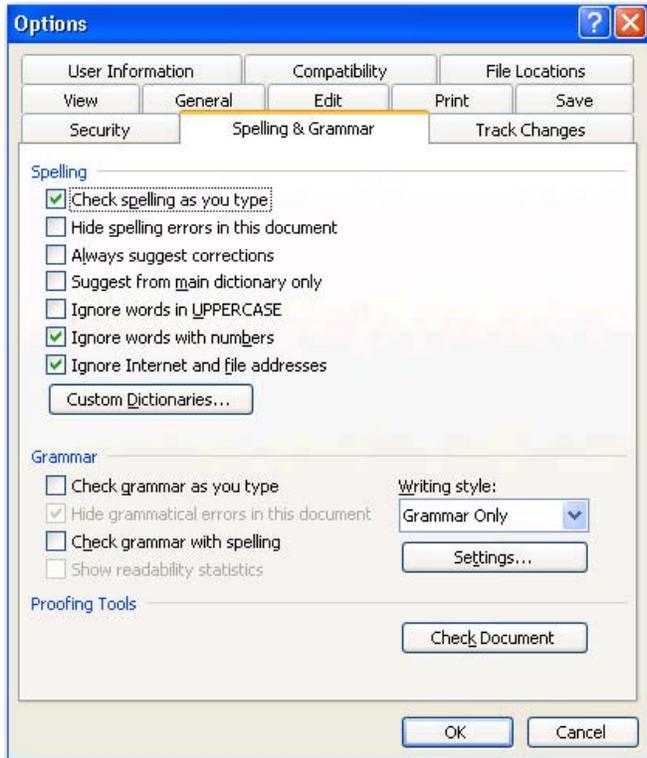


Changing your settings in Tools | Options

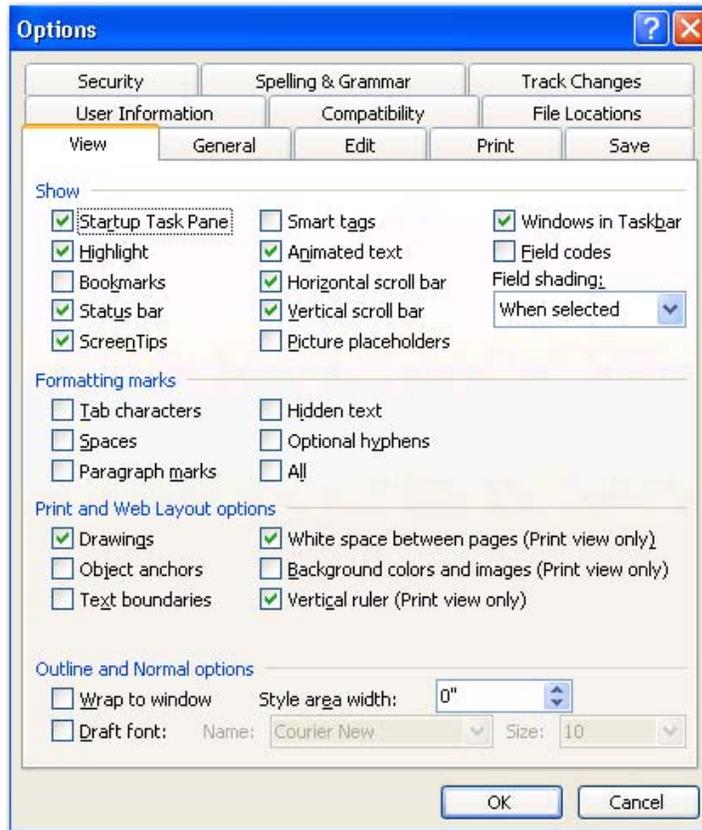
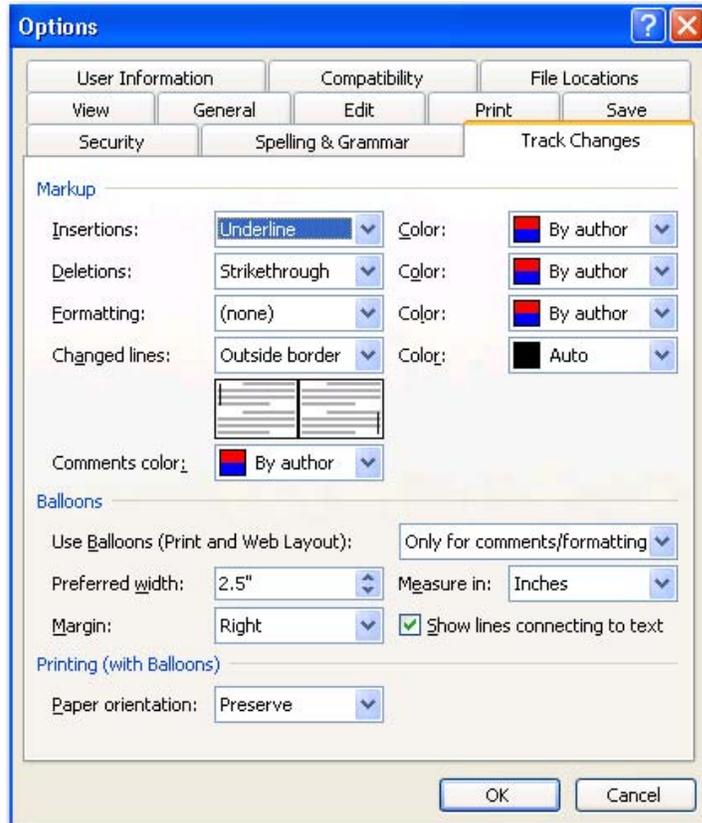
In MS Word 2003, select **Tools | Options**.

