



# WATER QUALITY PLANNING BUREAU FORMATTING GUIDE

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## ABSTRACT

The purpose of this document is to provide specific formatting requirements for publishing documents within, and for, the Water Quality Planning Bureau (WQPБ). Many documents published by WQPБ are available to the public via the Web, journals, public review process, etc. This guidance will help to ensure a consistent format and approach to all document formatting for externally published WQPБ documents.

The DEQ Formatting Guide was updated with current formatting requirements to reflect the changes brought about by DEQ's upgrade to MS Office 2007. These requirements apply to Bureau staff and outside contractors who produce documents for WQPБ.

Revision History				
Revision No.	Date	Modified By	Sections Modified	Description of Changes
1	3/1/11			Original document produced by DEQ DP2 team.
2	2/14/13	C. Greeley	All	Changed settings and instructions to comply with the switch from Microsoft Office 2007 to 2010. Added a section on copying/pasting from Excel to Word.
3	5/8/13	C. Greeley	Section 14 was added and sections 15-18 were renumbered	Added information of using and inserting equations to Word documents.

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## **ACRONYMS**

DEQ	Department of Environmental Quality (Montana)
EPA	Environmental Protection Agency (US)
TMDL	Total Maximum Daily Load
WQPB	Water Quality Planning Bureau (DEQ)



## 1.0 FORMATTING REQUIREMENTS

This Style Guide describes the formatting requirements for WQPB documents and associated products generated by and for the Bureau. Formatting concerns aspects like margins, styles, spacing, and the presentation of tables and figures that are all part of refining a document. All WQPB documents must adhere to these formatting requirements and must be in MS Office Suite 2007-compatible format.

### 1.1 MARGINS

The margin sizes for documents should be as follows:

- Top = 1"
- Bottom = 1"
- Left = 1"
- Right = 1"
- Gutter = 0"
- Header = 0.5"
- Footer = 0.5"

### 1.2 STANDARDIZED FONT DESCRIPTION

Use the same font (Calibri, 11 point) throughout the whole document to be consistent.

### 1.3 PARAGRAPHS

- Use single spacing after punctuation marks.
- Use single line spacing with no additional spacing before or after any lines (before and after paragraph spacing should both be set to "0 pt.").
- Insert a blank line between all paragraphs, tables, figures, etc.
- Insert a "next page" section break to start a new section. Use "next page" or "continuous" section breaks only.
- Sections must begin on odd numbered pages and end on even numbered pages. Insert a blank page to accomplish this, if necessary.
- Do not indent headings or text. Indenting will be used only to set important key points apart (e.g., bullets, quotes, responses to public comments, etc).

### 1.4 PARAGRAPH HEADINGS

Paragraph headings are styled by level to alert the reader to the order of ideas within the document and to assist in the creation of the Table of Contents. Do not use automatic numbering for section headings as this causes issues when generating the Table of Contents. The format style for headings are as follows:

## **HEADING 1 - 1.0 TITLE**

Calibri, font size 18, font color automatic, bold, small caps, single spacing, align left with no indenting, no spacing before, 16-pt. spacing after

### **HEADING 2 – 1.1**

Calibri, font size 16, font color automatic, bold, small caps, single spacing, align left with no indenting, no spacing before, 6-pt. spacing after

#### **Heading 3 – 1.1.1**

Calibri, font size 14, font color automatic, bold, single spacing, align left with no indenting, no spacing before or after

##### ***Heading 4 – 1.1.1.1***

Calibri, font size 13, font color automatic, bold, italicized, single spacing, align left with no indenting, no spacing before or after

##### **Heading 5 – Emphasis within text**

Calibri, font size 11, font color automatic, bold, single spacing, no spacing before or after

##### **Heading 6 – Table Heading**

Calibri, font size 11, font color automatic, bold, single spacing, align left with no indenting, no spacing before or after

Insert table caption into the first cell in the table to allow repeat at top of each page if overlapping occurs.

##### **Heading 7 – Figure Heading**

Calibri, font size 11, font color automatic, bold, single spacing, align left with no indenting, no spacing before or after, preferred below figure

##### **Heading 8 – Formula/Equation Heading**

Calibri, font size 11, font color automatic, bold, single spacing, align left with no indenting, no spacing before or after

##### **Text – Normal**

Calibri, font size 11, font color automatic, single spacing, align left with no indenting, no spacing before or after, widow/orphan control on

## **1.5 HEADERS**

- Calibri, font size 10, align right, use bottom border line
- Headers will be the same for each document section and will only include the name of the document (which may be shortened as appropriate) and the section number or name. Be consistent within the document.

