# CTPS
# DOCUMENT
# PRODUCTION
# GUIDEBOOK

# NOTES

This guidebook is a tool developed by the Graphics and Editorial teams to walk authors through the graphics and editorial processes and create a document in a CTPS template. It is essential that you start every new document using a current template, whether or not the document will be posted on the website, in order to comply with federal accessibility requirements and maintain CTPS consistency, professionalism, and style. If you need to write a document that does not fit into one of our standard product categories, you should use the general template that incorporates the standard CTPS styles without the formatting specific to the other product types. Simply write your document in the general template and apply the styles properly throughout.

You should always meet with Editorial and Graphics to discuss the format of your document. While all documents begin in the templates, you may want to create a more visually appealing document. It is important to consult with Editorial and Graphics prior to beginning your document to determine which template to use and the budget required for their time.

The instructions in this document are written to be used on a PC with Microsoft Word 365, the Word version being used at CTPS as of 2022. Refer to the software documentation for Word functions and features if using a different version of Word or a Mac.

## CTPS DOCUMENT PRODUCTION GUIDEBOOK CONTENTS

# NOTES

# GETTING TO KNOW THE PROCESS

# RIBBON

Increase/
Decrease Indent

Home Tab   Style Overrides
DO NOT USE!   Bullets/
Numbering

Style
Pane



**Bold** and *Italics*
may be used when
necessary

Line and Paragraph Spacing
(use for bullets that run
longer than one line)

It is the sole responsibility of the author to make sure that their document gets through ALL steps of the document production process.

This includes meeting other groups' deadlines for processing and making sure that your document is posted online in accessible HTML and PDF formats.

Be sure to read through this guidebook to make sure you are formatting your document correctly. Documents that do not meet CTPS's formatting standards will be sent back to the author to be fixed.

A member of the Editorial or Graphics Group will be happy to answer any questions you may have.

## BEFORE YOU BEGIN

Before starting any document, get approval from the Directors and your manager.
See the *Work Scope Accessible-Document Product Process* flowchart in the Appendices.

## PLANNING YOUR DOCUMENT

### How do I determine which template to use?

Most templates are basically self-explanatory. For an agenda, use the appropriate Agenda template; for minutes, select a Minutes or Meeting Summary template. At times, there may be some confusion as to whether a memo should be a report or vice versa. As a general rule of thumb, a memo may not be longer than 25 pages. If your memo exceeds 25 pages, it must be converted into a report. Exceptions are rare but can be made. If you feel your 26-page (or more) document should be submitted as a memo, please talk to someone in the Editorial group. For more information on converting a memo into a report, see page 13.

### Do I need a cover?

If you are writing a report, you will need a cover. Talk to Graphics about creating a cover. Graphics will also provide you with a map for the map page of your report.

### What if I want my document to look a bit different than the template?

When planning your document, you should meet with Editorial and Graphics to discuss the type of document you envision and to determine the budget for their time producing the document. This is particularly important if you would like your report to look different from the report template. For example, you may want to create a document with a different layout than the report style or a guidebook. Because of accessibility guidelines, you will need to create any report content in the template to submit to Editorial. You should meet with members of the Graphics Team and Editorial if you would like something that looks different from the template. Examples of these types of "designed" reports are located on the "Templates" page on the intranet.

If you would like a more creative format, it is essential to start this process during the scoping process to determine the budget required for your document.

## Will I need to update the information on the website?

Talk to the Director of Policy and Planning, Manager of Data Resources, and Manager of Outreach and Communications if you feel that you need to update information on the website.

## How will I arrange for a special announcement when my document is released?

If you would like a special announcement about the release of your document via the website, email, or our Twitter page, please consult Graphics and the Outreach and Communications team.

## Can we still collaborate with our team in Google Docs?

You may still work on a project with your team in Google Docs; however, you must then insert the text into the template before sending it to Editorial. Please note that simply copying and pasting the material into the template will bring over the styles from your work in Google Doc. Please remove all styles before copying the text into a new template. One way to do this is to transfer your text into a text editor such as Notepad, which will strip the styles. You can then transfer your text without styles from Notepad into the template and apply the appropriate styles. Another way is to copy and paste your text into the template, select all of your text and then select Normal from the expanded Styles pane. Then you may need to apply styles such as headers throughout the document.

You can also paste as Keep Text Only under your paste selections. On a Mac, under the paste options, you can use Paste Special and select unformatted text.

## BEFORE YOU BEGIN WRITING

The Editorial Team can walk you through the writing and formatting process before you begin. Contact a member of Editorial to schedule a meeting to discuss formatting your document. In addition, a member of Editorial will be happy to meet with you at any time during the process (e.g., writing or during the editing process) to clarify any editing marks and answer any questions.

# WRITING YOUR DOCUMENT

- You must download a new template every time you begin a new document. Downloading a new template ensures that you are working with the most up-to-date template and guarantees that screen-reading software will be able to follow the document without issue. The date of the latest update is located next to the document on the templates page.

- Download the appropriate template from our CTPS intranet site (https://intranet.ctps.org/templates-home).

- Begin your work in the Microsoft 365 program/application on your computer rather than the browser version, as some of the template features are not available in the browser version.

- Name your document according to the CTPS file-naming protocol. (See *How Should I Name My Document?* on page 10.)

- Write your document according to the standards found in this guidebook and the CTPS Editorial Style Guide located on the intranet.

- Apply appropriate styles throughout your document. (See *How Do I Apply Styles* on page 12.)

- Distribute your draft to all internal reviewers (e.g., group manager, director, etc.) and incorporate any changes from internal reviewers before submitting your document to Editorial.

- Submit your document to Editorial using the EDITORIAL SUBMISSION tool found on our LogMeIn intranet tools' site.

- Review your edited document when returned and either ACCEPT or REJECT edits using Track Changes.

- Maintain version control within the file-naming convention as you work with Editorial. Author versions always end with a number. Editorial versions always end with a letter as shown in the example on the next page.

- Continue the editing process until you and Editorial agree that the document is complete. Editorial will create a Client Review Draft to be reviewed by the client prior to finalizing the document. After the editorial process is complete, Editorial will remove the DRAFT watermark and label your document as FINAL.

# HOW SHOULD I NAME MY DOCUMENT?

All documents must adhere to the following naming protocol shown below:

- There is only one space between characters—no underscores, hyphens (except in date), or any other symbols, unless they occur in the actual document name.

- Use title-style capitalization (not all caps or all lowercase letters).

- Your title must not exceed 60 characters.

- If your initials are the same as another colleague, please provide your first, middle, and last initial or your last name in place of initials to avoid confusion.

| **Author File Name** | **Editor File Name** |
|---|---|
| 2021-10-28 Early-Morning Transit Service MEM JB 1 | 2021-10-28 Early-Morning Transit Service MEM JB 1a |

| 2021-10-28* | Early-Morning Transit Service | MEM | JB | 1,2,3, or FINAL |
|---|---|---|---|---|
| Date Submitted to Editorial | Document Name (Recognizable, descriptive, and brief) | Product Type Suffix (See below) | Author Initials | Version |

*MUST be the same as the date of online submission

| CTPS Product Type Suffixes | | | |
|---|---|---|---|
| ALT = Alternative Text | LTR = Letter | PPT = Presentation | TIP = TIP |
| BRO = Brochure | LGL = Legal Notice | PRR = Press release | TXT = Miscellaneous Text |
| FIG = Figure | LRTP = LRTP | REP = Report | UPWP = UPWP |
| FLY = Flyer | MAP = Map | SCP = Scope | WEB = Web Content |
| JAD = Job Ad | MEM = Memo | TBL = Table | |

# WHAT ARE STYLES AND WHY DO WE NEED THEM?

Various laws and regulations set the standards for the accessibility of electronic media.  CTPS meets these requirements by formatting all text and documents that appear on the MPO's website using MSWord Styles. Styles allow individuals who use a screen reader to navigate documents easily.

Templates have been developed for each of the product types that incorporate the appropriate styles to make the documents both screen-readable for those with a disability and consistent with CTPS's graphical standards.

Styles is a quick formatting tool located on the Home tab of the Ribbon at the top of your Word document. Using a pre-set style automatically changes the formatting of your text. We use Styles to ensure consistent formatting across all our documents and to adhere to CTPS standards for accessibility. Using a different style for headings than for the text in the body of a document is a quick and easy way to provide visual cues for sighted readers and makes it easier for those who navigate documents using screen readers.

The correct application of styles on headers throughout the document builds the table of contents when one is needed. In addition, appropriately applied styles are essential to convert documents into PDF and HTML files that are accessible. By law, CTPS must produce such documents.
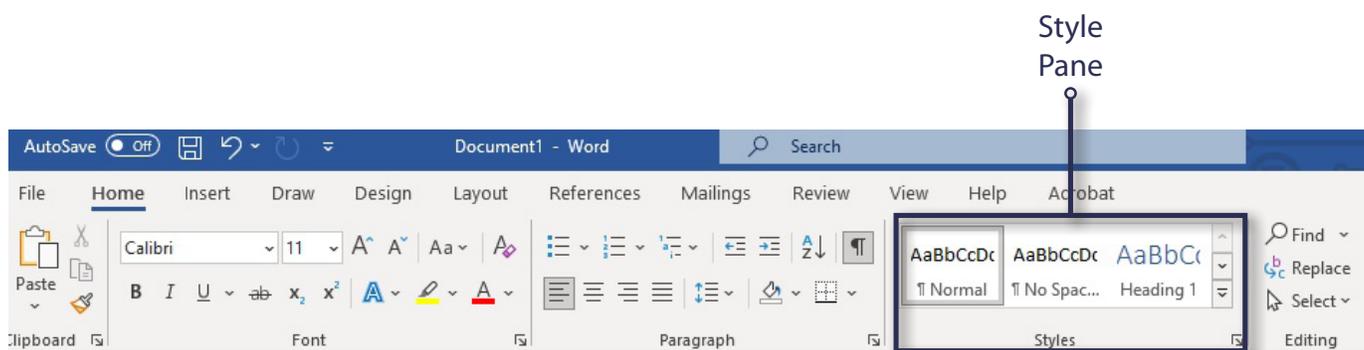
Style
Pane

# HOW DO I APPLY STYLES?

Two clicks: simply place your cursor within a line of text, and then click on the appropriate style. You're done! The style will be applied to the entire line or paragraph. You may apply styles as you write, or you may apply them after you have typed all your text. Text that has not been assigned a specific style will default to the Normal style, so you will only need to apply styles to text that requires additional formatting, such as headings or footnotes.

Once a style is applied, you do not need to format the text further. For example, you will not need to change the indentation, font weight, or spacing before/after a heading manually. You should not insert a blank line (i.e., hit Enter) after a heading style, but you should insert a blank line between paragraphs of text.

It is very important that you do not use the Font tools on the Home tab of the Ribbon that allow you to manually change the font, point size, color, etc. These commands will override the styles, such that you will end up creating more work for yourself and for those who will turn your document into an accessible HTML file.

**Bold** and *Italics* are okay to use on specific words you wish to highlight within your text where appropriate, but do not use them to change the look of your headings or paragraphs of text.

Please contact the Editorial or Graphics group for questions or assistance with your document.

## OTHER STYLE CONSIDERATIONS

**How do I convert my memo into a report?**

**What if the template is updated while I'm in the middle of writing a document?**

**What if I need to update an old report?**

The same process applies in all these situations:

If you have large amounts of text to transfer into a new document, there are some tricks to get it done quickly and efficiently. Download the new/appropriate template and rename the file using the correct naming protocol. Highlight all of the text in your original document then Copy and Paste it into a text editor, such as Notepad, which will clear any styles built into the original document. Paste the content into the new template and apply the styles appropriately. If you are copying from an old template into the new template, you simply Copy and Paste. If the styles are applied correctly in the old template, they will update and reformat automatically.

A memo may not be longer than 25 pages. If your memo exceeds 25 pages, it must be converted into a report. Exceptions are rare but can be made. If you feel your 26-page (or more) memo should be submitted as a memo, please talk to someone in the Editorial group. Turning your memo into a report is as simple as cutting and pasting from your memo into a report template. But there are a few things to keep in mind:

- Section headers will be promoted one number when you switch from memo to report. You will need to reformat all Heading 1 headers into Chapter headings in the report. Heading 2 will become Heading 1 in the report, and so forth.

