
Policy
Formatting
Guidelines for
Services
(Word 2003)

1. General Formatting Guidelines

- 1.1. Formatting in this context refers to the method of organising the text in a policy document.
- 1.2. There is no one correct way to format a policy; use the method that works best for your service.
- 1.3. The purpose of formatting is to visually organise and structure the content of a policy so that:
 - 1.3.1. Information in the policy is easy to access for those reading it
 - 1.3.2. There is clarity, structure and organisation of the information in the document
- 1.4. This can be done through:
 - 1.4.1. Using clear headings as signposts throughout the document
 - 1.4.2. Using a consistent format throughout the individual document as outlined below, and across the service's policy library
- 1.5. The guidelines below are based on Microsoft Word 2003. For services using a different version of Word, there may be some variation.
- 1.6. Please note that this is a brief guide to some formatting issues that may be encountered when adapting policy templates from the policy template library on drugs.ie.

2. Font Colours in Ana Liffey Drug Project Policies

- 2.1. Three font colours are used in the policy templates
- 2.2. Each font colour communicates a different instruction to the reader:
 - 2.2.1. **Font in blue refers to additional information communicated directly to the reader**
 - 2.2.2. **Font in red should be amended by the organisation to reflect local information and practice**
 - 2.2.3. Font in black should be reviewed and changed to suit the service if necessary.

3. Font Style and Size

- 3.1. The font used in the policy templates is 'corbel'.
- 3.2. For section headings, text is 'bold' and size 12.
- 3.3. For the body of text, text size is 10.

4. Header

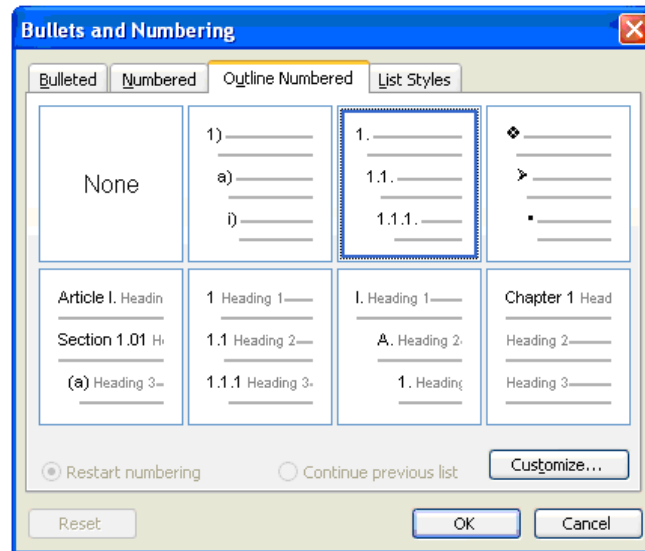
- 4.1. A header is the title bar that appears at the top of each page which is separate from the text. It includes the project name and the name of the policy
- 4.2. Each service should put the name of their service into the header. This can be done by
 - 4.2.1. Double clicking on the green section of the header box and writing the service's name in the green box.
 - 4.2.2. Once done on one page the header on every page will change

5. Formatting Copied & Pasted Text from Another Document

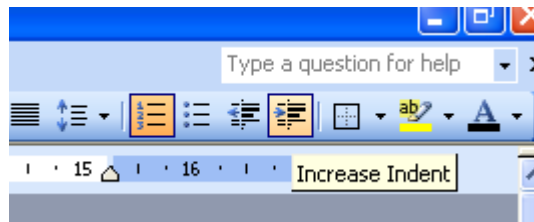
- 5.1. Where a large chunk of text is copied from another document such as a pre-existing policy or service website, the formatting is generally copied too. This may or may not cause some difficulties in the new document. If this occurs:
 - 5.1.1. Highlight the text that you pasted into the policy
 - 5.1.2. Go to the 'Format' menu option
 - 5.1.3. Select 'Styles and Formatting'
 - 5.1.4. Select the 'Clear Formatting' option from the list on the right of the page
 - 5.1.5. This will remove any unwanted formatting. You can then change it to the font / size required

6. Numbering

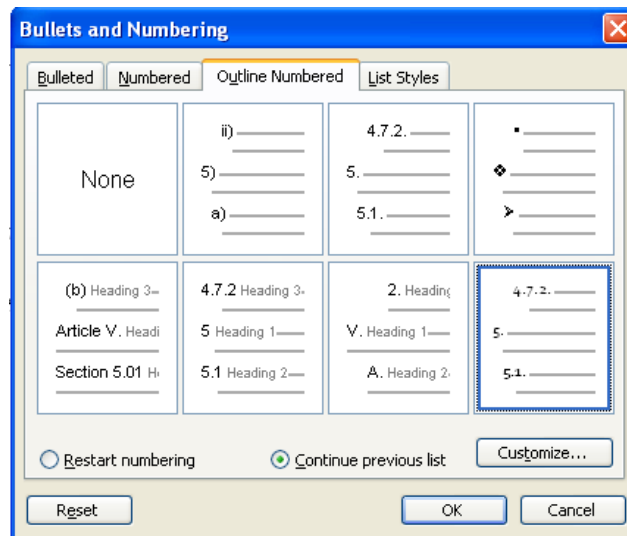
- 6.1. Policies follow a numbered outline.
- 6.2. Go to the 'Format' menu option
- 6.3. Select the 'Bullets and Numbering' option
- 6.4. Select the third tab 'Outline Numbered'
- 6.5. Double Click on the tab highlighted below



- 6.6. In the document to skip to the next number in a sequence of bullet points (e.g. from 1 to 2), press 'enter'
- 6.7. To create sub-points (e.g. to go from 1 to 1.1), select the 'Increase indent' button on the main toolbar (see image below)
- 6.8. To move back out from a sub-point to the main list of points, use the 'Decrease indent' button on the main toolbar
- 6.9. If these buttons are not visible, go to the 'View' option, then 'Toolbars' and ensure 'Formatting' is checked.



- 6.10. If you miss a line and the bullets seem to go back to '1' again, there are a few ways to get back into sequence
 - 6.10.1. You can delete the spaces between the text and the previous bullet until your new line of text follows on directly from your last line of text and press enter. This will get you back into sequence.
 - 6.10.2. You can go back into your 'Bullets and Number' tab and check the button at the bottom which states 'Continue Previous List'



7. Track Changes

- 7.1. This function can be used to document changes made to policies so that both the original and the changed text are visible. This may be useful to show changes to others that have been made or changes being proposed.
- 7.2. To track changes, select the "Tools" option and select "Track Changes" . Alternatively, pressing the Control, Shift and E keys at the same time will enable track changes.
- 7.3. Occasionally when editing a document 'Tracked Changes' appear as comments on the right hand margin (see example below) or the text may appear in a different colour with a line under it.



- 7.4. Changes can be accepted or rejected by right-mouse-click on the arrow or underlined text and selecting either the 'accept' or 'reject' option.
- 7.5. To turn off the 'Track Change' tool select the 'Tools' option, and select 'Track Changes'

8. Resources

- 8.1. Microsoft Support: <http://support.microsoft.com/?ln=en-ie> has a useful search function.
- 8.2. Microsoft Word helper: <http://office.microsoft.com/en-us/word-help/>
- 8.3. The Help menu in MS Word is also a useful tool