**Example 1:** Redwater TMDL – Section 1.0

**Example 2:** Redwater TMDL – Introduction

## 1.6 FOOTERS

- Calibri, font size 10, use three-column footer, use top border line
- Footers will be the same for each section except for page and section numbering.
- The date shall be aligned left in the format “month, day, year (mm/dd/yyyy).” Do not use automatic date.
- Section and page numbering aligned right (1-1, 1-2, 1-3, etc.). Do not use Page X of Y format.
- Front matter pages, excluding the title page and verso, shall be numbered i, ii, iii, etc.

## 1.7 BULLETED AND NUMBERED LISTS

- Bullets will be used when order is not a factor.
- Numbered lists will be used for sequential items.
- Do not use any special characters or pictures for bulleted lists.
- Do not use punctuation at the end of bulleted items that are not sentences. See the “Publication Editorial Guide,” Section 4.10–4.11 for more details.

## 1.8 COLOR USAGE

Color usage should be limited because of the cost of printing color documents. Color may be used in graphs and pictures, but it cannot be the sole source of identification in graphs and pictures. Remember, some people may not have access to color printers, while people with color blindness might have difficulty interpreting certain colors. Colors used should show up in a black-and-white document as various shades of gray. Be aware that pastel colors do not show up well, or at all, if printed in black-and-white.

## 1.9 TABLES

- Tables must be in Table Grid format. Table normal + Box: ( Single solid line, Auto, 0.5 pt Line width)
- Tables may not contain font smaller than 10 point.
- Tables should be labeled as “Table x-x:” in each document section: 1-1, 1-2, 2-1, 2-2, etc. Be consistent. Do not use automatic numbering.
- Table captions must be in the first row and be a part of the table. Cells in the first row may be merged. Apply Heading 6 format style for table captions.
- The second row of the table must contain the column headings and be bolded.
- For long tables, the first two rows of the table should repeat at the top of each page.
- Table size preferred width must be set to 100%.
- All references to tables within the text must be bolded.
- Do not use bookmarks to references in the text when numbering tables. This is considered automatic numbering and will cause problems.
- Do not use “keep with next” and “break before” options for tables.
- Tables can either be built in Word or Excel. Do not insert as a picture.

- Do not use color or highlighting in the tables or gray shading to emphasize cells or rows. If for some reason the table grid is removed (clean up of background formatting or added formatting from reference manager), and the table grid needs to be reapplied, it will remove all color and shading, which will need to be individually reapplied. For emphasis in a table used bold, italics, or underline, as these do not disappear during this process.
- Use word wrap in tables.

**Note:** To prevent a table row from being split between two pages, use “don’t allow rows to break across table” within the table properties. Do not insert a page break, as this will prevent the first two rows of the table from repeating on each page.

## 1.10 FIGURES

- Figures should be labeled as “Figure x-x:” in each document section: 1-1, 1-2, 2-1, etc. Be consistent. Apply Heading 7 format style for figure captions.
- Do not use automatic numbering.
- Insert a figure into the document as a .jpg.
- Figure numbers and labels are to be kept separate from the actual figure.
- Figures should be compatible with black-and-white printing when possible.
- All references to figures within the text must be bolded.
- For graphs and charts, color must be used in conjunction with symbols or other identifiers so the differences can still be seen.

## 1.11 GRAPHS AND CHARTS

If color is used then symbols or other identifiers must also be used so that differences can be identified if printed in black-and-white or to accommodate people with color blindness. See examples in **Figure 1-1** below.