- All chapter headings should include "Chapter," the chapter number, and the title (for example, "Chapter 1—Shared-Use Mobility").

- Numbering within the report will follow the chapter number. For example, subsections within Chapter 2 will be numbered 2.1, 2.2, 2.3, and so on. Further subsections will follow the subsection number. For example, under subsection 2.1, the sections would be numbered 2.1.1., 2.1.2, 2.1.3, and so on.

## My styles didn't update in the new template, now what?

If your styles didn't automatically update, it means you didn't apply the style correctly, or you used the formatting buttons to override the style. Highlight the incorrectly formatted text and click on the Clear Formatting button found in the expanded Styles panel from the Ribbon in the Home tab, then reapply the appropriate style.

Clear
Formatting
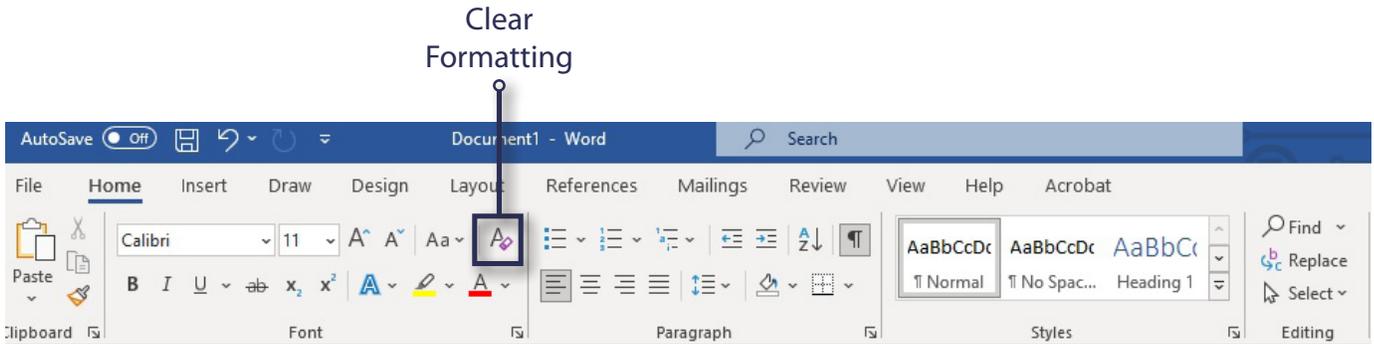


## How Do I Make a Bulleted or Numbered List Using Styles?

Type your list using the Normal style. Highlight the text to be bulleted or numbered, then click on either a Bullets or Numbering button located in the Paragraph group on the Ribbon under the Home tab.

For sub-bullets, highlight the appropriate text and hit the adjacent Increase Indent button. Repeat the process for sub-sub-bullets, etc. The Decrease Indent button will shift the text back a layer. If you have any questions about how your list should be bulleted, please see the Editorial Style Guide or speak with a member of Editorial directly.

Decrease    Increase
Indent       Indent
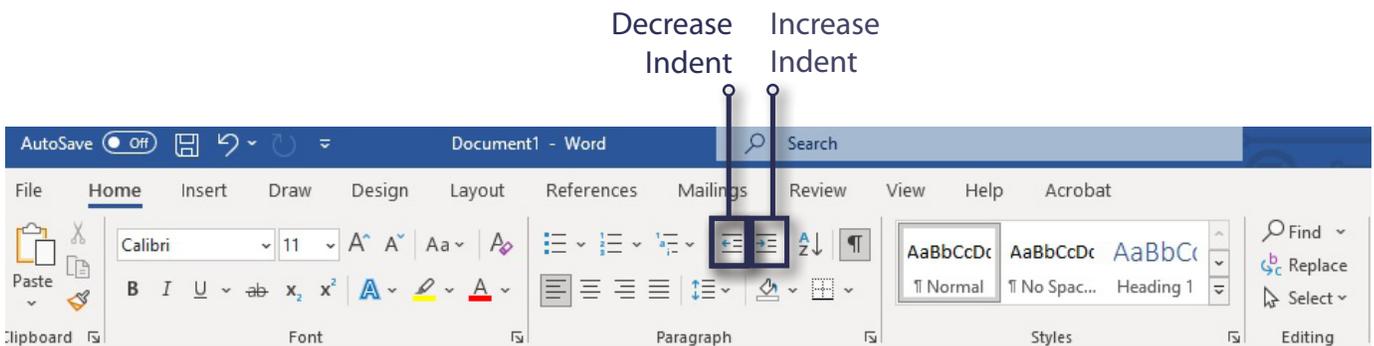
### How Do I Format Tables?

## WORKING WITH GRAPHICS AND ACCESSIBILITY FORMATS

Write your document and apply the correct styles throughout. Once your document is through the editorial process and finalized, send it to Graphics (graphics@ctps.org) to be made into accessible PDF and HTML files. Graphics will notify you when your document is ready for posting on the MPO website. The Graphics group has its own number to charge this work to (Provision of Materials in Accessible Formats) and will not charge your project.

### Can't I just make the PDF file myself?

No. Some versions of Word and/or Adobe Acrobat do not support the creation of Tags, which are necessary for screen readers. There are also several "behind the scenes" steps that Graphics must take to ensure that the PDF meets accessibility standards.

### Word has a "Save as HTML" feature. Can't I just make my HTML that way?

No. Word is NOT a good program for creating HTML files. Creating HTML files directly from Word creates a lot of bugs and coding problems. Graphics has the appropriate software for web coding.

### Can't I save time by giving Graphics the document before the editorial review is finished?

No. Giving Graphics your document before it's finalized will slow down the process. Graphics will only accept files that are FINAL.

### *What if my document has to go through phases before being FINAL?*

We understand that some documents need to go through several phases (i.e., public comment period, MPO approval, etc.). Please consult the Editorial and Graphics groups when you move on to the next phase of your document's production.

## WHAT IS ALT-TEXT AND WHY DO I NEED IT?

Alternative Text (or ALT-Text) is text that is unseen, but that is read by screen readers. It is used for tables and figures/images that a screen reader would otherwise skip over or read only as "image." Authors must write a short one- to two-sentence summary for all tables and figures to comply with CTPS's standards for accessibility. Please see Editorial if you need a sample of ALT-Text.

### What Should I Write as ALT-Text for a Table or Figure?

- A screen reader will continuously read a table left-to-right without pausing or providing context. The most helpful alt-text for a table describes its overall organization. For example, "Individual projects head each row, followed by columns of funding information." For figures, alt-text should include a basic description of what the image or map is displaying.

- Please talk to Graphics to make sure that your table and figures adhere to accessibility standards.

- If, after consulting with the Graphics group, you need to use a complex table, use the following language as your ALT-text:

This is a complex table that has not been optimized for screen-reading software. If you would like to request this data in a different format, please contact the Central Transportation Planning Staff (CTPS) via email at publicinfo@ctps.org.

## POSTING TO THE WEBSITE

When Graphics has completed making the PDF and HTML files of your document, they will email you to let you know the files are ready and to give you the location of the files. You are then responsible for contacting the appropriate department to have your document posted on time.

For MPO meeting materials, Graphics will notify you and will notify you and a member of Certification Activities or Outreach and Communications of the location of the final document. A member of Certification or Outreach and Communications will post the document to the meeting calendar.

For all other website postings, Graphics will notify you directly. You should consult with the Director of Policy and Planning and Data Resources about posting the document. Data Resources will post the document once it has been approved for posting.

## I STILL DON'T UNDERSTAND!

A member of the Graphics or Editorial staff is available to help you with any problems or questions you may have.
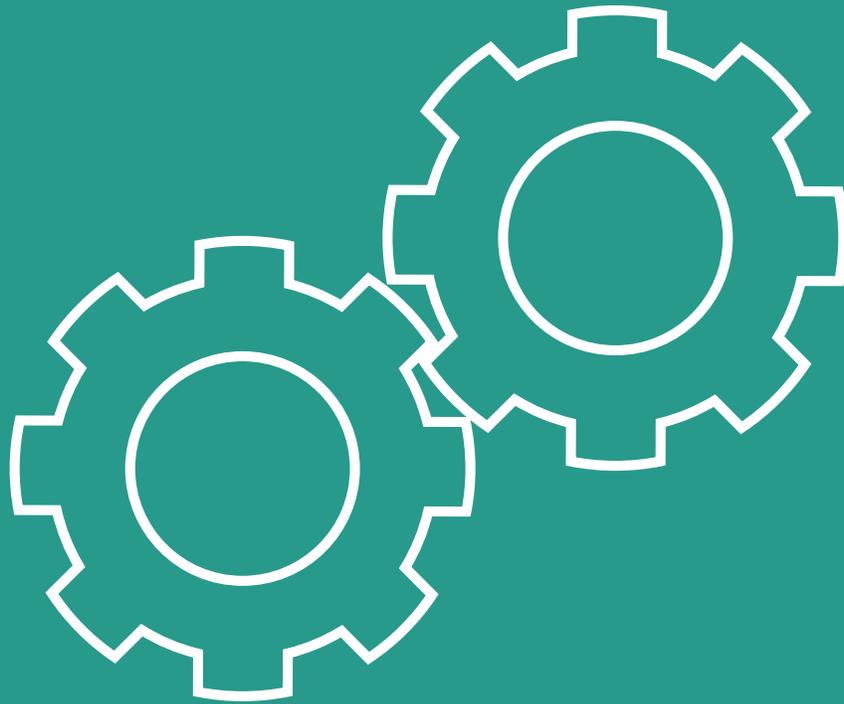
# WORK PLANS AND PROGRAMS

**Starting Out**

**Additional Formatting**

**If Your Project is Related to Another Project**

**Preparation for Editing and Posting**

# COLLABORATIVE PROJECT SCOPE DEVELOPMENT

Project Name  _____

Project Number  _____

Project Manager  _____

Project Principal  _____

Group Manager  _____

## Instructions to project manager

1. Complete the information above.
2. Begin scope development by meeting with staff from other groups who may be contributing to the project. Always include staff from those groups that provide support (Editorial, Graphics, Outreach and Communications, and Data Resources), even if you do not think you will need their services.
3. Develop the project's tasks, estimated person-weeks of work, work products, and schedule in consultation with relevant group managers. Write this information in the template in the following pages and the cost table and schedule in the template exhibit workbook accordingly.
4. Before the first editorial review, complete the top and bottom sections of this form. Be sure to enter additional support groups as required in the Approvals section below.
5. Once Editorial has returned the final version of the work scope to you, submit this form along with the final work scope, cost table, and schedule to the Director of Finance and Operations, who will usher it through DocuSign to obtain the required e-signatures. Each signatory must complete the name and date lines to certify approval. The Director of Finance and Operations will return a copy of the signed form to you.
6. Prior to sending the work scope to Graphics, where the document will be prepared as a PDF and HTML for posting, remove this form.
7. Set aside amounts specified for support group staff in the cost table exhibit and, while tracking project expenditures versus budget, consider the set-asides off-limits for any task other than the intended purpose. In cases where the products were not well-defined during initial project scoping, consult with relevant group managers to revise these amounts once the products are better defined.
8. Your project principal or group manager monitors the project's progress and ensures proper management of this and all other aspects of the project.

If you need help using the template or have any questions, please see someone in the Editorial or Graphics group.

Remember to apply styles throughout your document. Refer to the Getting to Know the Process section of this guidebook to make sure that you are applying them correctly.

As of early 2022, to complete the schedule chart and cost table exhibits, use LogMeIn to connect to the CTPS network, and use a browser to navigate to the abbreviated version of the CTPS Intranet found at http://laputa.ad.ctps.org or through your virtual private network (also known as VPN) as the connectivity software applies to you.

A work plan is a short scope of work that may be used for a project that is funded entirely by an agency or other non-MPO client. Work plans are used only under certain circumstances and/or for specific projects. Work plans may not be used for MPO-funded work and do not require review and approval by the MPO.

A work program is a scope of work that will be reviewed and approved by the MPO, regardless of the funding source. There are two work program templates, one for MPO-funded work and one for agency- or other client-funded work. Always double-check with your group manager and/or director if you are uncertain whether a scope is a work plan or a work program.

## STARTING OUT

- Download the work plan or program template from our intranet site (https://intranet.ctps. org/templates-home) to ensure that you are working with the most up-to-date templates. Rename your document according to the CTPS file-naming protocol. (See *How Should I Name My Document?* on page 10.)

