

No. IT-026	Policy Name: Document Editing and Formatting Standards
Effective Date: 7-1-2011 Last Revised Date: 7-4-2014	Citywide Policy _ IT Policy <u>X</u> IT Procedure <u>X</u>
Approved By: IT Director	

Document Editing and Formatting Standards

Purpose

The following section lists those areas of document creation and formatting that are required for effective and efficient electronic storage of documents. For example, file and folder naming conventions are key to maintaining well-organized electronic directory and drive structures. Naming records consistently, logically and in a predictable way will distinguish similar records from one another at a glance, and by doing so will facilitate the storage and retrieval of records, which will enable users to browse file names more effectively and efficiently. Likewise, dating and page numbering documents, listing version/revision numbers will greatly aid the management and retrieval of electronic records.

Policy

For files destined to become part of the electronic storage system, naming conventions are not an optional tool for staff use, and must be consistently applied and maintained from department to department on a daily basis. The records liaison will ensure appropriate naming conventions are being utilized. For all other files, utilizing the standards will still provide benefits. Dating and page numbering documents, for example, are invaluable in reviewing or discussing documents within teams.

The following elements must be incorporated into all documents, including letters, brochures, forms, memorandum, plans, etc. All document types are included regardless of whether or not they have been specifically listed in this policy.

- Date
- Document Name
- Page Number
- Version Number/Date or Revision Number
- Forms
- Dating of Notations

Procedure

Date: The date of your document must be in a conspicuous location. For letters and memorandum the date must be at the top (Departments should use the templates provided). For other documents, the date should be located in the most commonly accepted location (i.e., the legend located on the right side or bottom right corner for plans and drawings).

Document Name: All documents must be named; this is done regardless of their format or the application used to create them. For files destined to become part of the electronic storage system, the document name must include the elements outlined in Appendix G of the Records Management Manual. These will be the date, title, version if applicable and the type of document. For all other documents, these standards should be followed the greatest extent possible, but at a minimum document titles must be indicative of their content and descriptive enough to be useful. Please refer to Appendix G for more specific information.

Page Number: The consistent application of page numbers will eliminate lost pages or uncertainty with knowing that a document is intact. Page numbers must be located in a conspicuous location, such as the bottom-right or bottom-center of a document. Please use the document header/footer options to maintain consistency with page number format and style. Include total number of pages (i.e., "Page x of z").

Version Number/Date or Revision Number: Document version number and date are essential to ensuring

	McDONALD'S CORPORATION KROC DRIVE, OAK BROOK, ILLINOIS 60521		 <small>THESE DRAWINGS AND SPECIFICATIONS ARE THE PROPERTY OF McDONALD'S CORPORATION AND SHALL NOT BE COPIED OR REPRODUCED WITHOUT THEIR WRITTEN PERMISSION</small>		<table border="1"> <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>06/02/07</td> <td>CITY OF HAMPTON COMMENTS DATED 05/24/07</td> <td>TGU</td> </tr> <tr> <td>4</td> <td>06/20/07</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> <tr> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>			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								
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that the history of specific types of documents is intact and can be traced. Plans must always include a version number and the subsequent date of the revision. More specifically, subsequent versions of plans must include the history of versions and their dates as noted below:

Forms: Should also include a revision number in the lower right hand corner.

Notations: Handwritten notations on documents should also be dated particularly if the document will serve as a permanent record of city business.

The following templates are available for departments and located for download on the city's intranet web site at <http://cityhall.hampton>:

[Business Correspondence Resources \(Letters and Memorandum\)](#)

[PowerPoint Resources for City Council Presenters](#)

Employees may make additional templates available for others by contacting the Records Manager.

[Appendix G](#) provides specific instruction and examples of naming conventions while utilizing the Data Processing Standards provided in [Appendix A](#).

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