

APPENDIX 1 - FORMATTING GUIDELINES

A1.0 Introduction

In order for the final tender document to be generated from CPS with a consistent, professional appearance, **all** SSPs and NSSPs must be formatted according to the following instructions and saved in **.XML** format using **Microsoft Word 2003** before being added to the CPS file.

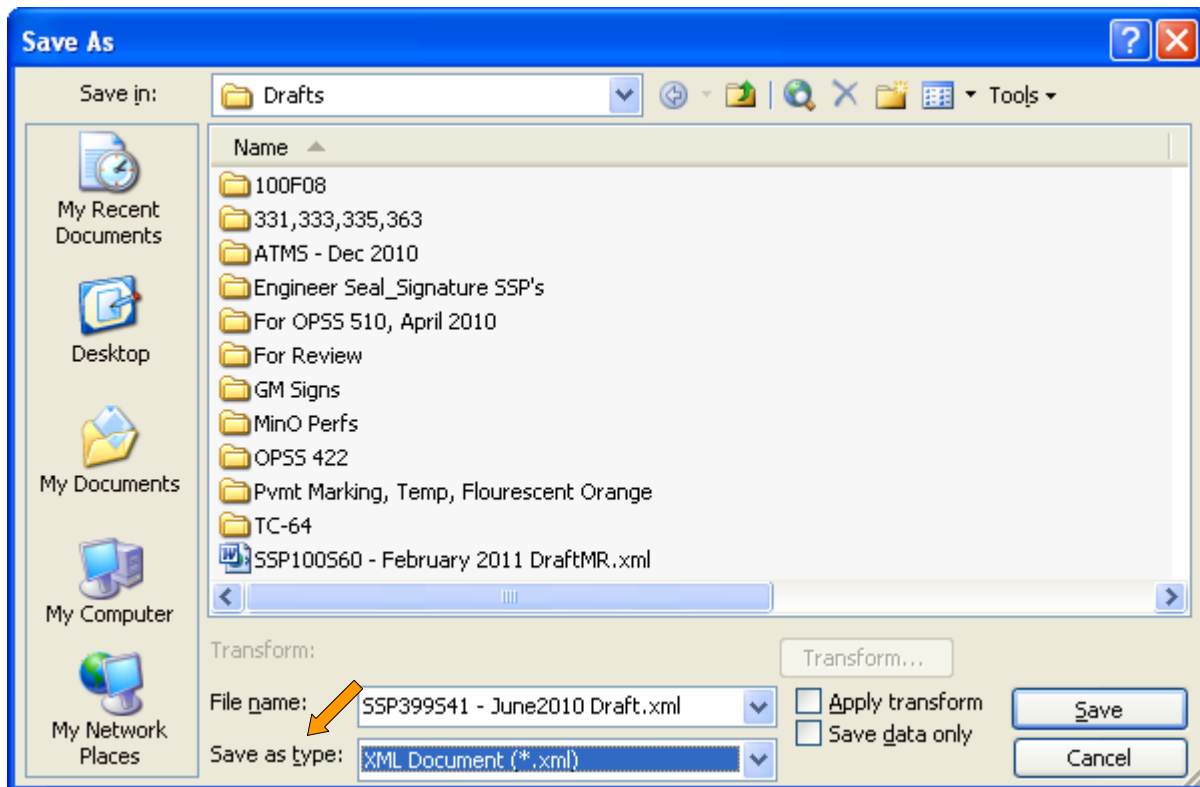
Failure to follow these instructions can result in errors in the final tender document such as unreadable symbols and incorrect numbering, failure to generate the contract package and/or the “crashing” of CPS.

A Quick Reference Guide is provided at the end of this appendix.