- Change "Boston Region Metropolitan Planning Organization Work Plan (/Program)" found in the Title field of the document Properties to the current title of your document and the current date. To access the Title field, click the File tab at the top of your Word document and select Info in the left navigation. The Title field is to the right under the image of the document and the Properties header. To change the text, click in the field and replace the existing text with your new information.

- The first page of the work scope template, the Collaborative Project Scope Development, should be completed once Editorial has returned the final version of the work scope to you. Submit this form along with the final work scope, cost table, and schedule to the Director of Finance and Operations, who will usher it through DocuSign to obtain the required e-signatures. Each signatory must complete the name and date lines to certify approval. The Director of Finance and Operations will return a copy of the signed form to you. Prior to sending the work scope to Graphics, where the document will be prepared as a PDF and HTML for posting, remove the form.

- Replace all text enclosed in square brackets, including the brackets themselves, with appropriate text, as directed by the text in brackets.

- Add the appropriate information in the header of the second page.

- To ensure consistency, you are required to use the exact format and wording in the work plan/program template. Some exceptions may be made. Talk to your manager if you need to change the wording.

- On the first page of the scope, add information only where the brackets prompt you to do so. Make sure you delete the brackets. It should never be necessary to change the main headings: Do not add or delete headings, reword them, or change their order.

- Send PDF versions of the exhibits to Editorial for review with the scope.

- Send HTML and PDF versions of the exhibits to Graphics when the scope is being finalized for posting.

## ADDITIONAL FORMATTING

- Body text with indentation appropriate to the heading level it appears under may be specified using the style named Normal N, where N is the number of the heading level. In most cases, the proper style will be automatically chosen when you hit the Enter key at the end of the preceding heading.

- For bulleted or numbered lists, type your list using the Normal style. Highlight the text to be bulleted or numbered, then click on either a Bullet or Numbering button located in the Paragraph group on the Ribbon under the Home tab.

- For sub-bullets, highlight the appropriate text and hit the adjacent Increase Indent button. Repeat the process for further indented bullets. The Decrease Indent button will shift the text back a layer.

- For any point(s) in a bulleted or numbered list that is only one line take these steps:

  - Go to the Vertical Line Spacing in the Paragraph group

  - Click on the button and select Remove Space After Paragraph
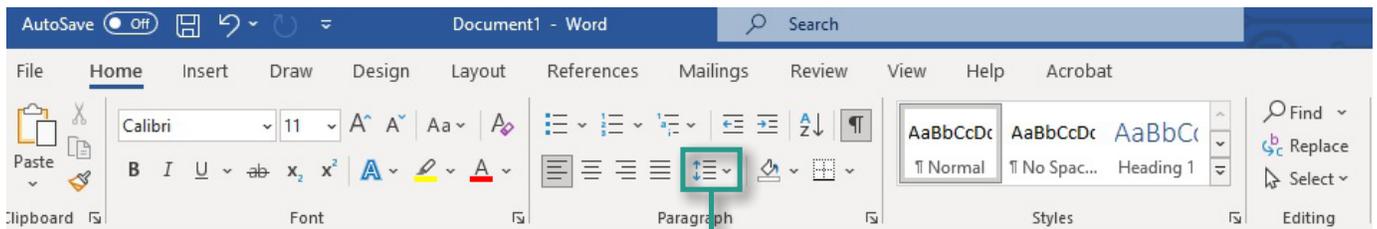


Line and Paragraph Spacing

- Do not change the indentation of the first item in a bulleted or numbered list because this will change the outline level associated with the list and result in confusion when readers use software to read the document aloud.

## IF YOUR PROJECT IS RELATED TO ANOTHER PROJECT

- If your work plan/program closely relates to another project or series of projects, you should (to the extent applicable) use the same basic tasks, list the tasks in the same order, and describe them in the same way.

- Refer to other projects by name and the date of their work plan or work program (do not cite the CTPS project number).

## PREPARATION FOR EDITING AND POSTING

- Make sure that Track Changes is always ON during the editing process of your draft. Editorial will turn off Track Changes when your document is finalized.

- Send your document to Graphics to be converted into a PDF. Be sure to include both PDF and HTML versions of the exhibits.

- For MPO meeting materials, Graphics will notify you and a member of Certification Activities or Outreach and Communications of the location of the final document. A member of Certification Activities or Outreach and Communications will post the document.

- For all other website postings, Graphics will notify you directly. You should consult with the Director of Policy and Planning and Data Resources about posting the document. Data Resources will post the document once it has been approved for posting.

# NOTES
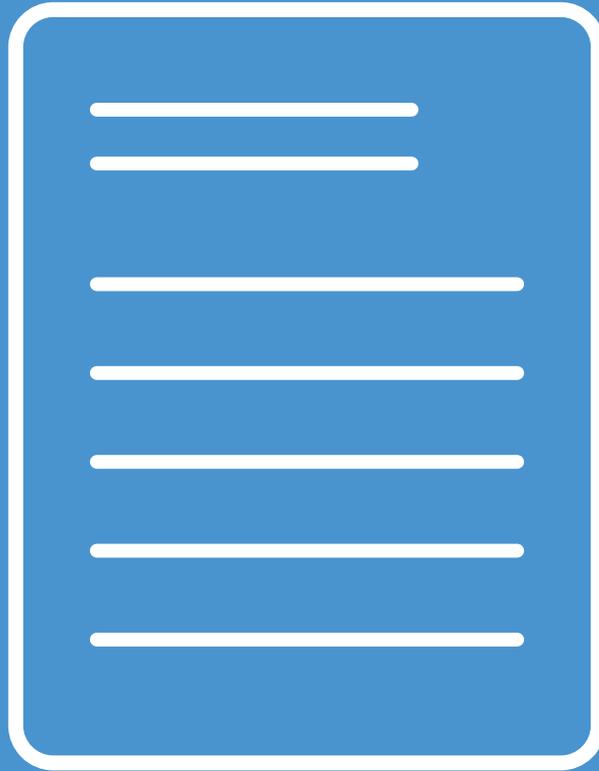
# MEMOS

**Starting Out**

**Additional Formatting**

**Formatting Tables and Figures**

**Adapting Your Memo for General Correspondence**

**Preparation for Editing and Posting**

**TECHNICAL MEMORANDUM**

**DATE:** [Month Day, Year] [Use To/From style]
**TO:** [MassDOT]
**FROM:** [Insert author(s) name(s)]
**RE:** [Insert Title Here, with Title Style Caps as in This Sentence.] Title should not exceed one line.

[Type a summary of your memo in this space, if you wish. Do not use the "RE" line above for that purpose. If you do not use this space for a description, delete this example text and begin your text under Heading 1. Delete the brackets as you replace all text.]

**1 [STYLE: HEADING 1 WITHOUT BRACKETS]**

[Begin writing your document here.]

**1.1 [Style: Heading 2]**

[Continue writing your document here.]

***[Style: Heading 3]***

[Continue writing your document here.]

[Style: Heading 4]
[Continue writing your document here.]

**1.2 [Style: Heading 2]**

[Continue writing your document here.]

**2 [STYLE: HEADING 1]**

[Continue writing your document here.]

**2.1 [Style: Heading 2]**

[Continue writing your document here.]

Civil Rights, nondiscrimination, and accessibility information is on the last page.

> If you need help using the template or have any questions, please see someone in the Editorial or Graphics group.
>
> Remember to apply styles throughout your document. Refer to the Getting to Know the Process section of this guidebook to make sure that you are applying them correctly.

A memo may not be longer than 25 pages. If your memo exceeds 25 pages, it must be converted into a report or receive Director approval. Please refer to the Getting to Know the Process section on page 13 for how to convert a memo to a report.

## STARTING OUT

- Download the Technical Memo Template from our intranet site (https://intranet.ctps.org/templates-home) to ensure that you are working with the most up-to-date template. Rename your document according to the CTPS file-naming protocol. (See *How Should I Name My Document? on page 10*.)

- Change "CTPS Technical Memo" found in the Title field of the document Properties to the current title of your document and the current date. To access the Title field, click the File tab at the top of your Word document and select Info in the left navigation. The Title field is to the right under the image of the document and the Properties header. To change the text, click in the field and replace the existing text with your new information.

- Replace all text within the brackets, including the brackets themselves, with the appropriate text.

- Remember to add your memo's title and the memo's date in the header of the second page. Page numbers in the footer are generated automatically. Graphics and Editorial will take care of any additional formatting, if necessary.

- The title of your memo on the RE line must be one line only.

## ADDITIONAL FORMATTING

- For top level content (i.e., Date, To, From, and Re:), use the To/From style.

- Heading 1 and Heading 2 are preceded by section and subsection numbering, respectively. Heading 3 and Heading 4 are not.

- Headings 5 and 6 are available in the style list, but we discourage using them in memos. Please see Editorial if you think you need them.

- You may insert Page Breaks if you need them. Do not use Section Breaks.

- To insert a footnote, use the Insert Footnote button under the References tab on the Ribbon. Be sure to apply Footnote Text style to your footnote text.

- For any point(s) in a bulleted or numbered list that runs longer than one line, follow these steps:

  ○ Go to the Layout tab on the Ribbon;

  ○ Then go to the Paragraph group in the center;

  ○ Select all bullets except for the final one in the list; and

  ○ Adjust the After spacing to 6pt.

Layout Tab
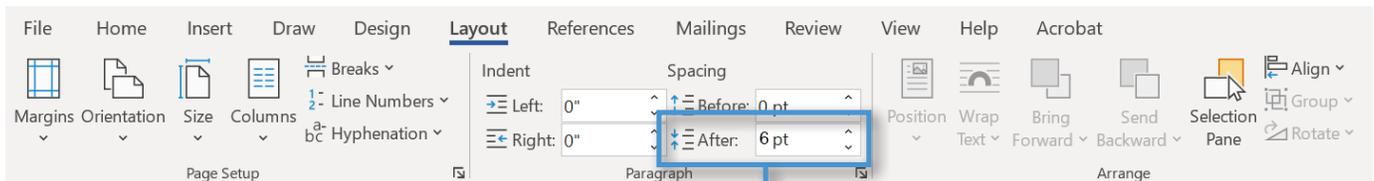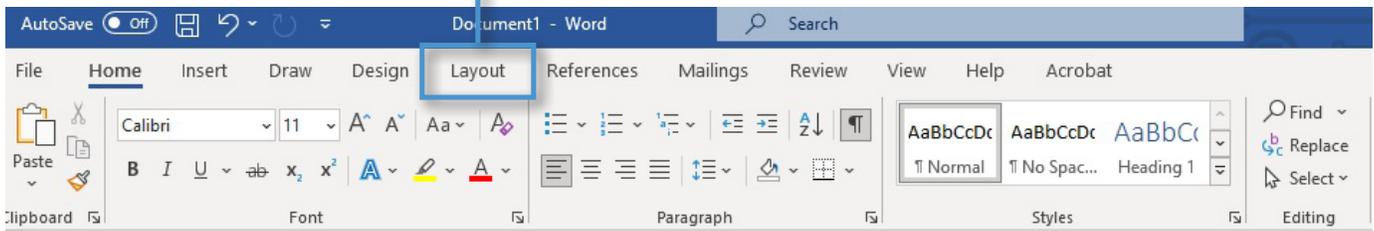


Change to 6pt

# FORMATTING FIGURES AND TABLES

Please consult the Tables and Figures section of this guidebook on page 59 for complete details about how to properly format tables.

- Generate tables in Excel, then insert them into the document using the instructions in the Tables section of this guidebook.

- Use the Figure/Table Title style on the titles of figures and tables. The figure or table number should be on the first line in sentence caps, then the title on the second line. Use soft returns (Shift + Enter) when adding new lines to maintain the formatting. See below for an example:

**Table 1 [Shift+Enter]**
**This is the Title of the Table**

- To create and maintain automatic table and figure numbering, copy the figure or table number and title lines from the template and paste them before each new table or figure that you add. Numbers will not update until you view the document in print preview. Use a soft return [Shift + Enter] after the table title and number to ensure style remains consistent. Like the Table of Contents, table/figure numbers use Quick Parts Field Code, which will allow the user to create an automated numbering system. In order for this to work correctly, the field command must be a part of the text, which is why copying and pasting from the original template table/figure title header (i.e., Table X or Figure X) is important.