Check your settings on the tabs shown below and change them (if necessary). Note that not all of the tabs require changes - only the ones shown here.





ENVIRONMENTAL DOCUMENT TEMPLATE PROCEDURES



APPENDIX F HOW TO WORK WITH THE PROJECT DOCUMENTS

*As a document author, you should work on the environmental document in the **docCurrent** folder located on your local computer or network. Before you begin working in the document, it is necessary that you modify your MS Word user settings as shown in Appendix E. Please take the time to review these Environmental Document Template Procedures in their entirety. This material should give you a good overview of how and why these procedures have been created. When you are ready to begin writing your document, keep the following tips in mind:*

How do I view and use styles?

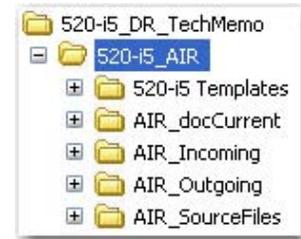
The environmental document template is set up in MS Word 2003 to use specific formatting choices for text, headings, tables, captions, numbered lists, bullets, and sidebars. When you need to apply a different format to any part of the document, you will choose the appropriate formatting from preset styles. To look at all your Style choices, open the **Styles and Formatting** list:

Go to **Format | Styles and Formatting**

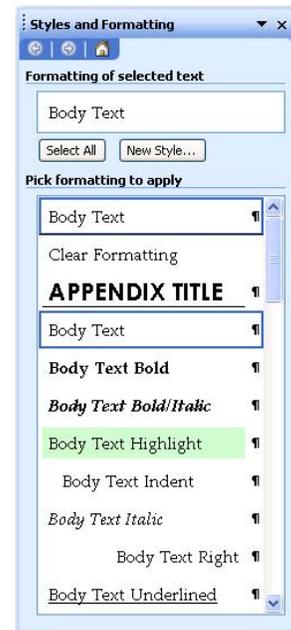
The Styles and Formatting list will appear on the right side of your screen. If you are not familiar with styles, consult your editor or MS Word Help for details.

How do I modify headers and footers?