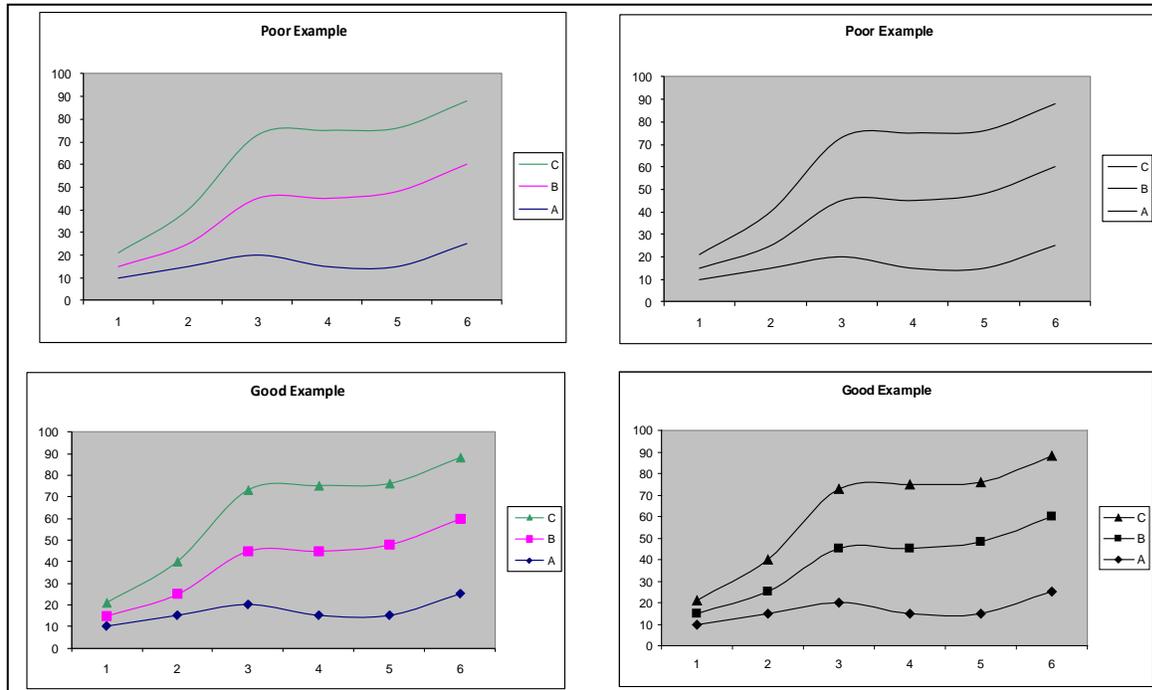


Figure 1-1. Example Graphs and Charts

## 1.12 PHOTOGRAPHS

- Photographs should be labeled as “Figure x-x:” in each document section: 1-1, 1-2, 2-1, etc. Be consistent. Apply Heading 7 format style for figure captions.
- Photographs should not be used without prior permission of copyright holder.
- Use color maps or photos within the text sparingly. When possible have all color maps, photos and other color pages in a separate section (e.g., appendices).
- Photos must be in .jpg format.

## 1.13 MAPS

- Maps must be in .jpg or .pdf format and compressed.
- Maps should be labeled in the same manner as figures; do not include map numbers and titles within the map itself.
- When possible, maps should be compatible with black-and-white printing.
- When the document includes more than three full-page maps, they must be included as attachments to the document.

## 1.14 EQUATIONS

At this time MS Word’s equation editor is not fully compatible with Adobe Acrobat and equations disappear when put into PDF format. Thus please use Microsoft Equation 3.0 to insert equations into documents.

- Go to Insert/ Object/ Object (**Figure 1-2**)

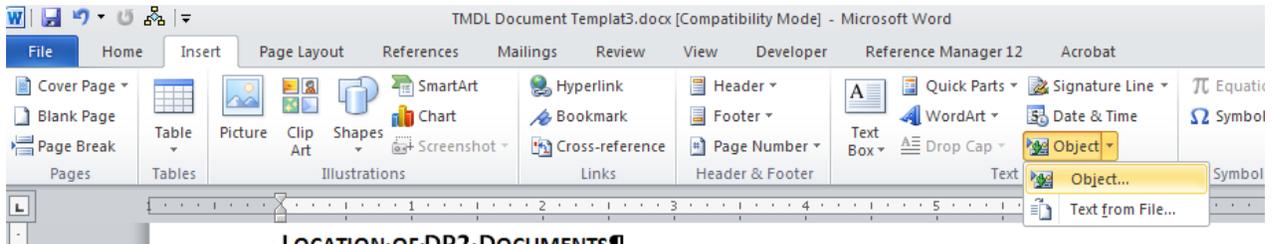


Figure 1-2. Setup for inserting an equation in Word

- Select Microsoft Equation 3.0 from the drop down list and hit OK. (Figure 1-3)