- If tables or figures (such as maps or photos) are to be a full page or in a landscape style, create a placeholder page instead of inserting them into the Word document. To create a placeholder page, add a blank page where the table(s) or graphic(s) will be inserted. Do not use section breaks. On this placeholder page, write the title/name of the accompanying file for the page and apply Table/FIgure style. Graphics will insert the table(s) or graphic(s) in the PDF when they prepare it for posting.

- ALT-Text must accompany each figure and table. (See *What is ALT-text and Why Do I Need It? on page 16* for guidance.) Please see Editorial if you would like to have a sample of ALT-Text.

- Citation information that includes a source must accompany every table or figure (unless it is the author's own work that was completed for the memo or report). Source information should be included for tables or figures from other CTPS documents.
  - Use the Figure/Table Citation style for this text. Please see the Tables section of this guidebook for further guidance about proper formatting. See the example below:

    [Notes, if any.]
    [Caption footnotes, if any.]
    [Acronyms and abbreviations, if any.]
    [Source(s): ___.]

     ○ All acronyms and abbreviations used in the table must be defined alphabetically along one line separated by periods (e.g., CTPS = Central Transportation Planning Staff. MAPC = Metropolitan Area Planning Council. MPO = Metropolitan Planning Organization).

## ADAPTING YOUR MEMO FOR GENERAL CORRESPONDENCE

- If you wish to write a short memo for the purposes of general communication, follow the instructions for the Technical Memo with the following adjustments:

- In the document title, delete the word "TECHNICAL" from before "MEMORANDUM."

- On the last page, in the lower left-hand corner, please indicate if you are copying anyone. If so, add carbon copy (cc) lines, as shown in the example below:

    **cc:** **R. Smith, Massport[shift+return]**
          **J. Jones, MBTA**

     ○ Use the shortened form or acronym of any organization name, if available. If the copied recipient has no affiliation, delete the comma following the name.

     ○ Use soft returns (Shift + Enter) when adding new lines to maintain the formatting or hit Tab on subsequent lines for alignment.

     ○ If you are not copying anyone, delete the cc: lines from the template.

- If your memo has appendices, attachments, or enclosures, indicate so on the last page, in the lower left-hand corner or after the cc: lines.

     ○ At the beginning of the memo briefly describe each enclosure; explain why it is included, and, if necessary, how the reader should use it.

     ○ Use "Enclosure" for only one and "Enclosures (N)" for multiple enclosures, where N is the number of items enclosed.

     ○ If you do not have appendices or enclosures, delete the enclosure line from the template.

## PREPARATION FOR EDITING AND POSTING

- Make sure that Track Changes is always turned on during the editing process of your draft. If applicable, Editorial will create a client review draft before finalizing the document. Once any changes have been incorporated, Editorial will turn off Track Changes and remove the watermark when your document is finalized.

- Submit all ALT-Text to Editorial in a separate document either with your document or as soon as possible after submitting. If you need assistance, ask Editorial.

- For MPO meeting materials, Graphics will notify you and a member of Certifications

Activities or Outreach and Communications of the location of the final document. A member of Certifications Activities or Outreach and Communications will post the document.

- For all other website postings, Graphics will notify you directly. You should consult with the Director of Policy and Planning and Data Resources about posting the document. Data Resources will post the document once it has been approved for posting.

# NOTES

# REPORTS

# Chapter 1—Title

## 1.1    [STYLE: HEADING 1]

[Begin writing your document here. Style: Normal]

### 1.1.1   [Style: Heading 2]

[Continue writing your document here.]

#### *[Style: Heading 3]*

[Continue writing your document here.]

##### [Style: Heading 4]

[Continue writing your document here.]

If you need help using the template or have any questions, please see someone in the Editorial or Graphics group.

Remember to apply styles throughout your document. Refer to the Getting to Know the Process section of this guidebook to make sure that you are applying them correctly.

To create a custom document, one that does not follow the look of a standard report template, you should have already met with managers of Editorial and the Graphics team. Documents that are different from the template require additional time and budget to develop.

## STARTING OUT

Download the report template from our intranet site (https://intranet.ctps.org/templates-home) to ensure that you are working with the most up-to-date template. Rename your document according to the CTPS file-naming protocol. (See *How Should I Name My Document?* on page 10.) Page numbers in the footer are applied automatically. Graphics and Editorial will take care of any additional formatting, if necessary.

Change "CTPS Report" found in the Title field of the document Properties to the current title of your document and the current date. To access the Title field, click the File tab at the top of your Word document and select Info in the left navigation. The Title field is to the right under the image of the document and the Properties header. To change the text, click in the field and replace the existing text with your new information.

### Cover

When you begin your report, schedule a time to meet with Graphics to discuss a cover that they will prepare for your report.

### Page 1—Title Page

- Replace all text within the brackets, including the brackets themselves, with the appropriate text. If you are unsure which agency or contract numbers to place on this page, ask your group manager.

- Keep your report title short. If you need to, you may make the subtitle longer and more descriptive.

- After you delete the first page (the placeholder for the cover), this will become Page 1, but numbering won't appear until Page 2 (numbering for the first page is invisible).

- Add your report's title and the report's date in the header.

### Page 2—Map Page

When you meet with Graphics about the cover, also ask them to create a map pertinent to your project. You should meet with Graphics when you begin your report to provide them with sufficient time to create both the map and the cover.

### Page 3—Nondiscrimination Page

Use the text provided in the template.

### Page 4—Abstract

The abstract is a short, stand-alone summary of your report. An abstract should clearly and briefly identify the purpose, problem, methods, results (if any), and a conclusion. Your abstract will be used as the summary text that accompanies your report on the website.

### Page 5—Table of Contents

You are not responsible for creating the table of contents. Editorial will manage and update this page for you at the end of the editing process. Appendices, though listed here, should be generated and compiled in a separate document.

### Page 6—Executive Summary

The executive summary should provide a clear and concise (generally not more than a few pages) overview of what the report is about and why it was done, what is most important or unique about the report, and the report's primary findings and recommendations.

## FORMATTING THE MAIN DOCUMENT

- New chapters always begin on a new page, and on an odd page. Insert a Page Break at the end of each chapter (never use Section Breaks.)

- Formatting of table of contents, chapters, and pagination will be handled during the final round of editing.

- Heading 1 and Heading 2 are preceded by section and subsection numbering, respectively. The remaining five headings are not.

- Numbering within the Report will follow the chapter number. For example, a subsection within Chapter 1 will be 1.1. Any further subsections will add another number (for example, 1.1.1). The first number will ALWAYS be the same as the chapter number, and the second number will be the subsection number.

- For purposes of organization and HTML conversion, use as few heading levels as possible.

- You may insert Page Breaks if you need them. Do not use Section Breaks.

- To insert a footnote, use the Insert Footnote button under the References tab on the Ribbon. Be sure to apply Footnote Text style for your footnote text.

- For any point(s) in a bulleted or numbered list that runs longer than one line, take these steps:

  - Go to the Layout tab on the Ribbon;

  - Then go to the Paragraph group in the center;

  - Select all bullets except for the final one in the list; and

  - Adjust the After spacing to 6pt.

Layout Tab



Change to 6pt
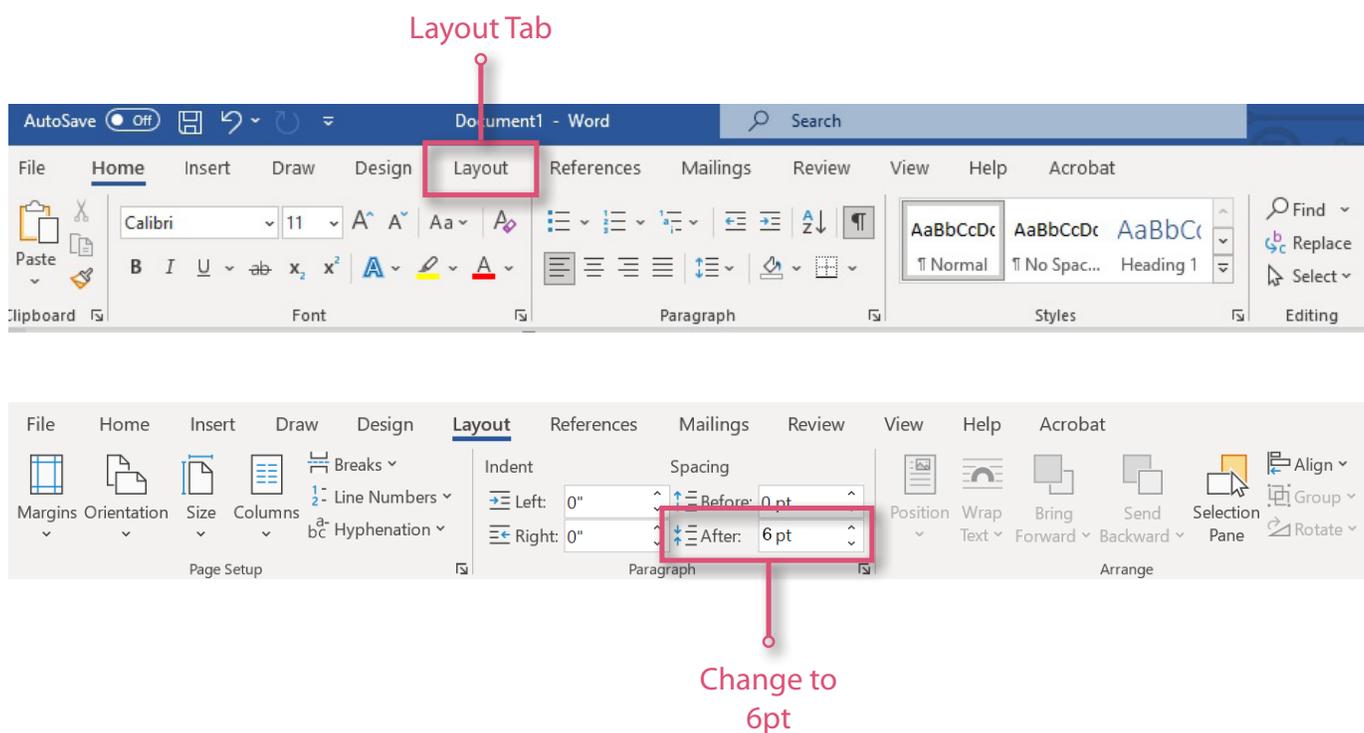
Please see the Editorial group if you have any questions.

# FORMATTING FIGURES AND TABLES

Please consult the Tables and Figures section of this guidebook on page 59 for complete details about proper formatting.

- Generate ALL tables in Excel, then insert them into the document using the instructions in the Tables section of this guidebook.

- Use the Figure/Table Title style on the titles of figures and tables. The figure or table number should be on the first line in sentence caps, then the title on the second line. Use soft returns (Shift + Enter) when adding new lines to maintain the formatting. See below for an example:

**Table 1 [Shift+Enter]**
**This is the Title of the Table**

- To create and maintain automatic table and figure numbering, copy the figure or table number and title lines from the template and paste them before each new table or figure that you add. Numbers will not update until you view the print preview. Use a soft return [Shift + Enter] after Table and number to ensure style remains consistent. Like Table of Contents, table/figure numbers use Quick Parts Field Code, which will allow the user to create an automated numbering system. In order for this to work correctly, the field command must be a part of the text, which is why copying and pasting from the original template table/figure title header (i.e., Table X or Figure X) is important.

- If tables or figures (such as maps or photos) are full page, create a placeholder page instead of inserting them into the Word document. To create a placeholder page, add a blank page where the table(s) or graphic(s) will be inserted. DO NOT use section breaks. On this placeholder page, write the title/name of the accompanying file for the page and apply Table/FIgure style. Graphics will insert the table(s) or graphic(s) in the PDF when they prepare it for posting.

- ALT-Text must accompany each figure and table. (See *What is ALT-text and Why Do I Need It? on page 16* for guidance.) Please see Editorial if you would like to have a sample of ALT-Text.

- Citation information that includes a source must accompany every table (unless the table is the author's own work that was done for the report). Source information should be included for tables from other CTPS documents.

  - Use the Figure/Table Citation style for this text. Please see the Tables section of this guidebook for further guidance about proper formatting. See the example below:

    [Notes, if any.]
    [Caption footnotes, if any.]
    [Acronyms and abbreviations, if any.]
    [Source(s): ____.]