Since the page format for our reader-friendly documents requires odd/even and mirror image page setup, headers, and footers can become problematic very quickly. The discipline report master document includes headers and footers that require minimum editing. However, if you insert pages, create new sections, or change the page setup, you will need to double-check the footers, page numbering and headers. Due to the use of odd/even pages, headers and footers must be formatted a certain way. However, you can format headers/footers by choosing the correct style from the Styles list. Should you run into problems with headers and/or



This view shows the 520-i5 project Air Quality document folders as an example.



footers not formatting properly, please contact your firm's editor for assistance.

How do I properly copy and paste text from other documents?

From time to time, you may need to copy portions from other documents that you plan to use in your report. Note that you will always need to format any text you paste into your discipline report with an appropriate style from the **Styles and Formatting** list.

When copy/pasting data from another document into your report:

- Insert a **Footnote** at the end of the borrowed text and note where the text came from and the current date. See *How do I properly cite or copy text from other sources?* below for formatting instructions. (See MS Word Help for details about how to insert Footnotes.)

How do I properly cite or reference text from other sources?

When using text from other sources, insert a footnote in your report referencing the material you are using.

Text from a Formal Publication

If the text you are referencing or borrowing is from a formal publication, use the following citation format:

Agency or code/regulation, date of publication, *title*, location of agency. Examples follow:

USDOT (U.S. Department of Transportation), Federal Highway Administration, 1982. *Procedures for Abatement of Highway Traffic Noise and Construction Noise*. Federal-Aid Highway Program Manual. Volume 7, Chapter 7, Section 3. Washington, D.C.

Washington Administrative Code, March 1989. Chapter 173-60. *Maximum Environmental Noise Levels*. Olympia, Washington.

WSDOT (Washington State Department of Transportation), 1987. Directive D22-22, *Noise Evaluation Procedures for Existing Highways*. Olympia, Washington.

Text from a Non-Published Document

If the text you are copy/pasting is from another informal publication such as a project draft discipline report or technical memo, use the following reference format:

Project, date of publication, title. An example follows:

I-405, Renton to Bellevue Project, December 2005, Fish and Aquatic Resources Discipline Report.

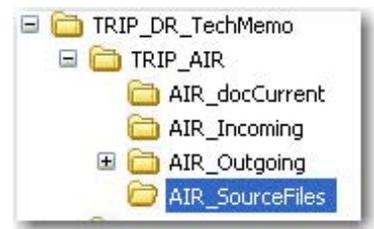
What are the steps for linking graphics in discipline reports?

Document authors are required to submit graphics in specific formats at specified resolutions (see *Exhibit 2-1*). For discipline reports, the graphics are to be linked (vs. embedded). Details about graphics can be found throughout this Environmental Document Template Procedures manual.

Once a graphic is ready to be linked to the document:

1. The graphic file is to be named according to the naming conventions list (see *How do I name graphic source files?* in Section 2);
2. Confirm that the graphic file is located in the **SourceFiles** folder as shown in the sidebar.
3. Confirm that the most recent version of the discipline report is located in the **docCurrent** folder.
4. Insert the appropriate text box in the discipline report where you want the graphic to display (see *Appendices B, C, and D* for instructions).
5. Your firm's editor will link the graphic file to the document.
6. When the document is ready for review, upload the graphic file along with the discipline report (via FTP). (See *Preparing the Document for Review* on Page F-6 for details.)
7. The document author notifies the EA Manager that the graphic file and discipline report have been uploaded.

Note that the graphic file only needs to be uploaded one time unless it is revised.



This view shows the TRIP project Air Quality document folders as an example.

How do I update the Table of Contents?

- To update the Table of Contents, simply press F9 anywhere in the **Table of Contents** (grayed area).
- Select the **Update Entire Table** button. MS Word will generate a revised Table of Contents for you.



- If the document headings have not changed and only the page numbers need to be updated, select **Update page numbers only** in the **Update Table of Contents** window.



How are documents prepared for review?