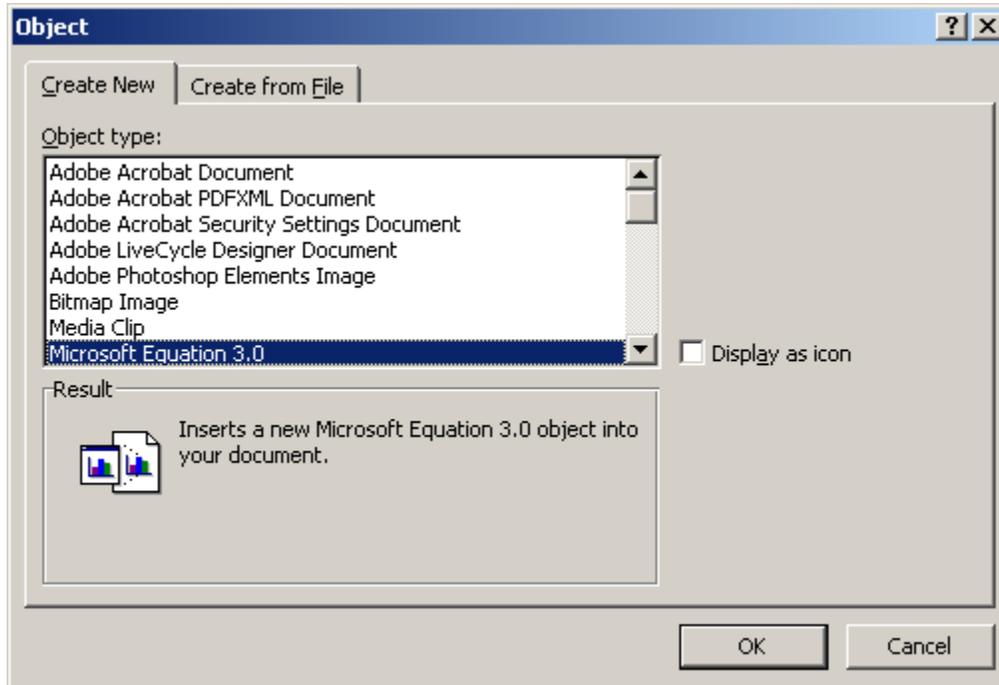


Figure 1-3. Equation drop down list

- Create your equation.

## 1.15 HIDDEN TEXT AND COPYING AND PASTING

### 1.15.1 Hidden Text

**Beware of Hidden Text when Copying.** Hidden text is text that has the hidden attribute applied. In Word, hidden is a text attribute just like italics or bold. You can control whether hidden text is displayed or printed. When the display of hidden text is turned off, the text is not deleted, its display is simply suppressed—it is not shown. When you later display hidden text, it will be displayed again. If you highlight a text area that contains hidden text and perform a copy-and-paste, the hidden text comes along for the ride.

Hidden text can be handy for a number of different reasons; for example, you may wish to print two different versions of a document. In one, you can omit portions of text. There's no need to save two copies on your hard drive. Unfortunately, hidden text is a nightmare for formatting. To eliminate this issue set the default Word option to display hidden text.

## Hidden text removal

Set Word options to display hidden text every time a document is opened by clicking the Microsoft File Tab and then clicking Word Options. Click Display, and under “Always show these formatting marks on the screen,” select the Hidden text check box.

Any hidden text will appear with a dotted underline. Highlight the text, go to “Font” and click on the little arrow box on the bottom right; and uncheck “hidden.” You must delete any hidden text in your document before formatting it.

## 1.15.2 Copy, Cut, and Paste

For cutting/copying and pasting text within a document, or between documents, set your Word Options to the following (Figure 1-4).