  - All acronyms and abbreviations used in the table must be defined alphabetically along one line separated by periods (e.g., CTPS = Central Transportation Planning Staff. MAPC = Metropolitan Area Planning Council. MPO = Metropolitan Planning Organization.)

# CONVERTING A MEMO INTO A REPORT

A memo may not be longer than 25 pages. If your memo exceeds 25 pages, it must be converted into a report. Exceptions are rare but can be made. If you feel your 26-page (or more) memo should be submitted as a memo, please talk to someone in the Editorial group. You may also need Director approval. Turning your memo into a report is as simple as cutting and pasting from your memo into a report template. But there are a few things to keep in mind:

- Section headers will be promoted one number when you switch from memo to report. You will need to reformat all Heading 1 headers into Chapter headings in the report. Heading 2 will become Heading 1 in the report, and so forth.

- All chapter headings should include "Chapter," the chapter number, and the title (for example, "Chapter 1—Shared-Use Mobility").

- Numbering within the report will follow the chapter number. For example, subsections within Chapter 2 will be numbered 2.1, 2.2, 2.3, and so on. Further subsections will follow the subsection number. For example, under subsection 2.1, the sections would be numbered 2.1.1., 2.1.2, 2.1.3, and so on.

# PREPARATION FOR EDITING AND POSTING

- Make sure that Track Changes is always turn on during the editing process of your draft. If applicable, Editorial will create a client review draft before finalizing the document. Once any changes have been incorporated, Editorial will turn off Track Changes when your document is finalized.

- Submit all ALT-Text to Editorial in a separate document either with your document or as soon as possible after submitting. If you need assistance, ask Editorial.

- For MPO meeting materials, Graphics will notify you and a member of Certification Activities or Outreach and Communications of the location of the final document. A member of Certification Activities or Outreach and Communications will post the document. For all other website postings, Graphics will notify you directly. You should consult with the Director of Policy and Planning and Data Resources about posting the document. Data Resources will post the document once it has been approved for posting.

# NOTES

# MEETING AGENDAS

**Starting Out**

**Creating Your Agenda**

**Preparation for Editing and Posting**

**Agenda Types on the Templates Page**

**NOTE: If you require any accommodations in order to participate or experience technical difficulties during the meeting, please contact Róisín Foley, MPO Staff, at rfoley@ctps.org or 857.702.3704.**

Agenda posted before [H:MM AM/PM], [Month Day, Year]

**Metropolitan Planning Organization Meeting**

**Transportation Board Room, 2nd Floor, 10 Park Plaza, Boston, MA**
**[Meeting Date Month Day, Year], [Meeting Time H:MM AM/PM]** (Estimated duration: [#] hours and [#] minutes, expected ending at [H:MM AM/PM])

Please note:    [This note may be omitted if unnecessary.] This meeting will be [followed by] [preceded by] a [Unified Planning Work Program Committee] [Congestion Management Process Committee] meeting beginning at approximately [H:MM AM/PM].

**Zoom Video Conferencing Platform: https://us02web.zoom.us/j/81334914962**

**To connect via phone, dial one of the toll-free phone numbers 877.853.5257 or 888.475.4499; follow the prompts to enter the meeting ID. The Meeting ID is [Enter number here. It will be the same number as the digits at the end of the URL].**

## Meeting Agenda

1. **Introductions,** 5 minutes
2. **Public Comments,** 10 minutes
3. **Chair's Report,** 5 minutes
4. **Committee Chairs' Reports,** 5 minutes
5. **Regional Transportation Advisory Council Report,** 5 minutes
6. **Executive Director's Report,** 5 minutes
7. **Action Item: [Item,]** [Presenter, Title:] [Brief description….], [#] minutes [(posted) or (to be posted)]
8. **[Item,]** [Presenter, Title:] [Brief description…], [#] minutes [(posted) or (to be posted)]
9. **[Item,]** [Presenter, Title:] [Brief description…], [#] minutes [(posted) or (to be posted)]

**Civil Rights, nondiscrimination, and accessibility information is on page 3.**

If you need help using the template or have any questions, please see someone in the Editorial or Graphics group.

Remember to apply styles throughout your document. Refer to the Getting to Know the Process section of this guidebook to make sure that you are applying them correctly.

Editorial can make changes to the Agenda template based on committee requests. Please reach out to Editorial if you have any changes that need to be made to your particular committee agenda.

## STARTING OUT

- Download the appropriate meeting agenda template from our intranet site (https://intranet.ctps.org/templates-home) to ensure that you are working with the most up-to-date template. Rename your document according to the CTPS file-naming protocol. (See *How Should I Name My Document?* on page 10.)

- Change "Meeting Agenda" found in the Title field of the document Properties to the current title of your document and the current meeting date. To access the Title field, click the File tab at the top of your Word document and select Info in the left navigation. The Title field is to the right under the image of the document and the Properties header. To change the text, click in the field and replace the existing text with your new information.

- Replace all text enclosed in square brackets, including the brackets themselves, with appropriate text, as directed by the text in brackets.

- Although the meeting agenda items may be changed in numbers 1 through 6, they are typical to all agenda so they are provided in the template as real text. Delete or change the items as necessary.

- Use the exact format and wording shown in the template agenda whenever possible.

- So that CTPS's agendas won't contain unnecessary inconsistencies, do not change the template except if absolutely necessary to make it work for your meeting. It should never be necessary to change the main headings: do not add or delete headings, reword them, or change their order.

- When creating the PDF, insert the MPO letterhead watermark.

- If you need hard copies to hand out, print as a two-sided document.

## CREATING YOUR AGENDA

- For virtual meetings, change the name, phone number, and email of the person that will be serving as the technology contact. This information is found in the red text at the top.

- Replace the location as necessary; make sure you list the correct conference rooms for in-person meetings.

- You must include a time estimate with each agenda item.

- All agenda items following the Executive Director's Report (beginning with item 7) must be attributed to a person, with the person's title following. Select the person's name and title and apply the Agendum Presenter style. Select any descriptive text following the agenda heading and apply the Agendum Description style.

- If any of your agenda items focus on a document, you must indicate in the description whether or not the document has been posted on the website or is to be posted in the future.

- If any items on the agenda will be action items requiring a vote by the board or committee, list the topic under the header "Action Item."

- Meeting Minutes and Members' Items both appear in the template. These are regular items on the MPO meeting agenda and appear as they will be listed. If these items are not relevant to your meeting, you may delete them. Change any other text on the template as necessary for your agenda.

- Do not delete the blank line at the end of the agenda template. This line anchors the disclaimer information that appears at the bottom of the page.

- For bulleted lists, use the Bullet button under the Home tab on the Ribbon. You will need to remove space between the items in the list. Follow the directions below to remove the space:

  - Select your bulleted text

  - Go to the Vertical Line Spacing in the Paragraph group

  - To remove space, click on the button and select Remove Space After Paragraph



Select → Remove Space After Paragraph
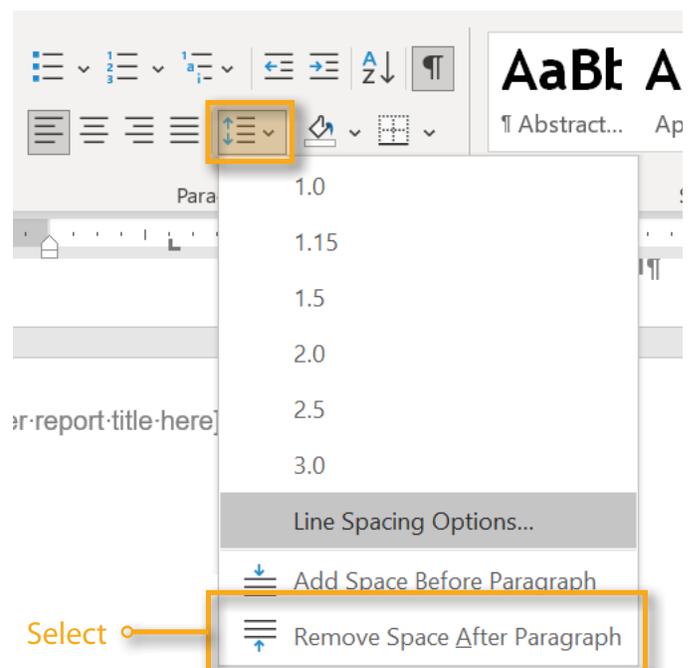
Choose the Numbered style for numbered lists. These lists are multi-level lists, which mean that if you increase the indentation (hit the Tab key at the start of the line); the numbered style will change accordingly to help differentiate the levels.

## PREPARATION FOR EDITING AND POSTING

- Make sure that Track Changes is always turned on during the editing process of your draft. If applicable, Editorial will create a client review draft before finalizing the document. Once any changes have been incorporated, Editorial will turn off Track Changes and watermark when your document is finalized.

- In some cases, a member of Certification Activities or Outreach and Communications can create their own HTML and PDF of agendas and post them to the calendar. In such cases, to create the most standards-compliant HTML, Word documents should be saved as type "Web Page, filtered" with the encoding set to "Unicode (UTF-8)" (look under the "Web options…" choice of the Tools menu in the "Save As" dialog window).

## AGENDA TYPES ON THE TEMPLATES PAGE

- MPO
- UPWP
- Advisory Council
- Administration and Finance

# NOTES

# MEETING MINUTES

**Starting Out**

**Creating Your Meeting Minutes**

**Preparation for Editing and Posting**

**Meeting Minute Types on the Templates Page**

## MPO Meeting Minutes
## Draft Memorandum for the Record
## Boston Region Metropolitan Planning Organization Meeting

**[Month Day, Year], Meeting**
10:00 AM–[12:45 PM], Zoom Video Conferencing Platform

[David Mohler or Steve Woelfel], Chair, representing Jamey Tesler, Secretary of Transportation and Chief Executive Officer of the Massachusetts Department of Transportation (MassDOT)

## Decisions

The Boston Region Metropolitan Planning Organization (MPO) agreed to the following:

- [Insert Text Here] Example: Approve the minutes of the meeting of Month Day, Year
- [Insert Text Here] Example: Approve the work program for…

## Meeting Agenda

### 1. Introductions
See attendance on page…

### 2. Public Comments
[Insert Text Here]

### 3. Chair's Report—*David Mohler, MassDOT*
There was none.

### 4. Committee Chairs' Reports
There were none.

### 5. Regional Transportation Advisory Council Report—*Lenard Diggins, Chair, Regional Transportation Advisory Council*
[Insert Text Here]

### 6. Executive Director's Report—*Tegin Teich, Executive Director, Central Transportation Planning Staff*
[Insert Text Here]

If you need help using the template or have any questions, please see someone in the Editorial or Graphics group.

Remember to apply styles throughout your document. Refer to the Getting to Know the Process section of this guidebook to make sure that you are applying them correctly.

## STARTING OUT

- Download the meeting minutes template from our intranet site (https://intranet.ctps.org/templates-home) to ensure that you are working with the most up-to-date template. Rename your document according to the CTPS file-naming protocol. (See *How Should I Name My Document?* on page 10.)

- Replace all text enclosed in square brackets, including the brackets themselves, with appropriate text.

- Use the exact format and wording shown in the minutes template whenever possible.

- So that CTPS's meeting minutes won't contain unnecessary inconsistencies, don't change the template except if absolutely necessary to make it work for your minutes. Never change the main headings: don't add or delete any, reword them, or change the order.

- Do not change the font used in the template, which is Arial for the body text and Trebuchet for the headings. Point size varies within the meeting minutes template and should not be changed.

- Change "Meeting Minutes" found in the Title field of the document Properties to the current title of your document and the current meeting date. To access the Title field, click the File tab at the top of your Word document and select Info in the left navigation. The Title field is to the right under the image of the document and the Properties header. To change the text, click in the field and replace the existing text with your new information.

## CREATING YOUR MEETING MINUTES

- In the [Month Day, Year] brackets, enter the date of the meeting and delete the brackets.

- Add the date in the header at the top of the second page.

- Change the start and end time as appropriate.

- Make sure the entire location is correct, including the building, room, and address. If the meeting took place virtually, please state that instead.

- Below the date, fill in the name of the presiding chairperson.

- Under Decisions, list the decisions or vote outcomes from the meeting. The names of any work scopes should be in italics.

- The Heading 2 style, which provides automatic numbering, should be used for each agenda item.