Once your document is ready to be reviewed, email or upload it (via FTP) to the EA Manager in the requested format (PDF for early pre-draft stages and MS Word with source files for full document reviews). If the document size is more than one (1) megabyte, place the document on an FTP site and email a link to it to the EA Manager. The EA Manager will review the document for quality. If the document is acceptable, the EA Manager will forward a PDF version of the document to the appropriate reviewer(s).

APPENDIX G HOW TO LINK GRAPHICS

The topic of linking graphics is discussed in Section 2 of these Template Procedures. The following instructions should be provided to your firm's editor so that he/she can link the graphics while editing the environmental document before it is submitted to the WSDOT Project Team for review. These procedures will always apply to discipline reports, but also apply to any environmental document, including technical memoranda, with multiple graphics or graphics that require large file sizes.

Using the SourceFiles Folder

At the beginning of your project, you should have been provided with a set of folders that were specifically created for your report. You should have downloaded a main folder with the project name and a standard abbreviation for your specific discipline (see screen capture to the right). That main folder includes subfolders titled **docCurrent**, **Incoming**, **Outgoing** and **SourceFiles**. (See Section 2 *Where do I find the master document and the templates?* for details about the subfolders.)

Your graphics files, which include JPG, EMF and XLS chart files, will always reside in the **SourceFiles** subfolder.

The graphics will be linked inside your MS Word environmental document, which will always reside in the **docCurrent** folder.

Creating and Naming Graphics Files

These Template Procedures include specific information about creating graphics files and how to name those files that will reside in the **SourceFiles** subfolder. The WSDOT Project Team will accept JPG, EMF, and XLS file formats for graphics. For details, see *How do I Create my Graphics?* in Section 2. Also see *Exhibit 2-1: Requirements and Roles for Creating Graphics*.

When your graphics have been created, they will need to be named appropriately. For details, see *How do I Name Graphic Source Files?* in Section 2. Also see *Exhibit 2-2: Graphics File Naming Conventions*.



This screen capture shows the subfolders for the TRIP project Air Quality environmental document.

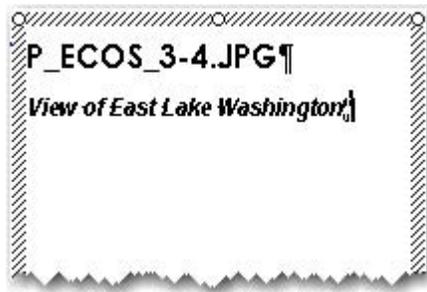
Using the Map Figure, Photo and Chart Templates

As you build your environmental document, you will insert text box placeholders where you want your graphics to display. See *Appendix B, C and D* for instructions on how to insert text box placeholders for photos, charts and map figures. Instructions for linking photos and map figures directly follow. Linking charts requires a different procedure. Details about how to link charts begins on page G-8.

Linking JPG and EMF Graphics

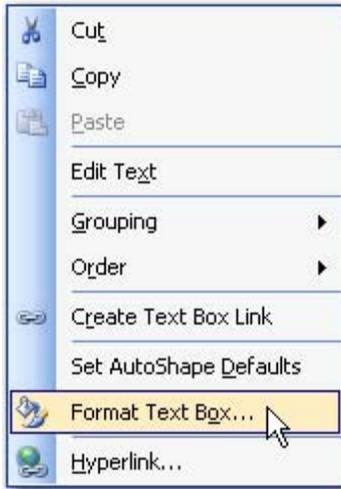
Once the text box placeholders are in the document, your editor can now link the graphics.