A2.0 Formatting Documents

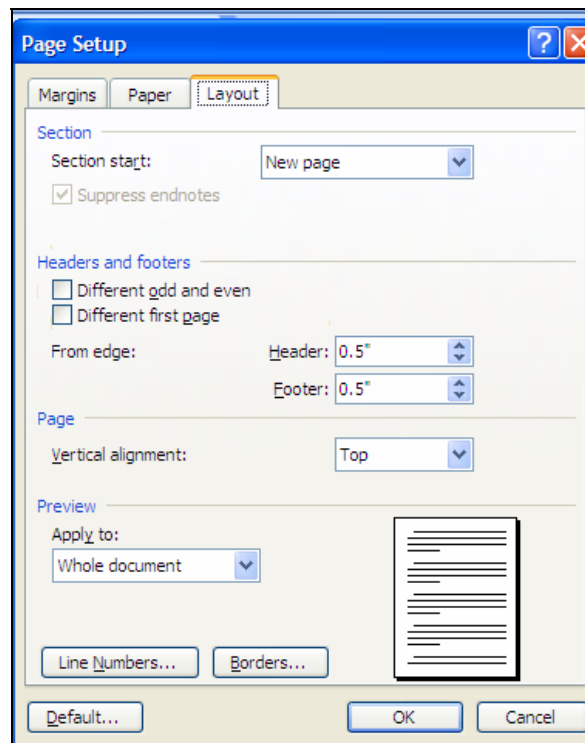
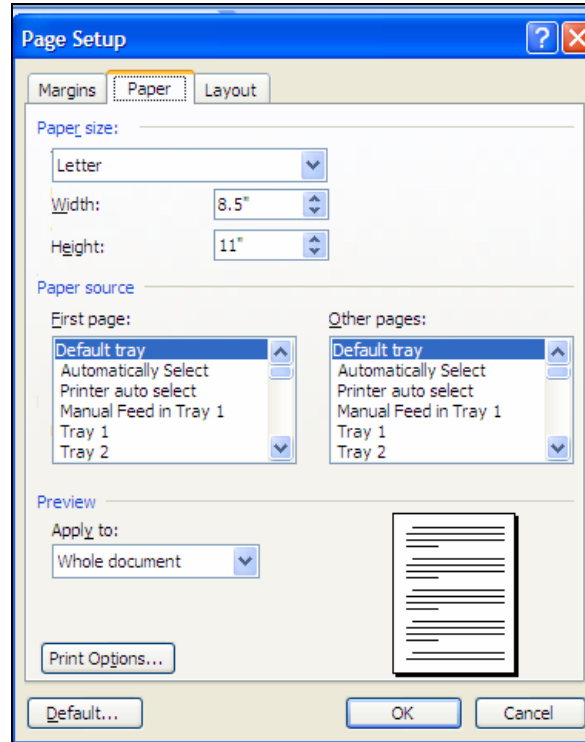
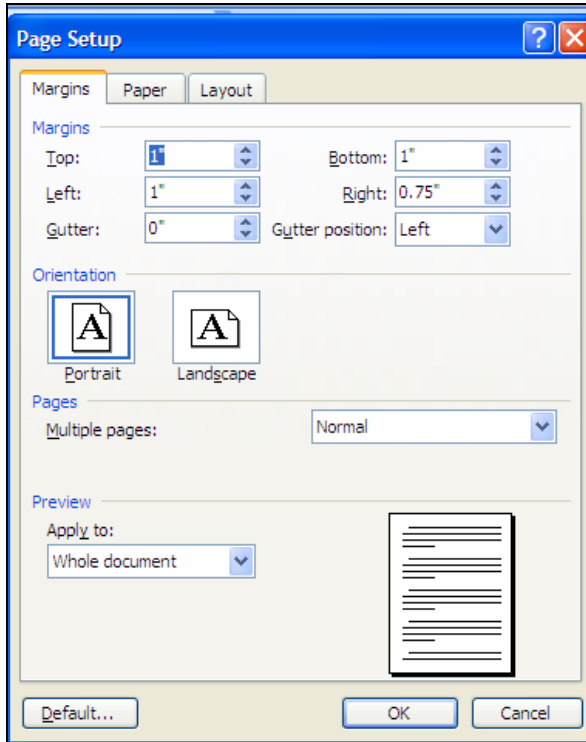
Step 1 Save Document in .XML Format Using Microsoft Word 2003

Under **File**, click **Save As**, and use the pull-down menu to select XML Document (*.xml) for **Save as type**:



Step 2 Check Page Setup

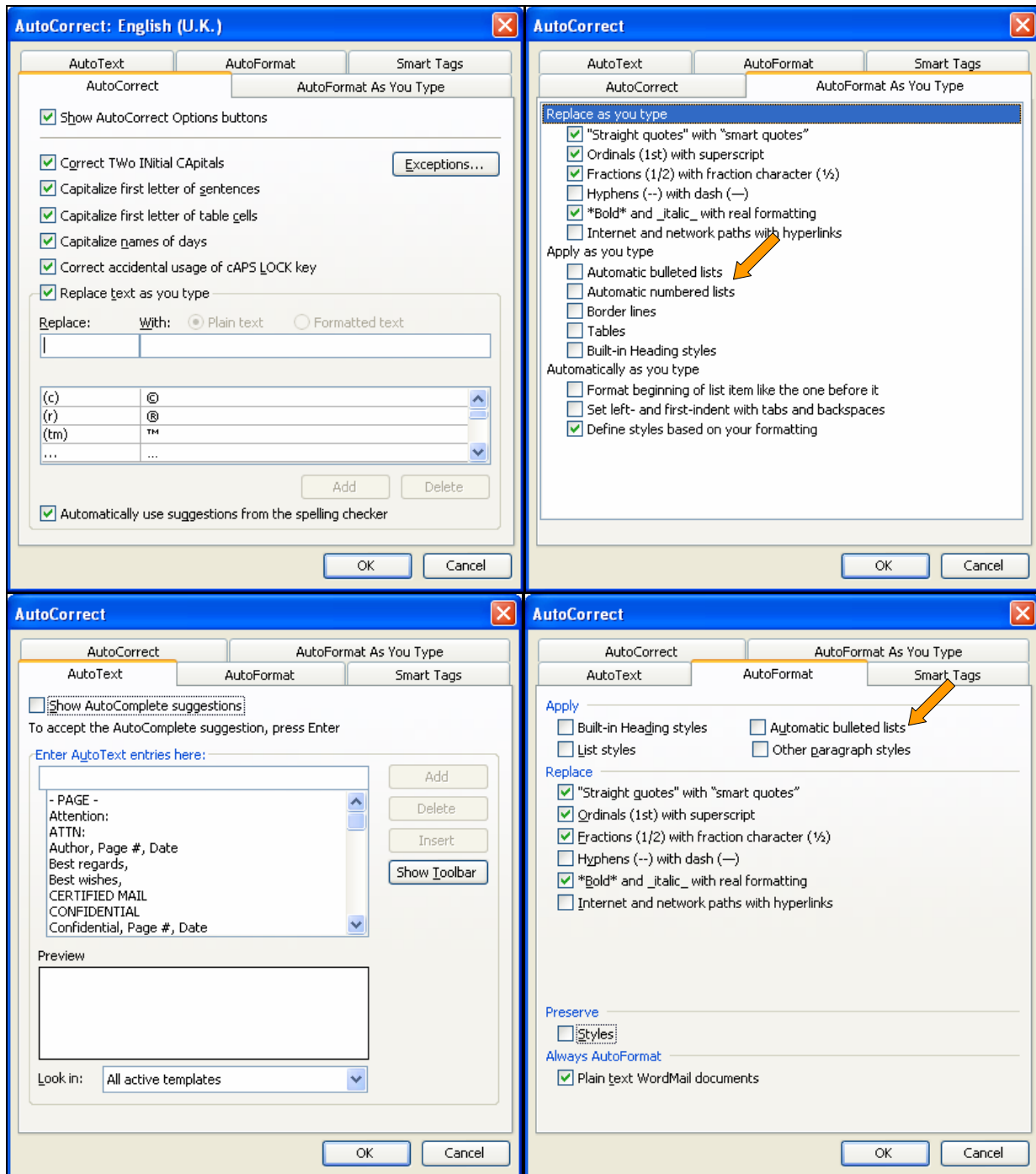
Under **File**, click **Page Setup** and ensure the **Margins**, **Paper**, and **Layout** settings are as displayed below:



Step 3 Set AutoCorrect Options

Automatic bullet and number list features **must** be disabled as these features produce errors in the final tender document generated by CPS. For example, if not disabled a), b), c) bullets could appear as d), e), f) in the final document.

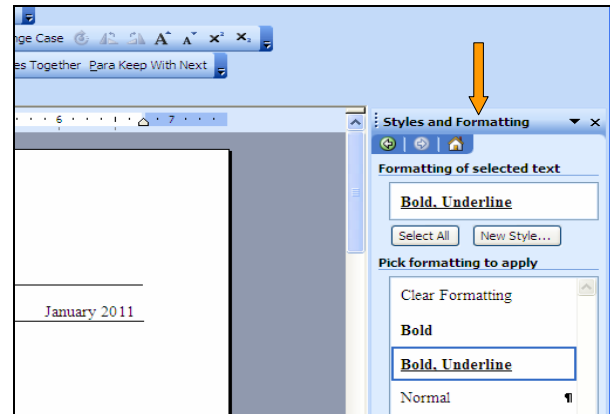
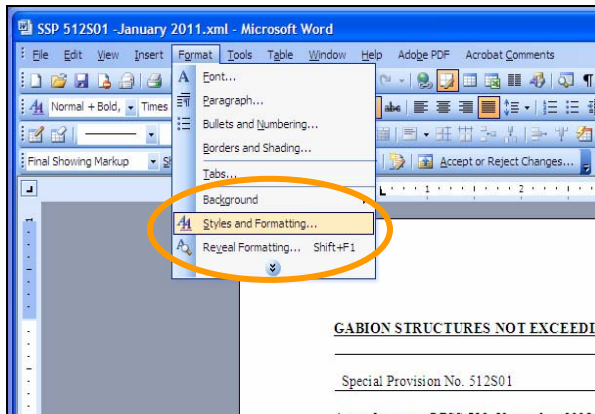
Under **Tools**, click **AutoCorrect Options** and ensure the AutoCorrect settings are as displayed below:



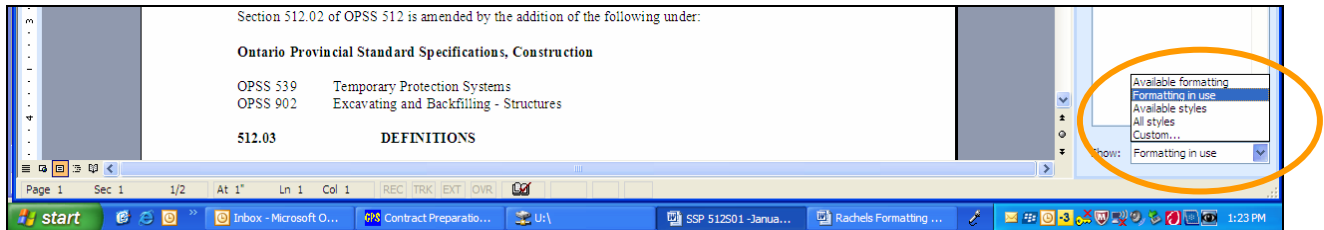
Step 4 Check “Normal” Styles

The setting of the document style to “Normal” as instructed below will ensure the correct formatting is locked into the document and will help eliminate problems when running the final contract package.