- Some of the items on the template under the Meeting Agenda heading are typical components of the MPO meeting minutes. Delete any that are not relevant to your particular meeting. These items include the following:

  - Public Comments

  - Chair's Report

  - Committee Chairs' Reports

  - Regional Transportation Advisory Council Report

  - Executive Director's Report

  - Members' Items

- For the Chair's Report and the Committee Chairs' Reports, insert report information as appropriate. If no information was reported, write "There was none" under the Chair's Report header and "There were none" under the Committee Chairs' Reports header.

- Following the reports, use items from the original agenda (minus the time estimate) as heading text. The subject matter appears first, followed by an em dash (type two hyphens and the next word (no spaces), and Word will substitute an em dash automatically), then the presenter, title, and organization. Apply the Meeting Presenter style to the presenter, title, and organization.

- You should use subheads to break up agenda items that contain a lot of text.  Use the Heading 3 style for subheads within agenda items.

- If you need columns of text to present data, use a table to do so. See the instructions on creating a table below.

- If you need to create a table, go to the Insert tab and insert a table using the Table function dropdown.

  - Under the Design tab in Table  Tools, select the first of the table designs from the Table Design ribbon. This is the CTPS Basic Table (it should be first of the table style illustrations—hover over it to view the name in the tool tip).

  - Check the Total Row box in the Table Style Options group of the ribbon.

  - In the Table Layout ribbon, choose Properties. In the Table tab, choose Centered Alignment. In the Column tab, uncheck the Preferred width option for each column.

  - If your columns contain numbers, you may have to manually set those cells to be right justified.

- For bulleted or numbered lists, use the Bullet or Number button under the Home tab on the Ribbon. You will need to remove space between the items in the list. Follow the directions below to remove the space:

    - Select all but the last item of your bulleted text

    - Go to the Vertical Line Spacing in the Paragraph group in the Home tab.

    - To remove space, click on the button and select Remove Space After Paragraph
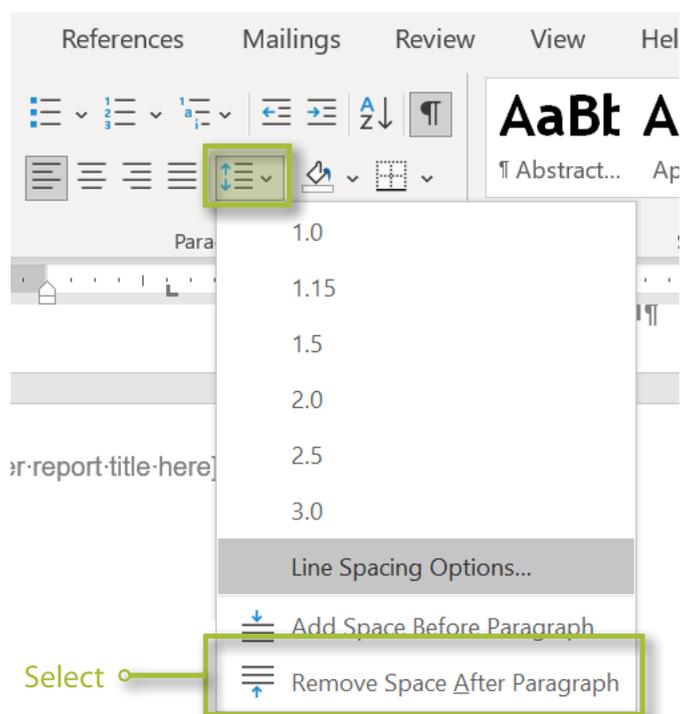


- Under Adjourn, replace the information in brackets with the names and affiliations of the members who made and seconded the motion to adjourn.

- Attendees should be added at the end of the minutes; make sure to check the spelling and affiliations.

## PREPARATION FOR EDITING AND POSTING

- Make sure that Track Changes is always ON during the editing process of your draft. If applicable, Editorial will create a client review draft before finalizing the document. Once any changes have been incorporated, Editorial will turn off Track Changes and remove the watermark when finalized.

- In some cases, a member of Certification Activities or Outreach and Communications staff can create their own HTML and PDF of agendas and post them to the calendar. In such cases, to create the most standards-compliant HTML, Word documents should be saved as type "Web Page, filtered" with the encoding set to "Unicode (UTF-8)" (look under the "Web options..." choice of the Tools menu in the "Save As" dialog window).

## MEETING MINUTE TYPES ON THE TEMPLATES PAGE

- MPO

- UPWP

- RTAC

# OTHER PRODUCTS

**General Purpose/Large Print**

**Letters**

**Job Ads**

# HEADING 1

[Write text here]

## Heading 2

[Write text here]

### Heading 3

[Write text here]

#### Heading 4

[Write text here]

# GENERAL PURPOSE

If you need help using the template or have any questions, please see someone in the Editorial or Graphics group.

Remember to apply styles throughout your document. Refer to the Getting to Know the Process section of this guidebook to make sure that you are applying them correctly.

## STARTING OUT

Download the appropriate template from our CTPS intranet site (https://intranet.ctps.org/templates-home) to ensure that you are working with the most up-to-date template. Rename your document according to the CTPS file-naming protocol. (See *How Should I Name My Document? on page 10*.)

Change "CTPS Document" found in the Title field of the document Properties to the current title of your document and the current date. To access the Title field, click the File tab at the top of your Word document and select Info in the left navigation. The Title field is to the right under the image of the document and the Properties header. To change the text, click in the field and replace the existing text with your new information.

## WHAT IS THE GENERAL PURPOSE TEMPLATE FOR?

Occasionally, you may need to create a document that doesn't fit any of the document templates. It is best always to use CTPS styles, even if your document may never need to be made accessible. By using the general purpose template, you can easily incorporate the text into any of the other CTPS templates in the future if the need arises. To use, simply write your document and apply the appropriate styles throughout. Ask Editorial if you are not sure of the correct template to use.

## DO I HAVE TO USE A TEMPLATE FOR EVERY DOCUMENT I CREATE?

Yes. You must download a new template every time you begin a new document. Downloading a new template ensures that you are working with the most up-to-date template and guarantees that screen-reading software will be able to follow the document.

## HOW DO I USE THE LARGE PRINT TEMPLATE?

To convert a document into large-print format, Copy and Paste the text into the Large Print template. If you applied the styles correctly, they will reformat to large text automatically.

[Month Day, Year]


[Mr./Ms./Dr./Honorable/etc.] [Recipient's full name]
[Position or Role], [Company or Organization]
[Street Address]
[City or Town], [State name (not abbreviation)]  [ZIP code]


Re: [Subject with Caps as in This Example]


Dear [Mr./Ms./Dr./Honorable/etc.] [Recipient's last name]:

[Write letter here. Style: Normal]

[Continue letter here. Style: Normal]

[Continue letter here. Style: Normal]

[Continue letter here. Style: Normal]

[Continue letter here. Style: Normal]

Sincerely,



[Your First Name] [Your Middle Initial] [Your Last Name]
[Your Role or Position]
[Your Group's Name or the Agency Name]


Enclosure [OR] Enclosures [N]


cc:    [First Initial] [Last Name], [Organization abbreviated][Shift+Enter]
        [First Initial] [Last Name], [Organization, abbreviated]

# LETTERS

If you need help using the template or have any questions, please see someone in the Editorial or Graphics group.

Remember to apply styles throughout your document. Refer to the Getting to Know the Process section of this guidebook to make sure that you are applying them correctly.

## USING THE LETTER TEMPLATE

- Download the letter template from our intranet site (https://intranet.ctps.org/templates-home) to ensure that you are working with the most up-to-date template. Rename your document according to the CTPS file-naming protocol. (See *How Should I Name My Document?* on page 10.)

- Change "Letter" found in the Title field of the document Properties to the current title of your document and the current date. To access the Title field, click the File tab at the top of your Word document and select Info in the left navigation. The Title field is to the right under the image of the document and the Properties header. To change the text, click in the field and replace the existing text with your new information.

- Enter the date that the letter will be sent using the "month day, year" format.

- Enter the same date in the header of the second page.

- In one-page letters, add blank lines below the date so that the subsequent internal address is as far from the top of the page as the complimentary close (i.e., "sincerely" line) is from the bottom.

- Use the honorific that the person prefers, such as "Mr.," "Ms.," "Dr.," "Mx"

- Type the full name of the recipient of the letter.

- Add the recipient's name (without honorific) in the header of the second page.

- Add more lines if the street address requires them. Spell out the state name, i.e., Massachusetts rather than MA.

- If you want to include a subject line, use the RE line in the template. If not, delete this line and leave two blank lines between the address and the salutation line (i.e., "dear" line).

## ENDING YOUR LETTER

- If you are copying anyone, indicate so at the end of the letter, in the lower left-hand corner, after your signature, name, title, and organization.

- Add additional carbon copy (cc) lines, as necessary, as shown in the example below:

  **cc:  R. Smith, Massport[shift+return]**
  **J. Jones, MBTA**

  - Use the shortened form or acronym of any organization name, if available. If the copied recipient has no organization, delete the comma following the name.

  - Use soft returns (Shift + Enter) when adding new lines to maintain the formatting. Or: hit Tab on subsequent lines to put them in line with the one above it.

  - If you are not copying anyone, delete the cc: line from the template.

- If your letter has enclosures, indicate so below your signature, name, title, and organization (or cc: lines, if present).

  - Type "Enclosure" for only one and "Enclosures (N)" for multiple enclosures, where N is the number of items enclosed.

  - At the beginning of the letter, briefly describe each enclosure and explain why it is included and how the reader should use it.

  - If you do not have enclosures, delete the enclosure line from the template.

## PREPARATION FOR EDITING AND POSTING

- Make sure that Track Changes is always ON during the editing process of your draft. Editorial will turn off Track Changes when your document is finalized.

- For MPO meeting materials, Graphics will add the letterhead then notify you and a member of Certification Activities or Outreach and Communications of the location of the final document. A member of Certifications or Outreach and Communications will post the document.

- For other website postings, Graphics will notify you directly. You should consult with the Director of Policy and Planning and Data Resources about posting the document. Data Resources will post the document once it has been approved for posting.

# JOB ADS

If you need help using the template or have any questions, please see someone in the Editorial or Graphics group.

Remember to apply styles throughout your document. Refer to the Getting to Know the Process section of this guidebook to make sure that you are applying them correctly.

## USING THE JOB AD TEMPLATE

- Download the Job Ad template from our intranet site (https://intranet.ctps.org/templates-home) to ensure that you are working with the most up-to-date template. Rename your document according to the CTPS file-naming protocol. (See *How Should I Name My Document?* on page 10.)

- The job ad template is required for each new position to ensure that all job postings are consistent throughout the agency.

- The Qualifications section should include the following statement prior to the list of qualifications of the role:

  - While the following sections describe required and desirable qualifications, CTPS is open to candidates who believe that their particular experience and skills fulfill the requirements.

- Similar to our other products, job ads will need to go through the Editorial process before posting to the website.

- If you have any questions about information needed for completing the job ad, refer to Human Resources.

## PREPARATION FOR EDITING AND POSTING

- Make sure that Track Changes is always turned on during the editing process of your draft. Editorial will turn off Track Changes when your document is finalized.

- A final version is sent to a member of the Human Resources team.

**[INSERT JOB TITLE HERE]**

**BOSTON REGION METROPOLITAN PLANNING ORGANIZATION**

**CENTRAL TRANSPORTATION PLANNING STAFF**

**Description**

The Central Transportation Planning Staff (CTPS) of the Boston Region Metropolitan Planning Organization (MPO) seeks a [*job title*]. [*Describe role here.*]

**Responsibilities**

[*Describe responsibilities here.*]

**Qualifications**

While the following sections describe required and desirable qualifications, CTPS is open to candidates who believe that their particular experience and skills fulfill the requirements.

**Additional Information**

[*Include other relevant information here.*]

This is a full-time position and the starting salary range is [$x - $x] annually, contingent upon qualifications and experience.

 *or*

This is a [part-time *or* full-time] position and the candidate will work [x–x] hours per week during regular business hours (Monday–Friday, 8:00 AM–5:00 PM). The pay rate is [$x–$x] per hour, contingent upon qualifications.