1. Find the text box placeholder in the MS Word environmental document for the graphic you want to link.

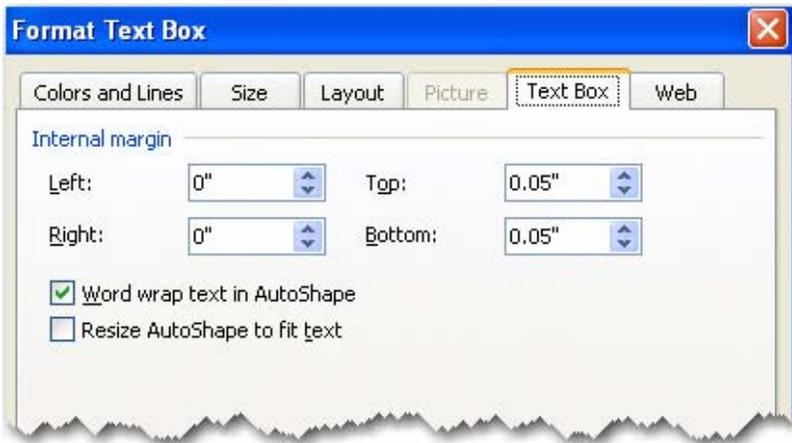


NOTE: Check the text box to make sure the internal margins are set at zero. The templates should be set to zero already, but if you are using an older template, the Internal Margins may be set to .05". If your text box looks different than the example shown above, then proceed with Steps 2 and 3. If your margins are correct, proceed to Step 4.

- Click on the text box border until a four-pointed arrow appears. Right-click and select **Format Text Box**.



- Select the **Text Box** tab. Check that the **Left** and **Right Internal Margins** are set to zero.



Once your text box is ready, you can link the graphic.

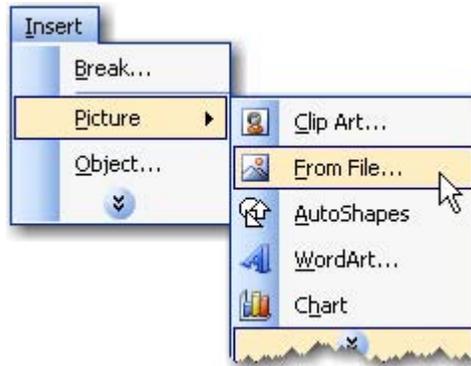


- For photos, place your cursor on the first line inside the text box in front of the graphic name you are going to link (for example, in the text box shown above, you would place your cursor in front of the P). For map figures, the formal Exhibit name and description should be on the first

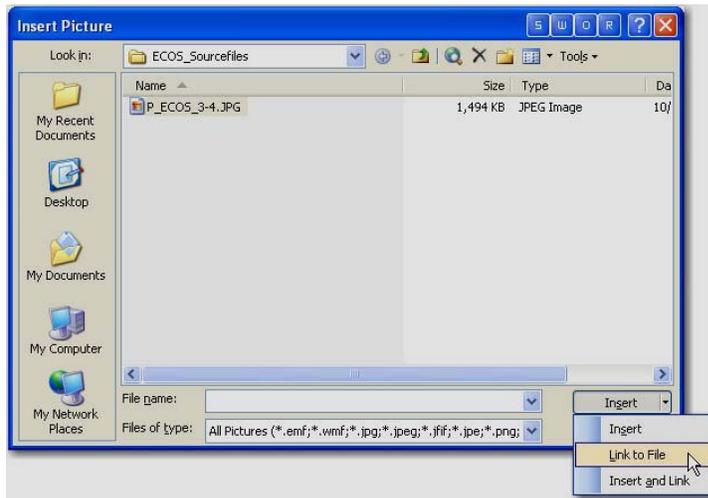
line, and your map figure will display on the next line. For map figures, you will place your cursor at the beginning of the line with the instructions “*Link EMF file on this line.*”

Be sure to follow the instructions inside the map figure text box for aligning the box correctly on the page before you link the graphic.

5. On your toolbar, select **Insert | Picture | From File**.



6. Browse to the **SourceFiles** subfolder and highlight the appropriate graphics file.
7. Click on the down arrow on the **Insert** button.
8. Choose **Link to File**. Always choose this option when linking graphics for a WSDOT environmental document. Short descriptions of the other options follow.