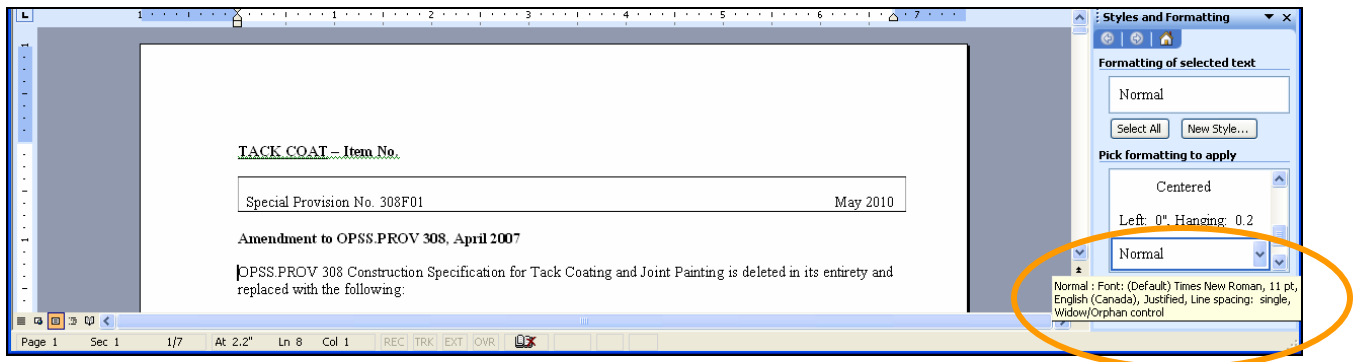
To display the Styles and Formatting task pane; under **Format**, click **Styles and Formatting**; the task pane bar will appear to the right of the screen.



In the lower right hand corner of the task pane bar, select **Show**, then select **Formatting in use** from the pull-down menu.



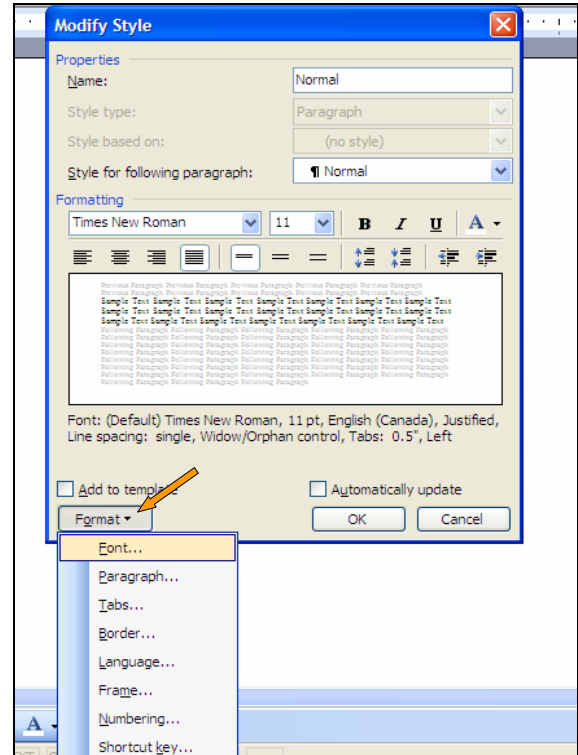
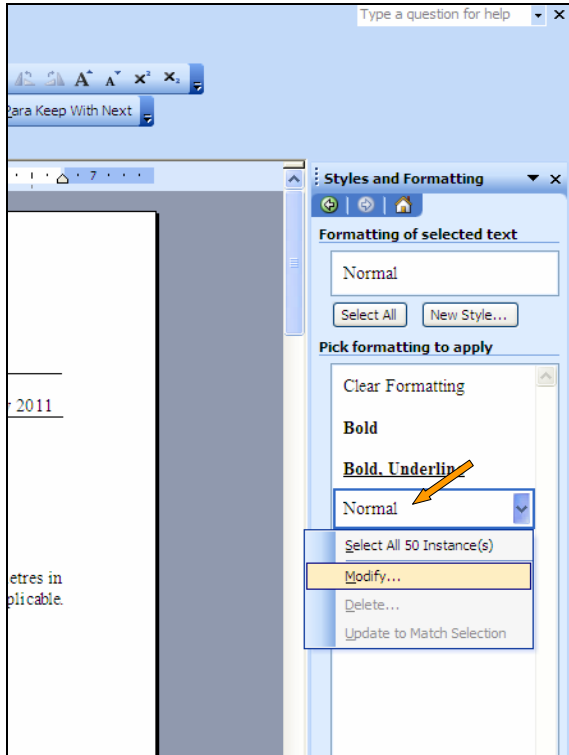
To check the settings of the Normal style, place the cursor over the word Normal in the Styles and Formatting task pane bar. The Normal style should display in a pop-up window and consist of “Normal: Font: (Default) Times New Roman, 11 pt, English (Canada), Justified, Line spacing: single, Widow/Orphan control.