CTPS offers excellent Massachusetts state employee benefits; a flexible, supportive, and family-friendly work environment; and a commitment to ongoing professional development. Our office is located in downtown Boston, in a transit-oriented and bicycle-friendly environment. We are currently working remotely during the COVID-19 pandemic, and the agency will pilot hybrid work schedules once a return to the office is initiated. The return to the office will be based on health indicators and guidance. All employees will be required to provide proof of vaccination status.

Candidates must have legal authorization to work in the United States [*include this text if required:* and a valid driver's license and/or the ability to arrange transportation to meetings in different parts of the region.] [*Include this text if relevant:* A Criminal
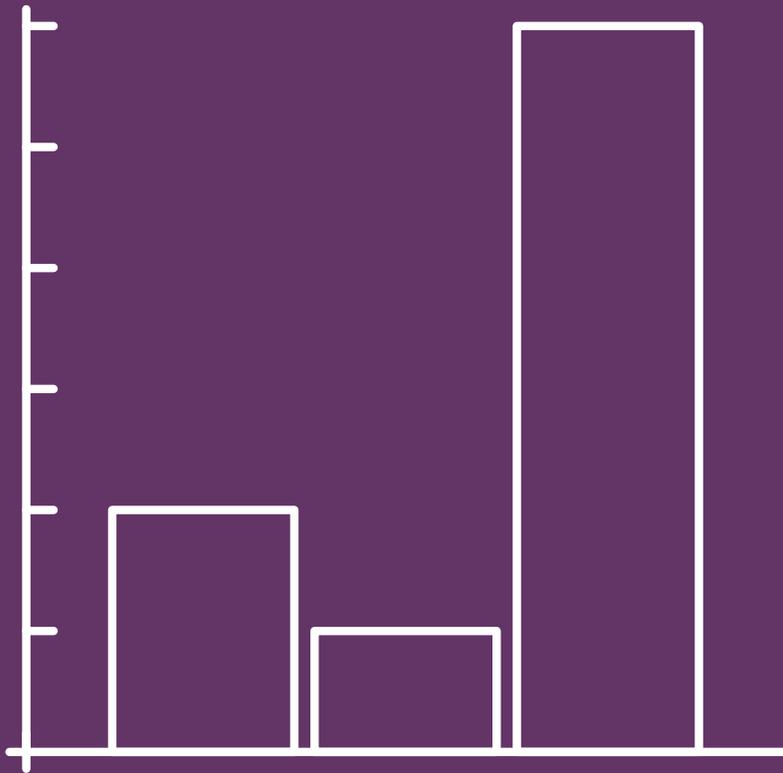
# TABLES AND FIGURES

**Making Tables Accessible**

**Starting Out**

**Figure/Image Requirements**

**Copyright/Credit Information**

**Inserting the Table Into a Word Document from Excel**

**Formatting Tables**

**Simple Format Guide**

# NOTES

Tables for Work Plans and Programs, Reports, and Memos must be created in Excel.

Alt-text will need to be provided for all tables and figures (for all public-facing documents) in a separate Word document. This should be sent to Editorial during the review process. You can find more information about creating alt-text on page 16. If you need help creating or formatting tables, or have any questions, contact the Editorial or Graphics group.

## MAKING TABLES ACCESSIBLE

Tables must be formatted using CTPS accessibility standards so that they can be fully described and navigated by a screen reader. Screen readers are applications that audibly read the material in an electronic voice to people who have difficulty reading from a computer monitor. Most people who use screen readers are blind or have low vision, but others may need to use them because of a learning or cognitive disability.

Formatting tables for screen readers works best when you create the table in Excel; therefore, generate all tables for work plans and programs, reports, and memos in Excel. Once formatted, you can then insert them into your document. The Meeting Minutes template has its own style for creating tables on page 48.

There are many ways of constructing tables, however, tables can be categorized broadly into two types: "simple" and "complex" tables.

- Simple Tables should be used whenever possible.

    ◦ They present data in a completely uniform grid, with only one row of column heads (the top row in the table) and only one column of row heads (the first column in the table), with no merged cells or subsections.

- Complex Tables should be avoided whenever possible.

    ◦ They have rows that are organized in multiple sections (each with a row section head) and/or multiple columns (each with a column head) grouped under one common column section head (in a merged cell).

## STARTING OUT

- Do not merge cells. A screen reader cannot properly navigate a table that has merged cells.

- Avoid using complex tables whenever possible. If you need help converting your complex table into a simple table, see the Graphics group.

- Data must be entered in ALL cells. For blank cells, type in "blank," and match the color of the typeface to the color of the cell's background. This way, it will visually appear blank, but still can be read by a screen reader.

- Do not insert extra empty rows or columns to add space.

## FIGURE/IMAGE REQUIREMENTS

Figures and images included in your report, memo, presentations should be of a high resolution and no smaller than 150 dpi. Graphics has an archive of high-quality images that can be used for your product.

## COPYRIGHT/CREDIT INFORMATION

To use a figure in your report, memo, or presentation, you must have permission to do so or own the image outright (personally or through CTPS). You cannot use an image from the internet in your report, memo, or presentation unless it is in the public domain. Contact the Graphics team if you are looking for a particular image as they may already have it in their archive. There are also transportation-related stock photos that can be used. However. if you are using an image from another source and you have permission to do so, you must provide credit information underneath the image or in the citation area.

If you have any questions about image copyright, public domain, or listing the credit information, contact Editorial.

## INSERTING THE TABLE INTO A WORD DOCUMENT FROM EXCEL

- Highlight and Copy the table cells and Paste them into Word using either the Use Destination Styles or Link and Use Destination Styles options in the Paste drop-down menu (the first icon on the Home tab on the Ribbon). Using either option allows you to change the table formatting in Word after the table has been inserted.

- Using the Link and Use Destination Styles option allows you to update the table data in Word automatically to reflect any changes you have made to the Excel table. To do so, right click anywhere in the Word table and click Update Link.

- If a table is to be a full page, create a placeholder page instead of inserting it into the Word document. To create a placeholder page, add a blank page where the table(s) or graphic(s) will be inserted. DO NOT use section breaks. On this placeholder page, write the figure number and title of the accompanying file on the page. Apply Figure/Table Title style. Graphics will insert the table(s) or graphic(s) in the PDF when they prepare it for posting.

- Use dashes not periods (ex Table A-3)

- If the table continues onto the next page, repeat the column headers at the top.

# FORMATTING TABLES

- After inserting the table into Word, format the table using the Simple Table Format Guide. .

- For a full-page table that will not be inserted into Word:

    ○ Format the table in Excel, using the Simple Table Format Guide. Create the table title in the Excel workbook page header: click the Header & Footer icon in the Text group of the Insert tab on the Ribbon, and type the table title.

    ○ Forward the file to Graphics to be added to the final document PDF.

# SIMPLE TABLE FORMAT GUIDE

.

**TABLE 1**
**Results of the Ridership Analysis of the Urban Ring Study**

| Model Statistic | New Parking Supply | Old Parking Supply |
|---|---|---|
| Daily transit mode split | 47 | 44 |
| Daily transit trips | **8,000**[a] | 75,000 |
| Daily auto trips | 375,000 | 375,000 |
| Daily vehicle miles traveled on arterial roadways | 275,600 | 275,600 |
| Daily vehicle hours traveled | *blank* | 456,000 |
| Daily parking demand | 955 | N/A |
| Unit operating cost per passenger | $0.80 | $1.65 |
| *Subtotal* | *579,500* | *579,500* |
| **Total** | **579,500** | **579,500** |

TITLES/TABLE NUMBERS

COLUMN HEADS

ROW HEADS

TOTAL

CITATION AREA

FOOTNOTES

Note: This table is not meant to make sense.
[a] 8,000 is bold
N/A = not applicable
Source: Data from Massachusetts Port Authority, Logan Five-Year Plan (2002), pp.121-27.

## Acronyms/Abbreviations

- All acronyms and abbreviations used in a table should be defined below the table, on a separate line in the citation area.

- Arrange them alphabetically and separate them with periods. For example:
FFY = federal fiscal year. mph = miles per hour. N/A = not applicable or available.

## Alignment

*Placement of table on page:*

- Center tables horizontally on the page.

*Column heads:*

- Vertically align text in the column head at the bottom of the cell (whether or not the text in the column head wraps).

*Columns of numbers, including column head:*

- Right-align columns of numbers.

*Columns of text, including column head:*

- Left-align columns of text.

*Columns of mixed text and numbers:*

- Right-align columns of mixed text and numbers.

*Row heads (far left column):*

- Left-align text in row heads in the far left column.

- If the text is more than one line, use a hanging indent.

*Rows:*

- If only the row head has text on multiple lines, align cell contents at the bottom of the cell.

- If cells other than the row head have text on multiple lines, align cell contents at the top of the cell.

*Vertically oriented text:*

- Left-align text that is vertically oriented within a cell.

## Bold Typeface

The following components should always be in bold type:

- Column heads

- Total rows

- Table titles

Bold text can also be used to emphasize the contents of a cell.

## Borders

*General:*

- "Borders" are any lines in a table.

- Use the Borders function to create them.

- Never use underscore or underline functions.

*Vertical borders:*

- Try to avoid using vertical borders.
    - Vertical borders may be used to make a visual statement or separate columns of data that must appear very close together, or if they would help the reader grasp the organization of the table.

*Horizontal borders:*

- Use horizontal borders only above and beneath column heads, above totals, at the bottom of a table, or to divide subsections.

- Use continuous borders, not partial borders.

*Thickness of borders:*

- In general, use default one-point lines for borders in Word, or the thinnest border option in Excel.

## Capitalization

*In column heads:*

- Capitalize all major words (as you would see in the title of a book), but lowercase articles (the, a, and an), prepositions (up, down, on, to, etc.), and conjunctions (and, but, for, or, nor).

*In row heads:*

- Capitalize only the first letter of the first word.

## Citation Area

- Text in the citation area (the area below and on the outside of a table) should be two points smaller than the point size of the text in the table body. For example, if a table is displayed in Arial 12 point, then the footnotes, definitions, source, etc., should be in Arial 10 point. Text should be no smaller than 8 point.

- Left-align citation text with hanging indents; do not skip any lines.

- The order of citations is as follows (each on its own line):

  > Note(s) (A "note" is a comment that applies to the entire table.)
  > [a]Footnotes (A "footnote" applies only to a specific element in a table.)
  > Acronyms (Multiple acronyms should be on one line.)
  > Source

## Column Heads

- A column head contains text at the top of a column; it defines the data in the column.

- Column head text is bold.

- See Alignment above.

## Column Widths

- Columns with the same category of data, for example, a group of columns all giving numbers of trips under various scenarios, should be of equal width.

- Columns with varying types of data do not have to be of equal width.

## Consistency

- Format should be consistent within each table and from table to table within a document.

## Empty Cells

- Empty cells are not audibly signaled by a screen reader, which can lead people using screen-reading software to lose their place in the table. Therefore, all cells must have something in them.

- Write "blank" or use symbols or numbers formatted in the same color as the table background (usually white) in the "empty" cells.

- For column and row heads, write "no heading."

- For data cells, write a zero, N/A, or em dash (use the Special Character tab in the Insert Symbol dialog box).

## Font and Point Size

- Use Arial 12 point in the body of table and Arial 10 point in the citation area.

- Sometimes it may be necessary to use a smaller point size to fit the table on the page. In such cases, the largest possible font size should be used. If it appears that 8 point is too large, try using Arial Narrow before decreasing the point size any further.

## Footnotes

- Do not use MS Word's footnote function to place footnotes under a table.

- Footnotes should appear immediately following the table, not in the table or at the bottom of the page.

- The Figure/Table Citation style in CTPS's memo and report templates automatically provides the proper spacing.

- Use an asterisk (*) if only one footnote is needed.

- For an all-text table, use numbers as footnote symbols.

- For numerical or mixed (numbers and text) data, use lower case letters as footnote symbols.

- Make letters and/or numbers superscript both in the table and in the footnote.

- Footnotes within a table should read alphabetically or in numerical order, left to right.

- Avoid using symbols for footnotes (e.g., † ‡ §).

## Hyphenation

- Do not use hyphens to split words in tables.

## Landscape-Oriented (Horizontal) Tables

- When placing a landscape-oriented table in a document with mostly portrait-oriented pages, center the table on the page horizontally.

## Not Applicable/Not Available

- Write "N/A," not "na" or "NA," to indicate "not applicable" or "not available."

- Alternatively, you may put an em dash in the cell (use the Special Character tab in the Insert Symbol dialog box).

