

Instructions for formatting tender submission documentation: RTF/Word CSV/Excel and Zip files

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Background

From 1 July 2010, ICT contracts plus successful supplier response documentation will be published on the Department's website. To meet online accessibility, usability and transparency requirements, every reasonable effort must be taken to supply all documentation as rich text format (RTF)/Word and comma separated value (CSV)/Excel files. RTF and CSV files are preferred to Word/Excel files as they are non-proprietary, however, it may be acceptable to use Word/Excel files if functionality, formatting or file size is an issue.

Creating Word files

Use Word's 'styles and formatting' to create and structure Word documents. At a minimum, all Word files should have:

- document property metadata
- a correct document structure
- alternative text tags for images
- no visible track changes
- an active table of contents (longer documents)

Steps for creating Word files

- create a Word file of the final document, ensuring that it includes all final changes and edits
- the content of the Word file should be structured and formatted using standard Word 'styles and formatting', e.g.
 - headings: at least top level headings Heading 1 to Heading 3
 - lists: Format > Bullets and Numbering
 - data tables: highlight first row > Table > Table Properties > Row tab > Options:
 - Allow row to break across pages [**do not** tick]
 - Check Repeat as header row at the top of each page [tick]
 - paragraph spacing - do not use 'enter' to create spacing: Format > Paragraph > Indents and Spacing > Space after or Space before
 - use left aligned text (do not use justified text)
 - do not use double spaces between sentences (Word adds a 1.5 space after full stops)
- ensure all track changes and comments are removed from the document
- if content needs to be masked (redacted) or removed from the document follow these steps to finalise the document in 'safe mode'

- accept all track changes and ensure no track change mark-ups are visible
- replace any withheld text with 'xxxx' or, where large pieces of text are removed, either
 - create a new document with only the information that is to be disclosed
 - replace the deleted information with the words 'text removed as per exemption(s) X (and Y)'
- copy, paste and save the content into a new Word document
- do not include extraneous graphics, images or designs in the Word file - images and graphics that are core to the document, e.g. referenced in the text, must be included
- add alt text to images: right click on an image > Format picture > Web > Alternative Text
- add document metadata: File > Properties > Summary > complete Title (mandatory), Author (mandatory), Company (mandatory) and Keywords (optional)
- include an active table of contents (longer documents): Insert > Reference > Index and Tables > Table of Contents
- 'File > Save As' the Word file to create a new version with reset date created, date modified, date accessed, revision number and editing statistics (File > Properties > Statistics)

Creating RTF files

RTF files must be optimised for the web to reduce their file size:

- before creating RTF files make this Windows registry change to minimise the file size of RTF files <http://support.microsoft.com/default.aspx?scid=kb;en-us;224663> (note: administrator rights are required to make this change on a networked PC)
- only include images and graphics that are core to the document, e.g. referenced in the text (extraneous graphics, images or designs may be removed)
- right click on an image in the Word document > Format picture > Picture > Compress > Apply to all pictures in document > Change resolution, Web/Screen > Options, Compress pictures > Options, Delete cropped areas of pictures
- File > Save As > Save as type > Rich Text Format (*.rtf)

Creating Excel files

All data in ICT contracts plus successful supplier response documentation must be provided in spreadsheets, preferably CSV files.

If providing Excel files:

- add document metadata: File > Properties > Summary > complete Title (mandatory), Author (mandatory), Company (mandatory) and Keywords (optional)
- add alternative text to all images that have informational value: right click on an image > Format picture > Web > Alternative Text
- do not add alternative text to decorative images
- give each worksheet an appropriate name in the tab at the bottom on the workbook
- label column and row headings
- include axis information on charts/graphs

Creating CSV files

Data is suitable to be provided in a CSV file if it:

- contains a single row of headings in the first row
- does not contain formulas
- see <http://data.gov.uk/blog/guidance-very-basic-standard-file-format-data>

To create CSV files from Excel files:

- ensure that the Excel file only includes one worksheet (tab); if the Excel file contains more than one tab the content of each tab will need to be saved as separate CSV files

- ensure that the text of all cells containing commas are enclosed in “ (“double quotation marks”)
- ensure that the first cell (A1) does not contain 'ID' (capital I capital D); cell A1, however, can contain lowercase 'id'
- File > Save as > Save as type: CSV (Comma delimited) (*.csv)
- open the CSV file to make sure that the content still makes sense without formatting etc

Creating ZIP files

ICT contracts plus successful supplier response documentation must be zipped together.

- in Windows Explorer, right click the RTF file > WinZip > Add to Zip file > Compression: Maximum (portable) > Add
- right click zip file > Properties > Summary > complete Title (mandatory), Author (mandatory) and Keywords (optional)

Naming RTF/Word, CSV/Excel and ZIP files

Use the tender or contract number as the file name for RTF/Word CSV/Excel and Zip files.

- file names: all lower case, no special characters or spaces, < 30 characters
- use the document title to identify individual files,
i.e. contractnumber-documenttitle.rtf,
e.g. dft4-1-116-agreement.rtf, dft4-1-116-financialmodel.csv, dft4-1-116.zip