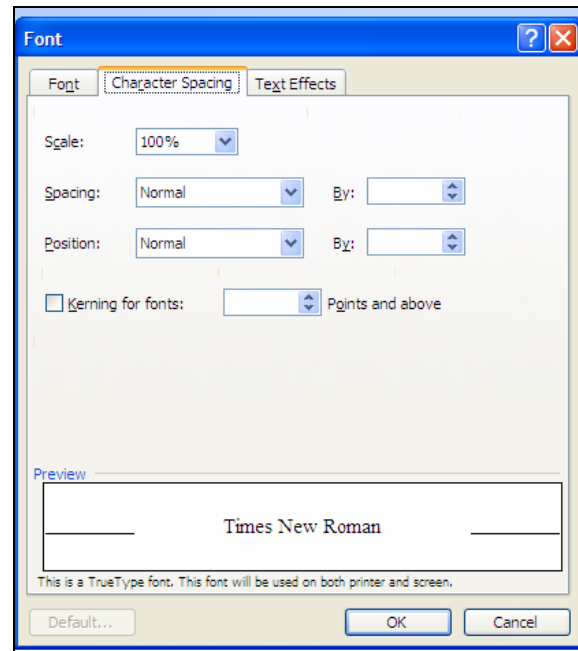
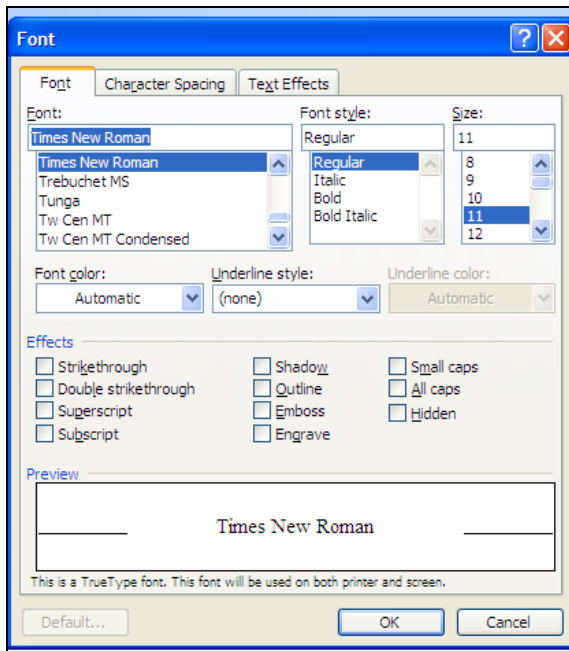
If the Normal style is not exactly as shown above, complete Step 5 below, to modify it.

Step 5 Modify the “Normal” Style

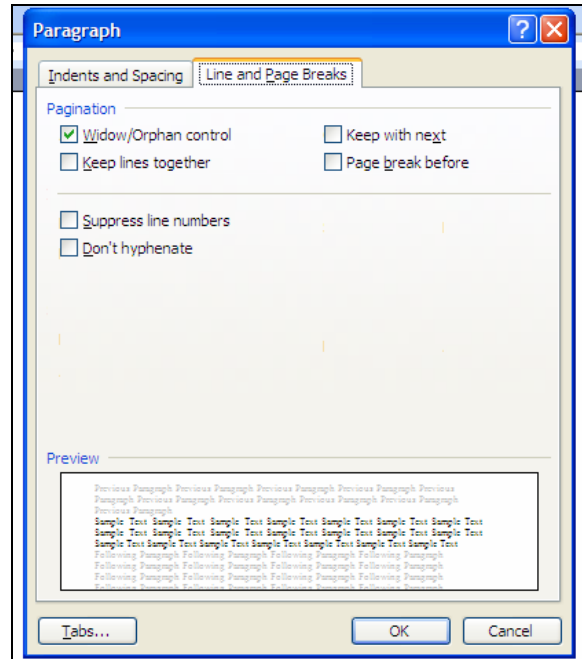
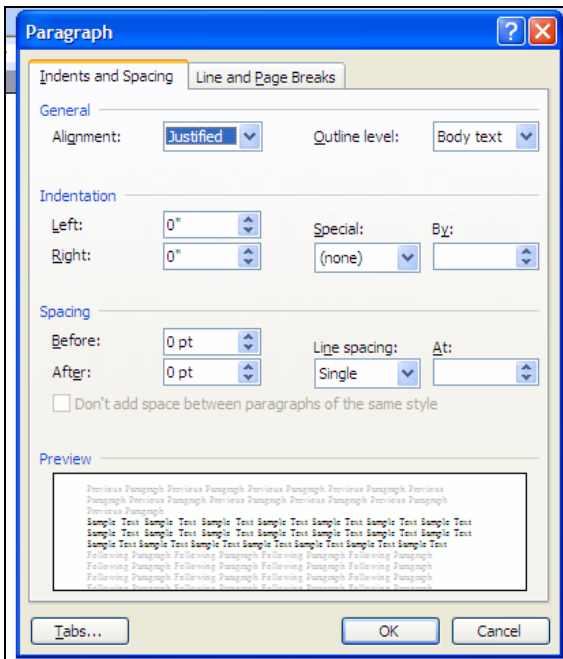
To **Modify**, place the cursor over **Normal**, click the down arrow and select **Modify** from the pull-down menu then click **Format** from the “Modify Style” window and ensure the Font, Paragraph, Tab and Language settings are as displayed below:



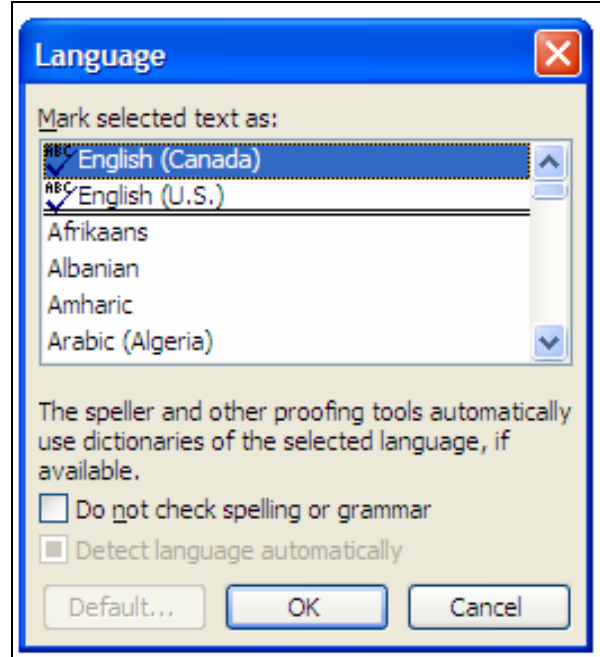
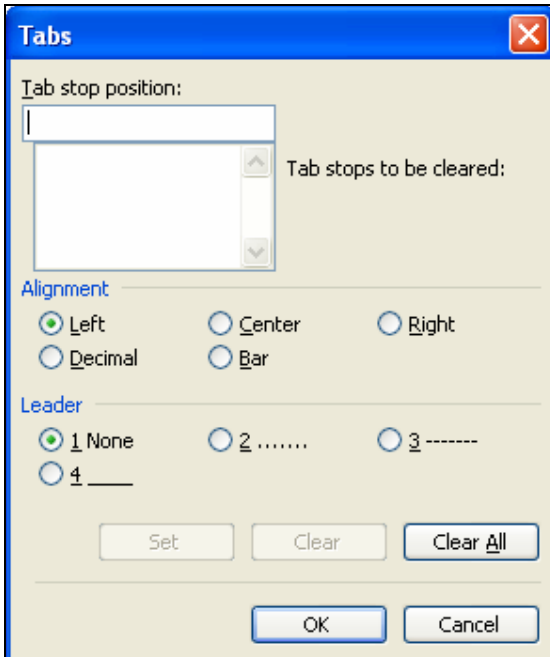
Set the **Font** and **Character Spacing** as displayed below:



Set the **Paragraph / Indents and Spacing**, and **Line and Page Breaks** as displayed below:



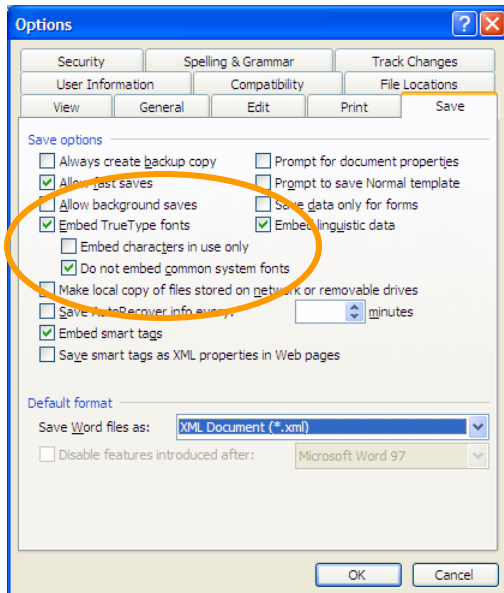
Set the **Tabs**, and **Language** as displayed below:



Step 6 Enable True Type Fonts

The Embed True Type fonts feature stores the fonts used in the document with the file so that others who open the document will be able to view and print it with the fonts used to create it, even if those fonts are not installed on their computers.

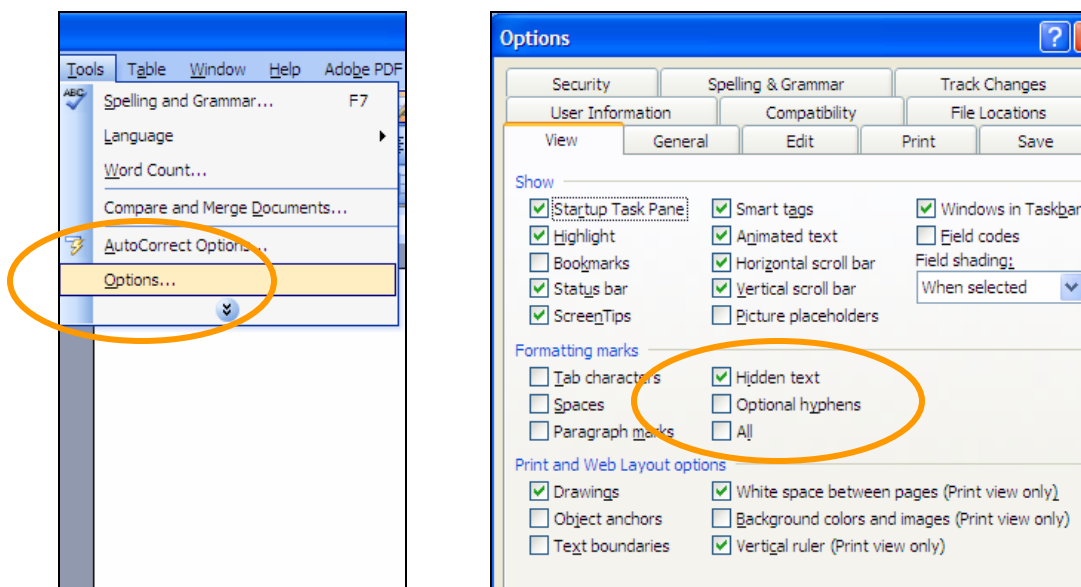
Under **Tools, Options, Save** ensure the **Embed True Type fonts** checkbox is enabled as shown below:



Step 7 Display Hidden Text

Ensure all changes and revisions that have been made to the document are displayed.