- If N/A is used, define this acronym in the citation area.

## Numbers

*Commas:*

- Use commas in numbers of 1,000 or greater (1,000 not 1000).

*Decimals:*

- Include leading zeros (0.68 not .68) and closing zeros (1.60 not 1.6) if rounding to two decimal places).

*Negative Numbers:*

- Use a negative sign rather than parentheses () to denote negative numbers.

## Plural vs. Singular Wording

- Generally, you should use the singular form of words in the column heads (for example, "Model Statistic," not "Model Statistics").

## Project Name

- The project name does not need to appear with the table unless the table will be distributed separately, such as in a meeting handout, in which case, the project name may be added in the header or footer.

- The project name should not be part of the table or table title.

## Row Heads

- The leftmost column contains the titles of rows ("row heads").

- The row head must contain information that defines the contents of a row.

- Capitalize only the first letter of the first word.

- A subtotal row head should indicate which values are included in the subtotal.

## Shading

- Shading within cells or rows may be used with discretion.

- Use high-contrast shading so that text clearly stands out from the background. Shading of alternate rows is recommended on large tables that are one page or longer.

## Spacing

- Do not add extra rows or columns to create spacing.

*Spacing between columns:*

- Avoid large gaps between columns.

- Space between columns should appear equal.

- Add more space between groups of columns within a table.

- There should be space between a cell's contents, borders, and the content of adjacent cells.

- You may add space by indenting text. Use either the left or right horizontal alignment function.

*Spacing between rows:*

- Add a small amount of space above and below each horizontal border. In Excel, increase the row height and vertically align the cell contents at the top, center, or bottom of the cell to achieve the desired result.

## Source

- The citation of source should begin with the word "Source" followed by a colon.

- The source should be the last item listed in the citation area.

## Tables That Continue on Multiple Pages

- Do not split tables manually at the end of a page.

- Use the Repeat Header Rows table function, and allow them to split automatically.

## Text Tables

- You may use a text table to organize text data in a document.

- Some of the rules of numerical data tables do not apply. For example, you may center columns of text if it is helpful in conveying the meaning of content.

- Usually, columns with text are left aligned.

## Titles/Table Numbers

- Use Figure/Table Title style in the document template for table numbers and titles

- Capitalize the title in sentence caps and center it above the table.

- Table numbers should be bold (for example, Table 3).

- The table number should be followed by a soft return [Shift + Enter], so that it is on a separate line above the table title.

- Title should be as short as possible. If the title does not fit on single line, the text should wrap (flow to the next line).

## Total

- Write "Total," not "Totals."

- The entire total row should be bold.

- Put a border above and below the total row.

- The entire subtotal row should be in italics.

## Unit Signs

- Unit signs are symbols that refer to units of measure (for example, #, $, %, x, kg, mph).

- Do not repeat the same unit sign in every cell in a column unless more than one unit sign is used in the column.

- Do not use unit signs in column or row heads; rather, write the word (for example, "percent," not "%").

- All abbreviations and acronyms used in a table must be defined in the citation area below the table.

# A

## APPENDICES

**Work Scope Accessible-Document Production Process**

**Memo and Report Accessible-Document Production Process**

**Simple Table Format Guide**

**File-Naming Convention**

# WORK SCOPE
# ACCESSIBLE-DOCUMENT PRODUCTION PROCESS

**ROUTING OF WORK REQUEST**

Regardless of who makes a request for work to be undertaken, CTPS staff member notifies their group manager who directs the request to the Executive Director/Deputy Executive Director/Directors.

**REVIEW OF REQUEST**

The Executive Director contacts OTP leadership to ensure that they are aware of the work request and are in agreement that a scope should be written.

**WRITING OF SCOPE**

After receiving go-ahead from Executive Director, author:
- Assembles project scoping team.
- Convenes a meeting between Graphics, Editorial, Outreach and Communications, and other relevant groups to brainstorm about the presentation of the final product and potential outreach and promotion activities.[1]
- Writes scope using template on intranet (laputa/index.html).
- Creates scope exhibits using Exhibit Builder Tool on intranet.
- Completes Project Support Budgets form and sends, along with scope, to Director of Finance and Operations.

**REVIEW & APPROVAL**

**The draft scope is reviewed and approved by:**
GROUP MANAGER, DIRECTORS/EXECUTIVE DIRECTORS, EDITORIAL GROUP, CLIENT.

## IF SCOPE MUST BE APPROVED BY MPO

*Action Completed No Later Than:*

| Step | Description | Action Completed No Later Than |
|---|---|---|
| **ALERT GRAPHICS** | **Author emails ALL Graphics staff** that a work scope will be available soon. | *When document is sent to Editing* |
| **GET SCOPE ON MPO AGENDA** | Work scope approved for placement on MPO agenda at agenda-setting meeting. (The week before the agenda-setting meeting,[2] author should alert the Executive Director and Certification Activities staff that they wish to have the scope on the agenda.) | *Monday[3] of the week preceding the MPO meeting* |
| **EMAIL GRAPHICS COMPLETED SCOPE** | **Author emails ALL Graphics staff (graphics@ctps.org)** the COMPLETED, APPROVED, AND EDITED SCOPE (in MS Word). | *Tuesday of the week preceding the MPO meeting* |
| **CREATE PDF & HTML DOC.** | Graphics staff **CREATES FINAL** PDF (with letterhead) and HTML versions of scope **and VERIFIES** accessibility.[4] | *Tuesday-Wednesday of the week preceding the MPO meeting* |
| **PLACE & NOTIFY** | Graphics staff **PLACES** PDF and HTML versions in \\Lilliput\ groups\Accessibility_ processing\Work_scopes\ Accessible_HMTL_PDF. **Graphics staff NOTIFIES** Certification Activities staff that scope is ready for posting on website. | *Thursday of the week preceding the MPO meeting* |
| **PLACE ON WEBSITE** | Certification Activities staff **PLACE** PDF and HTML versions on website (and deletes the PDF and HTML files from the "Accessible_HTML_PDF" sub-folder). | *By 5:00 PM on Thursday of the week preceding the MPO meeting* |
| **SEND CONFIRMATION** | Certification Activities staff emails a **CONFIRMATION** to author and Graphics that scope has been posted. | *Immediately after posting* |

■ **AUTHOR**　　■ **GRAPHICS**　　■ **CERTIFICATION or IT&S**

[1] This may also be included with the project scoping team meeting.
[2] The agenda-setting meeting is generally held on the Monday of the week preceding the week of the MPO meeting.
[3] If Monday is a holiday, submit by the preceding Friday.
[4] After Graphics staff create the PDF and HTML versions of the scope, they place the author's original document in the "Post_process_originals" sub-folder under \\Lilliput\groups\Accessibility_processing\Work_scopes\.

*April 2022*

# MEMO AND REPORT
# ACCESSIBLE-DOCUMENT PRODUCTION PROCESS

The following process should be followed for all CTPS-produced documents (other than work scopes[1]) that will be posted for an MPO meeting or anywhere on the MPO website.

| ACTION | Description | Action Completed No Later Than: |
|---|---|---|
| **ALERT GRAPHICS** | **Author emails ALL Graphics staff** (graphics@ctps.org) that a document will be available soon. | *When document is sent to editing* |
| **GET DOCUMENT ON MPO AGENDA** | Document approved for placement on MPO agenda at agenda-setting meeting **(if applicable)**. The week before the agenda-setting meeting, author should alert the Certification Activities staff that they wish to have the document on the agenda.[2] | *Monday[3] of the week preceding the MPO meeting* |
| **PLACE DOCUMENT IN FOLDER AND NOTIFY GRAPHICS** | **Author PLACES** COMPLETED, APPROVED, AND EDITED DOCUMENT (in MS Word) in a sub-folder under \\lilliput\groups\Group_name\subfolder\ document. **Author emails ALL Graphics staff** (graphics@ctps.org) to tell them where document has been placed, noting date of MPO meeting. | *Tuesday of the week preceding the MPO meeting* |
| **CREATE PDF & HTML DOC.** | **Graphics staff CREATES FINAL** PDF (with letterhead) and HTML versions of document **and VERIFIES** accessibility.[4] | *Tuesday-Wednesday of the week preceding the MPO meeting* |
| **PLACE & NOTIFY** | **Graphics staff PLACES** PDF and HTML versions in \\Lilliput\groups\Accessibility_processing\ *(appropriate sub-folder)*\Accessible_HTML_PDF. **Graphics staff NOTIFIES** appropriate party[5] that document is ready for posting on website. | *Thursday of the week preceding the MPO meeting* |
| **PLACE ON WEBSITE** | **Appropriate party[5] PLACES** PDF and HTML versions of the document on website (and deletes the PDF and HTML files from the "Accessible_HTML_PDF" sub-folder). | *Thursday of the week preceding the MPO meeting* |
| **SEND CONFIRMATION** | **Appropriate party[5] emails a CONFIRMATION** to author and Graphics that document has been posted. | *Immediately after posting* |

**AUTHOR**    **GRAPHICS**    **CERTIFICATION or IT&S**

[1] For work scopes, please refer to the "Work Scope Accessible-Document Production Process" flowchart.

[2] The agenda-setting meeting is generally held on the Monday of the week preceding the week of the MPO meeting.

[3] If Monday is a holiday, submit by the preceding Friday.

[4] After Graphics staff create the PDF and the HTML versions of the document, they place the author's original document in the "Post_process_originals" sub-folder under \\Lilliput\groups\Accessibility_processing.

[5] For documents associated with MPO meetings, this refers to Certification Activities staff. For all other documents, this refers to Data Resources staff.

*April 2022*

# SIMPLE TABLE: FORMAT GUIDE

Example of:
LANDSCAPE-ORIENTED
(HORIZONTAL) TABLES

FONT AND POINT SIZE:
Arial 12 points

Space below the
table title is automatically
set to half the text point
size when the "caption"
style is used

Use singular form
in column heads

Sentence
style
capitalization
in row heads

Hanging
indent (2
spaces)

Citation area
below table
includes:
i Note(s)
ii Footnotes
iii Acronyms
iv Source

Align text at the
bottom of the cell

Title style
capitalization
in column
heads

Extra space below
and above borders

Right-align if all
numbers

Left align if all text
Right-align if text
and numbers
combined

Use commas
in 1,000s

Citation area font
and point size:
10 point

Spacing between columns
should appear equal

## TABLE 1

### Results of the Ridership Analysis of the Urban Ring Study

| Model Statistic | New Parking Supply | Old Parking Supply |
|---|---|---|
| Daily transit mode split | 47 | 44 |
| Daily transit trips | **8,000** [a] | 75,000 |
| Daily auto trips | 375,000 | 375,000 |
| Daily vehicle miles traveled on arterial roadways | 275,600 | 275,600 |
| Daily vehicle hours traveled | *blank* | 456,000 |
| Daily parking demand | 955 | N/A |
| Unit operating cost per passenger | $0.80 | $1.65 |
| *Subtotal* | *579,500* | *579,500* |
| **Total** | **579,500** | **579,500** |

Note: This table is not meant to make sense.
[a] 8,000 is bold
N/A = not applicable
Source: Data from Massachusetts Port Authority, Logan Five-Year Plan
(2002), pp. 121-27.

# FILE-NAMING CONVENTION

| **Author File Name** | **Editor File Name** |
| --- | --- |
| 2021-10-28 Early-Morning Transit Service MEM JB 1 | 2021-10-28 Early-Morning Transit Service MEM JB 1a |

**2021-10-28**[*]          **Early-Morning Transit Service**          **MEM**          **JB**          **1,2,3, or FINAL**

Date Submitted        Document Name          Product Type      Author        Version
to Editorial           (Recognizable,           Suffix         Initials
                     descriptive, and brief)    (See below)

[*]MUST be the same as the
date of online submission

## CTPS Product Type Suffixes

| | | | |
| --- | --- | --- | --- |
| ALT = Alternative Text | LTR = Letter | PPT = Presentation | TIP = TIP |
| BRO = Brochure | LGL = Legal Notice | PRR = Press release | TXT = Miscellaneous Text |
| FIG = Figure | LRTP = LRTP | REP = Report | UPWP = UPWP |
| FLY = Flyer | MAP = Map | SCP = Scope | WEB = Web Content |
| JAD = Job Ad | MEM = Memo | TBL = Table | |

# NOTES