

# Document Editing, Format & Style



*Hampton*  
VIRGINIA

Hampton City Staff



# Why?

- ✦ Comprehensive effort toward electronic filing/storage
- ✦ Consistent Business Face
- ✦ Information Retrieval
- ✦ Longevity



# Date

- ✦ Lines
- ✦ The date of the document shall be provided on the first page in a clear and inconspicuous location.
- ✦ What about plans, brochures and forms?
- ✦ Business Correspondence Information available on the intranet



# Document Name

- ✦ Must include:
  - ✦ Date
  - ✦ Title
  - ✦ Version if applicable; and
  - ✦ Type of document
- ✦ Ref: Records Manual Appendix G



# Page Number

- ✦ The page number of the document shall be provided in a clear and inconspicuous location
- ✦ Use document header/footer
- ✦ Include total number of pages
  - ✦ Page x of z



# Version or Revision

- ✚ Ensure that the history is intact
- ✚ Plans must include a version number and subsequent date of revision

REVISION	DATE	DESCRIPTION	BY
1	02/13/07	CITY OF HAMPTON COMMENTS DATED 12/13/06	TGU
2	04/19/07	CITY OF HAMPTON COMMENTS DATED 03/13/07	TGU
3	06/02/07	CITY OF HAMPTON COMMENTS DATED 05/24/07	TGU
4	06/20/07	BUILDING CHANGE BY McDONALD'S CORPORATION	TGU
5	07/26/07	CITY OF HAMPTON COMMENTS DATED 07/12/07	TGU



# Forms and Brochures

- ✚ Must include a date or version/revision information
- ✚ When's the last time... ?
  - ✚ You updated your department forms?



# Notations

- ✚ Handwritten notations on documents must be dated if they serve as a permanent record of city business.

# Font



- ✚ Font styles and OCR.
- ✚ Best fonts for a scannable document are those that aren't overly decorative, such as:
  - Times New Roman
  - Arial
  - Helvetica
  - Verdana
  - Tahoma
  - Courier
- ✚ Font Size.



# Background

- ✚ Contrast
- ✚ White, cream or light gray paper.
- ✚ Avoid colored text and paper.
- ✚ Avoid paper larger than 8.5 X 11 inches.



# Formatting Tips

- ✚ Bold
- ✚ Italics
- ✚ Lines
- ✚ Bullets



# Bold

- ✚ Bold
- ✚ Uppercase
- ✚ Character “fattening”
- ✚ Different fonts – same document



# Italics

- ✚ Character skew
- ✚ Underlining and descending characters
  - ✚ Underlining
- ✚ Scannable document format.
  - ✚ White space
  - ✚ Separate headings and paragraphs



# Lines

- ✦ Using Lines
- ✦ Lines to avoid
  - ✦ Avoid short vertical (|) lines and slash marks (/)
  - ✦ Scanners may interpret them as letters, such as a lowercase / or an uppercase I.
  - ✦ Also avoid text leaders or trailers, such as periods (.....).
  - ✦ May confuse scanners or OCR software.



# Bullets

## ✚ Using Bullets

### ✚ Solid - not hollow:

- Bullet one
- Bullet two

### ✚ May also replace them with asterisks (\*) or hyphens (-), plus a space before the text like this:

- \* Bullet one
- Bullet one



# Style Guidelines

- ✚ Contracts
- ✚ Requests for Proposals
- ✚ Page Numbering and Date
- ✚ Confidentiality Notice



# Contracts

- ✦ Contract authors and negotiators shall conform to the standards, requirements and guidelines as provided by the City Attorney's Office.
- ✦ Form/format
- ✦ Insurance requirements
- ✦ Signatory requirements



# Requests for Proposals

- ✦ RFP/RFI authors shall confirm to the standards, requirements and guidelines as provided by Consolidated Procurement.
- ✦ Form/format
- ✦ Specific language
- ✦ RFP/RFI acted as binding document



# Confidentiality Notice

- ✦ A confidentiality notice must appear if appropriate at the bottom of every page of any document deemed confidential. Confidential documents may be retrieved by those in a specific group, but not by users at-large
- ✦ If you work with confidential information, you know who you are.
- ✦ Confidentiality status not determined by staff.

# Resources

## + Records Manager

- + Records Management Manual
- + Records Mgmt Liaison in each Department

## + EDMS Website

<http://cityhall/edm/index.html>

- + PowerPoint Resources
- + Business Correspondence Resources

## + Information Technology

- + Online Training

# Questions?



IT/2008

Document Editing, Format &  
Style

Strategic Area  
Slide 21