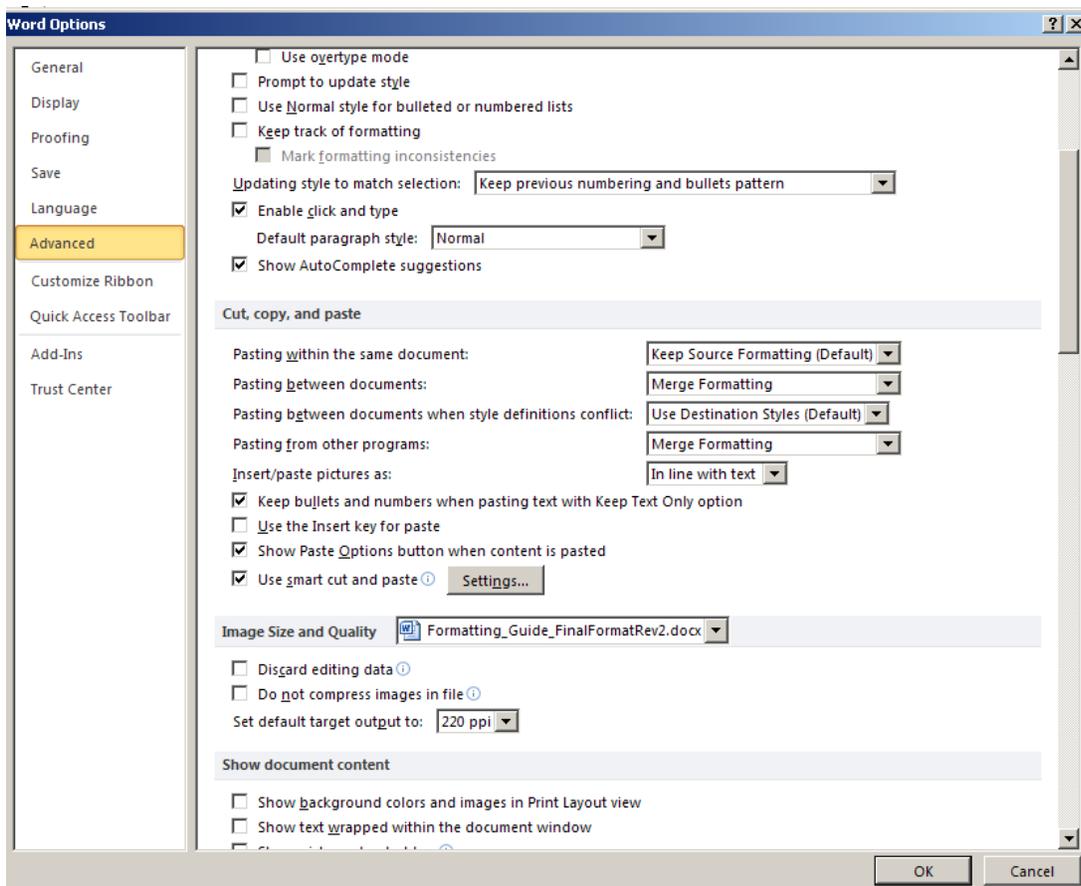
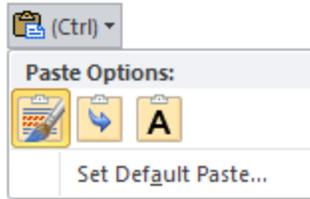


Figure 1-4. Word option settings

### 1.15.2.1 Cut/Copy and Paste in the Same Document.

When you cut/copy and paste within the same document you will see a Paste Options symbol . Clicking on this will give the following options (Figure 1-5):



**Figure 1-5. Paste options for copying and pasting within the same document**



Keep Source Formatting is recommended if pasting within the document and the formatting was correct.



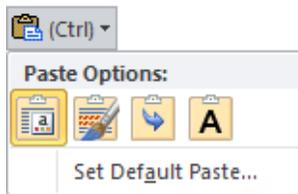
Merge Formatting will maintain any emphasis (bold, italics) but match the text to the formatting just before the insert.



Keep Text only will remove all the original formatting from the text you are pasting and remove any pictures, table grids, etc. You will need to apply the correct formatting.

### 1.15.2.2 Cut/Copy and Paste Between Documents

When you cut/copy and paste between documents you will see a Paste Options symbol . Clicking on this will give the following options (Figure 1-6):



**Figure 1-6. Paste options for copying and pasting between documents**



Destination Styles is recommended when pasting into a document that has the correct styles and formatting, as it will match formatting styles in the document.



Keep Source Formatting will keep the original formatting. It's most likely to cause problems, as styles between documents may not be the same.



Merge Formatting will maintain any emphasis (bold, italics) but match the text to the formatting just before the insert.

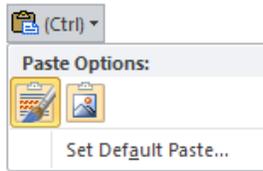


Keep Text Only will remove all the original formatting from the text you are pasting and remove any pictures, table grids, etc. You will need to apply the correct formatting

Set Default Paste will take you to Word Options.