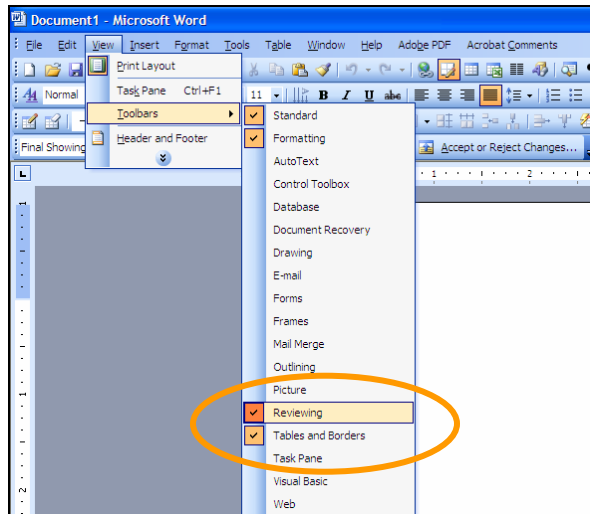
Under **Tools, Options, View**, ensure the **Hidden text** checkbox is enabled as displayed below:



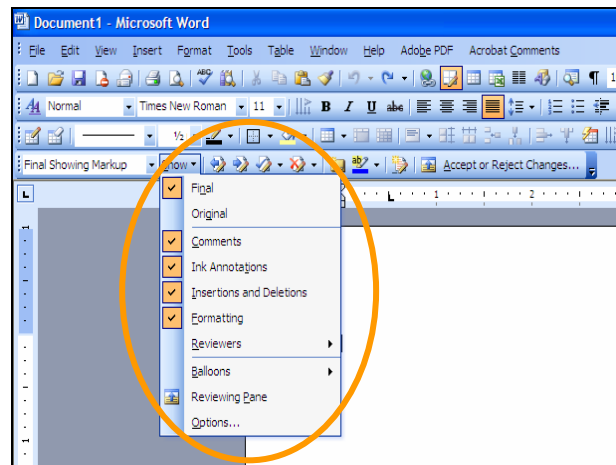
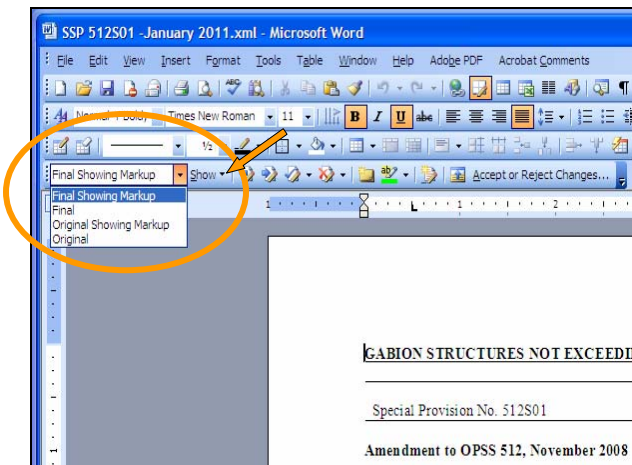
Special provisions inserted in contract packages **must** be free of all “Track Changes” revisions and any inserted editorial comments. To accomplish this, all changes in the final draft of the document must be accepted, comments deleted and “Track Changes” turned off. The following 2 steps provide guidance on these required actions.

Step 8 Accept Changes and Delete Comments

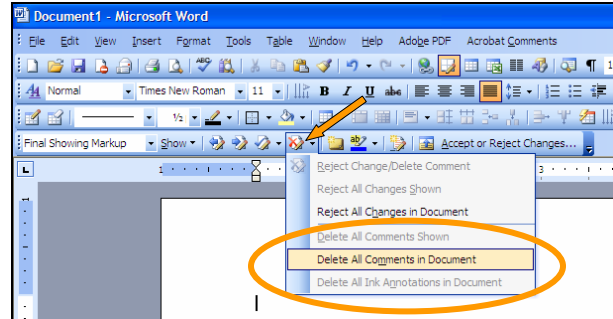
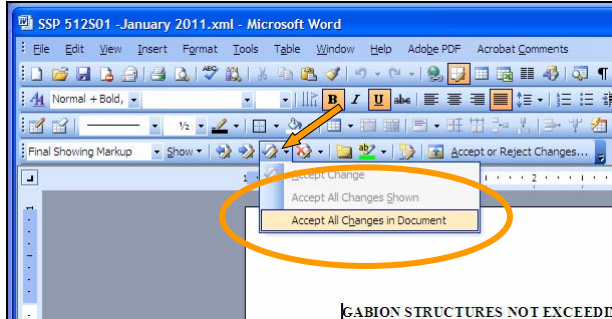
The “Reviewing” toolbar may be used to “Accept Changes”, “Delete Comments” and turn-off “Track Changes”. To access this: under **View, Toolbars** select **Reviewing** to display the Reviewing toolbar.



