



Center for Clinical Trials

*Department of Biostatistics  
Department of Epidemiology  
Department of International Health*

*Department of Medicine  
Department of Ophthalmology  
Oncology Center*

Tuesday, 23 August 2005

**Memorandum**

**To:** Center for Clinical Trials Students, Staff, and Faculty  
**Fr:** Curtis Meinert  
**Re:** Tables 101: The Document Master's Oath

Having distributed the Table Maker's Oath and more recently the Table Master's Oath, I suppose there is no surprise in my having discovered yet one more such document – this one for Document Masters. The Document Master, one surmises from way the oath is written, is the Grand Poobah. The Wizard. The Big Boss. The Top Dawg. The Head Babu. The Memsahib.

While again, we have no such designation here, it seems obvious that the producer of the oath comes from a place where such positions exist.

From having produced hundreds of master documents, I am here to say that every one of them is a PITA! You can expect, sometimes even with the simplest of masters, to "hang" the system, sometimes so high that not even Ctrl, Alt, Del gets its attention.

Basically, master documents are made in hell because of "dueling" codes and styles. Codes and settings in one document override codes and settings in subsequent documents.

And paired styles can cause you to lose your religion (especially when the pairing is lost)! Basically, in WP it is the first style in that rules the day. That means that the first style of a given name trumps all other styles of the same name as they come into the master document.

The element in the oath that states "Assemble and generate early and often" is born of the hell of master documents. Just because a document generated flawlessly the last time is no guarantee it will do so the next time.

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But hellish as master documents are, the ability to manage complex documents electronically is an invaluable asset when it comes to document production. The goal of every document master is the LMNH (LookMaNoHands) method of production – a "load and go" system. Just press the button and voila! You have a document ready for the printer! A worthy goal but not easily achieved!

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(Sat 6:43am) 23 Jul 05

\\Tables.101\Master.WPD

Enclosure

The Document Master's Oath

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Tables Notebook  
Chronologic file

## The Document Master's Oath

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### WHEREAS,

Trials require production and maintenance of "living" documents such as protocols, handbooks, manuals, and data collection forms and production of various reports and meeting materials over the course of the trial

Such documents are best seen as master documents in which assembly and generation is done electronically under the control of suitable word processing packages

The goal in assembling and generating any master document is the LookMaNoHands (aka LMNH) mode of operation

That goal can only be achieved by having procedures in place for creating the individual files comprising the master document with formats and settings needed for LMNH assembly and generation

Such uniformity and robustness of settings can be achieved only by proper planning and direction vested in Document Masters who shall:

- 1 Work closely with Table Makers and Table Masters to ensure production of tables compatible with LMNH assembly and generation
- 2 In regard to documents containing study data, arrange and conduct meetings prior to commencing production of such documents to:
  - Establish a freeze date for the database
  - Establish harvest routines consistent with the freeze date
  - Complete a Report Specification Worksheet for the master document
- 3 Organize so the entire document is portrait style
- 4 Produce for one-sided print
- 5 Assemble and generate early and often!
- 6 Print the assembled document periodically over the course of development
- 7 Work with word processing personnel to debug the assembly and generation process to achieve the LMNH mode of production
- 8 Strive to eliminate need for insertions of special materials not compatible with the electronic master
- 9 Print sufficient number of copies so as to have at least three file copies
- 10 Ensure the document has a footer indicating date and path name
- 11 Maintain the electronic file of the document and at least two back-up copies
- 12 Spell check the assembled document during development and again just prior to final production
- 13 Consider stripping the assembled document of unused styles and condensing to save "style lean" files