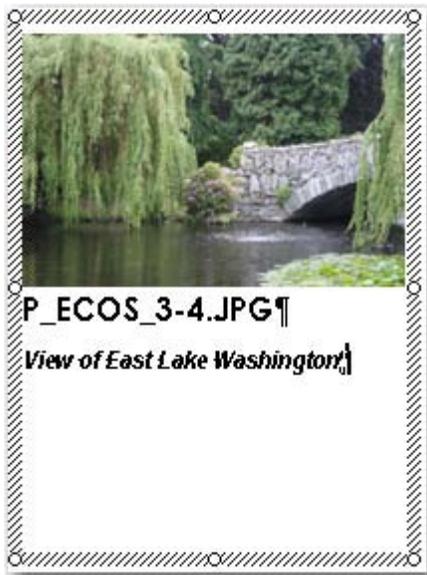
What the Insert choices do:

Insert - embeds the graphic into the document and increases the document file size. If the graphic file is revised, it must be re-inserted.

Link to File - links the graphic with the document, displays the graphic image in the document and does not increase the document file size. If the graphic file is revised, it will display in the document when the link is updated.

Insert and Link - Embeds the graphic and also links the graphic file for cross-reference purposes, and increases the document file size.

After you select **Link to File**, your graphic should display inside the text box.



Cleaning up the Text Box and Graphic

Once your graphic is linked, you'll need to delete any extra text inside the text box, and adjust the length of the text box so there is no extra space after the caption. An example of a clean linked photo graphic is shown below.



Graphic Sizing

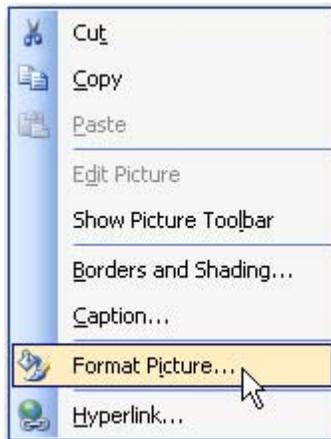
You will also need to make sure the graphic is sized correctly once it has been linked in the document. MS Word does not always display graphics at their original size. You will need to check the sizing to confirm that the graphic has been linked at 100%.

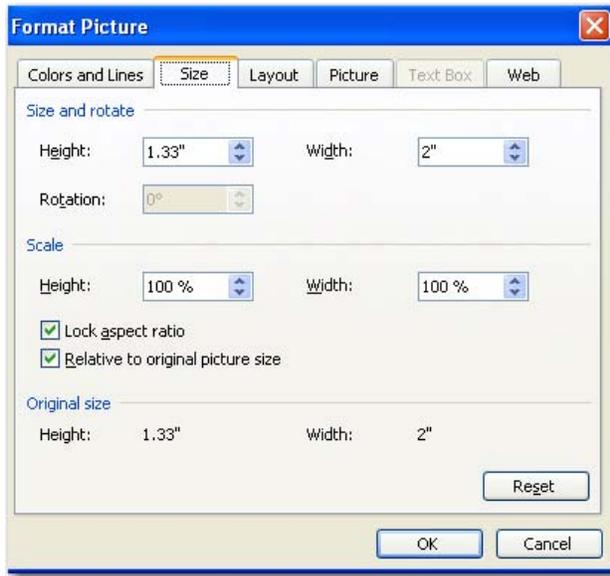
To check the size of the graphic inside the text box:

9. Highlight the graphic image inside the text box.



10. Right-click and select **Format Picture**.



11. Select the **Size** tab.

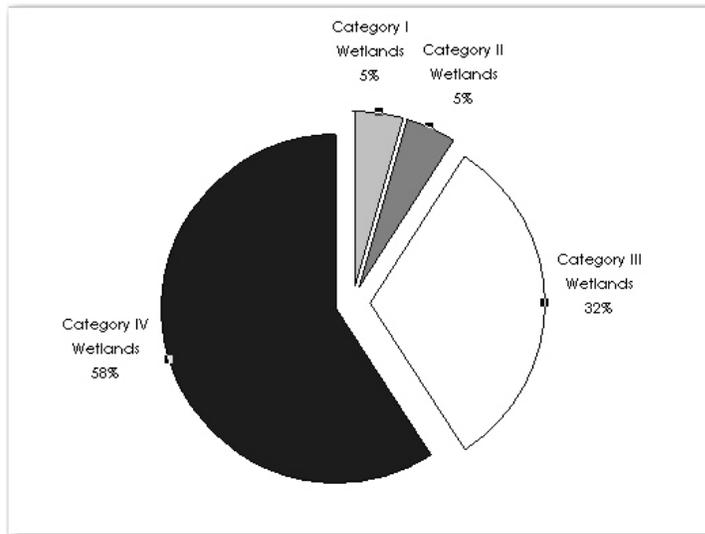
The **Scale Height** and **Width** should be 100%. If the graphic was imported at less than 100%, adjusted the Height and/or Width until they are at 100%.

NOTE: JPG files at 100% should always show a 2.0" width (height can vary). EMF files will vary in size depending on the type of graphic being generated. EMF sizes are provided at the beginning of the project to GIS staff and document authors. The important point is that when the **Scale** is set to 100%, the graphic is fully displayed, is evenly aligned, and fills the inside of the text box.

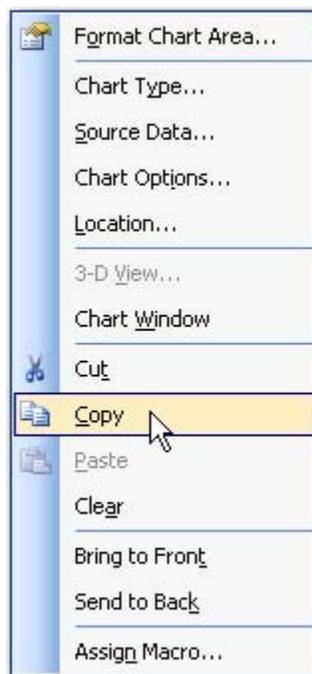
If, when the scale is adjusted to 100%, the graphic is too big to fit inside the text box, contact your graphics person and request that the graphic be sized according to *Exhibit 2-2* and/or the project requirements.

Linking Charts

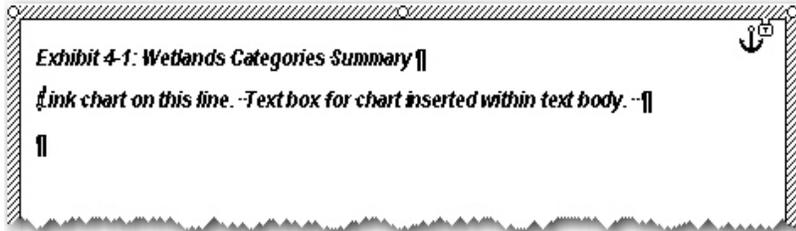
1. Review Page G-1 and confirm that your chart resides in the **SourceFiles** subfolder and is appropriately named.
2. Open the Excel file that contains the chart you want to link to your document.
3. Click on the chart itself (do not include the data next to it) until the entire chart graphic you want to display in the document (including the axis legends) is highlighted.



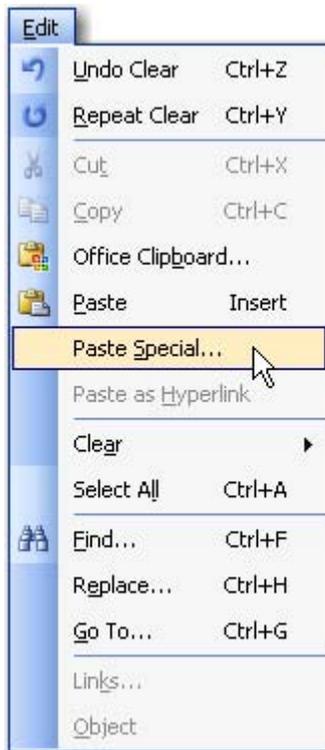
4. Right-click and select **Copy**.