On the **Reviewing** toolbar as shown below; select **Final Showing Markup**, then click **Show** and make sure that a checkmark appears next to each of the items as shown below in the pop-up window:

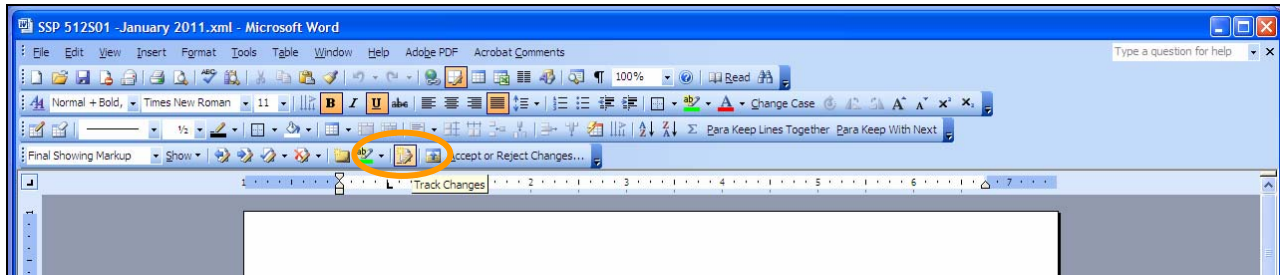


Accept All Changes in Document by clicking on the “Accept Change” symbol on the toolbar and choosing “Accept All Changes in Document” in the pull-down menu. Then, **Delete All Comments in Document** by clicking on the “Reject Change/Delete Comment” symbol on the toolbar and choosing “Delete All Comments in Document” as in the pull-down menu.



Step 9 Turn-off Track Changes

Turn off the track changes feature by clicking on the **Track Changes** symbol on the tool bar. It is turned off when the highlighted orange box around the symbol no longer appears.



Step 10 Remove Unwanted Styles and Formatting

If the above steps were followed the document should be suitable for importing into CPS however a final check should be made by scrolling through the document and removing unwanted styles, formatting, auto-numbers, etc.

If the document has been passed back and forth and edited by others then all the above steps should be repeated to ensure that the document is still formatted correctly.

Note: When editing your document, you can avoid importing unwanted styles and formatting by using the **Edit, Paste Special, Unformatted Text**, option when cutting and pasting text from other documents.

For further assistance you may contact:

Rachel Laszlo,
Engineering Standards Analyst | Design and Contract Standards Office,
301 St. Paul Street | 2nd Floor | St. Catharines ON L2R 7R4
(905) 704-2029 | Rachel.Laszlo@ontario.ca

FORMATTING QUICK REFERENCE GUIDE

<input type="checkbox"/> Step 1 - Save Document in XML	- Save document in <u>.XML</u> format in <u>Microsoft Word 2003</u>
<input type="checkbox"/> Step 2 - Check the Page Setup	- Select File, Page Setup - Top, Bottom, Left Margins 1” - Right Margin 0.75” - Letter 8.5” x 11” - Headers and Footers 0.5”
<input type="checkbox"/> Step 3 - Set AutoCorrect Options	- Select Tools, AutoCorrect Options - Ensure all Auto-number and Auto-bullet Features are Disabled
<input type="checkbox"/> Step 4 - Check the “Normal” Style Settings	- On the Styles and Formatting Task Pane - Show “Formatting in use” - Default Font is Times New Roman, 11 pt - Language is English (Canada) - Paragraphs Justified - Line Spacing Single - Widow/Orphan Control <input checked="" type="checkbox"/> Enabled
<input type="checkbox"/> Step 5 - Modify the “Normal” Style	- On the Styles and Formatting Task Pane - Place Cursor Over Normal and Click on the Arrow - Modify, Format, and Adjust Settings As Necessary
<input type="checkbox"/> Step 6 - Enable True Type Fonts	- Select Tools, Options, Save - Embed True Type fonts <input checked="" type="checkbox"/> Enabled
<input type="checkbox"/> Step 7 - Display Hidden Text	- Select Tools, Options, View - Ensure Hidden Text <input checked="" type="checkbox"/> Enabled
<input type="checkbox"/> Step 8 - Accept Changes and Delete Comments	- On the Reviewing Toolbar display Final Showing Markup - Show <input checked="" type="checkbox"/> Final <input checked="" type="checkbox"/> Comments <input checked="" type="checkbox"/> Ink Annotations <input checked="" type="checkbox"/> Insertions & Deletions <input checked="" type="checkbox"/> Formatting - Accept All Changes - Delete All Comments
<input type="checkbox"/> Step 9 - Turn-off Track Changes	- Click on the Track Changes Symbol on the Tool Bar - It is turned off when the highlighted orange box no longer appears.
<input type="checkbox"/> Step 10 - Remove Unwanted Styles and Formatting	- Review the Formatting of the text in the document