### 1.15.2.3 Pasting Pictures

When you cut/copy and paste a picture you will see a Paste Options symbol . Clicking on this will give the following options (Figure 1-7):



**Figure 1-7. Paste options for copying and pasting pictures**



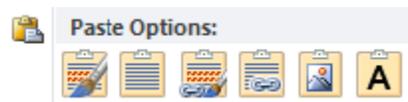
Picture is the preference.



Keep Source Formatting will keep the original formatting but may cause problems if the style applied to it was different than the document you are pasting into.

#### 1.15.2.4 Pasting from Excel

When you cut/copy and paste an excel table or graph you will see a Paste Options symbol . Clicking on this will give you the following options (**Figure 1-8**):



**Figure 1-8. Paste options for copying and pasting Excel tables in Word.**



Keep Source Formatting will keep the original formatting but may cause problems if the style applied to it was different than the document you are pasting into.



Use Destination Styles will format the table to match the style that applied where the text is pasted.



Link & Keep Source Formatting will preserve the look of the original text, and it maintains a link to the source file and updates the pasted text with any changes that are made to the source file. May cause problems if the style applied to it was different than the document you are pasting into



Link & Use Destination Styles will format the text to match the style that's applied where the text is pasted. It also maintains a link to the source file and updates the pasted text with any changes that are made to the source file.



Picture option inserts the text as an image.



Keep Text Only will remove all the original formatting from the text.

## 1.16 ATTACHMENT AND APPENDIX USE

Although there are no hard-and-fast rules governing whether to include information in an appendix or as an attachment, how appended items are applied relates to the parent report.

### 1.16.1 Appendices

Appendices are supplementary materials to a piece of writing but are not essential in understanding that piece of writing. They should be formatted and numbered to match the parent report. **Do not** dump miscellaneous items in the appendix just because you couldn't work it into the main text. **Do not** reformat a previously published report to fit it into the appendix. Instead, include it as an attachment and maintain its original formatting (see below). On the other hand, if you want to include corrections to small sections of previously published reports, the appendix might be the best place for it.

Use the appendices for:

- tabular information (e.g., raw data)
- explanations and elaborations that are too long, or inappropriate for, the main text
- references and resources lists
- glossaries and acronym lists

### 1.16.2 Attachments

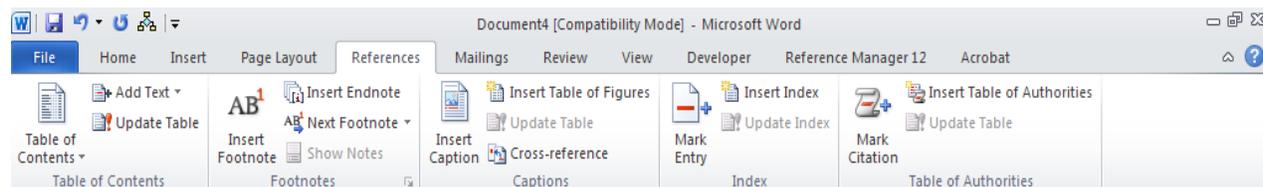
Attachments, like appendices, are information appended to a piece of writing but are stand-alone documents. Attachments shall maintain their original format. Include a cover page "Attachment A" (B, C, etc.) before the attachment.

Use attachments:

- to include items that don't fit into the bulleted categories under "Appendices" above;
- for previously published in-house reports included as a reference only;
- for reports published by other agencies or persons and used as a reference only; and
- for separate documents that require signatures (e.g., contracts).

## 1.17 FORMAT FOR REFERENCES FOR CONTRACTORS

Chicago style will be used for both the list of references and any citations within the text. Footnotes are not allowed, however. Citations can be easily inserted in MS Word, and formatted using "Insert Citation," and simplifies the efforts needed to put them in DEQ format (as shown in **Figure 1-9** below).



**Figure 1-9. Insert Citation**

## 1.18 ADDITIONAL FORMATTING FOR CONTRACTORS

The following formatting requirements are applicable to contractors that generate documents for the Bureau. The following requirements will reduce problems and simplify Bureau efforts when editing, printing, converting, and Web publishing and/or to improve Internet accessibility:

- Corporate logos shall not be included in any document. This includes corporate logos for cover pages, maps, figures, designs, etc.