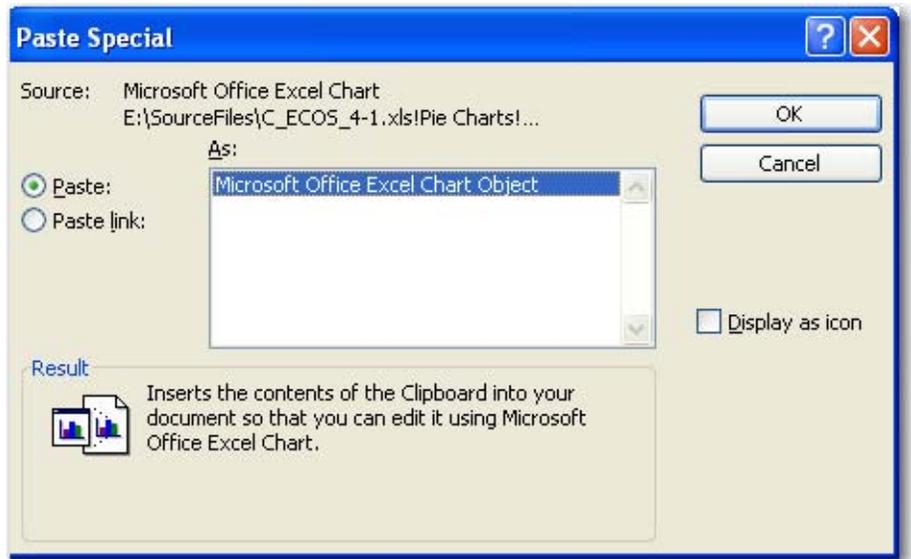
5. Open your MS Word document and locate the chart placeholder text box where you want the chart to display.



6. Place your cursor at the beginning of the line with the instruction "Link chart on this line" (see above example).
7. On the toolbar, select **Edit | Paste Special**.



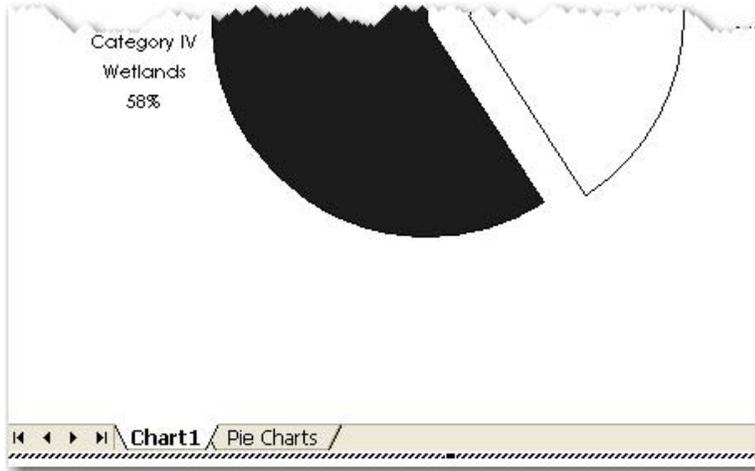
8. In the **Paste Special** window, select the **Paste** button (not Paste Link). The window should show that you are pasting the chart as a Microsoft Office Excel Chart Object. Click **OK**.



9. In the text box where your chart is now displayed, you might need to adjust the text box to show all of your chart or you might need to make changes to the chart itself. You can modify the chart directly from within the text box because it is now linked.

To Modify Charts from Within an MS Word Document

1. Double-click on the chart inside the text box.
2. The chart will be framed and the Excel worksheet tabs will display at the bottom of the chart



3. Make your changes to the chart on the second worksheet, which is where your data resides (in the screen capture above, the second tab is titled *Pie Charts*). You will see the updated chart display on the first worksheet (in the screen capture above, the first tab is titled *Chart 1*). Be sure you are displaying the first worksheet in the MS Word document when you are finished with your changes.
4. Click anywhere outside of the chart, and the revised chart will now display in the MS Word text box in your document.