Document Editing, Format & Style
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
Must include:

- Date
- Title
- Version if applicable; and
- Type of document

Ref: Records Manual Appendix G
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
Ensure that the history is intact

Plans must include a version number and subsequent date of revision

<table>
<thead>
<tr>
<th>REVISION</th>
<th>DATE</th>
<th>DESCRIPTION</th>
<th>BY</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>02/13/07</td>
<td>CITY OF HAMPTON COMMENTS DATED 12/13/06</td>
<td>TGU</td>
</tr>
<tr>
<td>2</td>
<td>04/19/07</td>
<td>CITY OF HAMPTON COMMENTS DATED 03/13/07</td>
<td>TGU</td>
</tr>
<tr>
<td>3</td>
<td>08/02/07</td>
<td>CITY OF HAMPTON COMMENTS DATED 05/24/07</td>
<td>TGU</td>
</tr>
<tr>
<td>4</td>
<td>08/20/07</td>
<td>BUILDING CHANGE BY MCDONALD’S CORPORATION</td>
<td>TGU</td>
</tr>
<tr>
<td>5</td>
<td>07/26/07</td>
<td>CITY OF HAMPTON COMMENTS DATED 07/12/07</td>
<td>TGU</td>
</tr>
</tbody>
</table>
Must include a date or version/revision information

When’s the last time… ?

You updated your department forms?
Handwritten notations on documents must be dated if they serve as a permanent record of city business.
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
- Uppercase
- Character “fattening”
- Different fonts – same document
• 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 /.
- Also avoid text leaders or trailers, such as periods (....).
- May confuse scanners or OCR software.
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
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
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
    - PowerPoint Resources
    - Business Correspondence Resources

- Information Technology
  - Online Training
Questions?