- Cover pages may contain the DEQ logo, but corporate partnership and/or authoring will be done only in text format that is compliant with WQPB standardized font descriptions. DEQ reserves the right to remove corporate information from a final TMDL document.
- Corporate names shall not be included in any header or footer.
- Corporate reference shall not be used unless specifically for introduction, literature citation, or quotation within the document.
- Identification of map, figure, and design authors is allowed by printing of the corporate employee's name followed by a comma and then the corporate name. No logo is to be associated with the identification.
- No watermarks will be allowed in any document.
- Do not write protect/password protect or otherwise lock any documents provided to WQPB.
- Remove all hidden text.



## 2.0 TREATMENT OF DEQ TERMS AND OTHER COMMONLY USED WORDS

Table 2-1. Common DEQ Terms and Words

Word/Term	Notes/Examples
303(d) list / 303(d) List	lowercase “l” when not associated with a specific list; uppercase “L” when referring to a specific list; e.g., “the 2008 303(d) List”
7Q10	uppercase “Q”; no hyphens
bankfull	
bedforms	
beneficial use / beneficial-use support (adj.) / supports the beneficial use of	hyphenated when used as an adjective, e.g., “beneficial-use support”; otherwise not hyphenated
chlorophyll- <i>a</i>	hyphenated and the “a” in italics
cleanup (n., adj.) / clean up (v.)	"The cleanup took 10 days." "The cleanup job was arduous." "It will take 10 days to clean up the creek."
clearcut (n.) / clear-cut (v., adj.)	The 6-acre clearcut was near the stream. The results were not as clear-cut as we had hoped. Champion clear-cut the entire slope.
coalbed methane	
coldwater (compound adj.) / cold water	Coldwater fisheries is a beneficial use. They jumped into the cold water.
co-permittee	
cropland	
cutslope	
DEQ	Do not use MDEQ or MTDEQ; do not use “the DEQ”; “DEQ evaluated the site for violations.” “I work for DEQ.”
dewater / dewatering	
downcut / downcutting	
downgradient	not hyphenated
<i>E. coli</i>	always uppercase initial <i>E</i> and lowercase <i>coli</i> ; always in italics
email	no hyphen; but e-book, e-commerce, e-business, etc.
exceedance	preferred use with “a” rather than “exceedence” with an “e”
fillslope	
floodplain	
floodwater(s)	
gage	not gauge
groundwater	
hillslope	
in-channel	
inslope	
instream	
Internet	it’s a proper noun; capitalize it

**Table 2-1. Common DEQ Terms and Words**

<b>Word/Term</b>	<b>Notes/Examples</b>
land-applied (adj.) / land applied (v.)	hyphenated when used as a compound adjective: “the land-applied sludge”; two words otherwise: “the sludge was land applied”
land type	
land-use (adj.) / land use (v.)	hyphenated when used as a compound modifier: “land-use practices”; two words otherwise: “there are multiple land uses,” “land use is a primary concern”
mainstem	
naturally occurring (adj., adverb)	naturally occurring sediment; the sediment is naturally occurring
noncontact	one word adjective to describe cooling water
nondegradation	not hyphenated
<del>non-impairment</del>	do not use this word
nonpoint	not hyphenated
nonprocess	not hyphenated
off-site	We did an off-site compliance evaluation.
online	We posted the report online.
on-site	We did an on-site compliance evaluation.
outfall / Outfall 1 (2, 3, etc.)	lowercase to refer to outfall(s) in general; uppercase when referring to a specific outfall
outslope	
overland	
overstory	
overwiden	
permittee	
regulated community	not hyphenated
rainfall	
runoff	use one word to be consistent with most references; see “run-on”
run-on	hyphenate to be consistent with most references; see “runoff”
site-specific (adj.)	
snowmelt	
snowpack	
stakeholder(s)	
stormwater	
streambank	
streamflow	
streamside	
surface water	
understory	
upgradient	not hyphenated
upland	

**Table 2-1. Common DEQ Terms and Words**

<b>Word/Term</b>	<b>Notes/Examples</b>
U.S. Environmental Protection Agency	use on 1st reference; use “EPA” for all subsequent references, not “the EPA”
use/usage/utilize	use "use" in most cases; "usage" and "utilize" have limited use for DEQ purposes.
wadeable	not wadable
wasteload	
wastewater	
waterbody / waterbodies	
website	not “Web site” or “Website”; similarly, webcast, webinar, webmaster

