



# MEMOS

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## 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.

## STARTING OUT

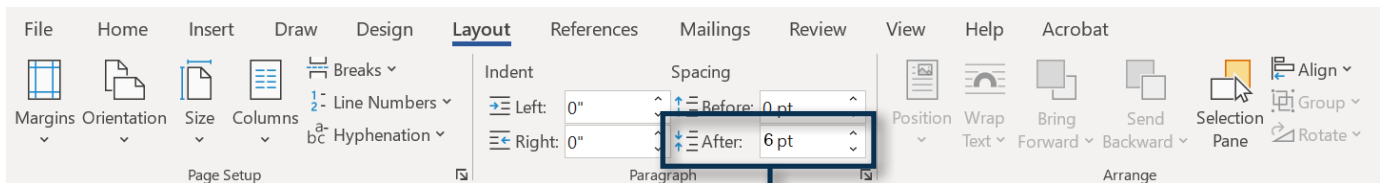
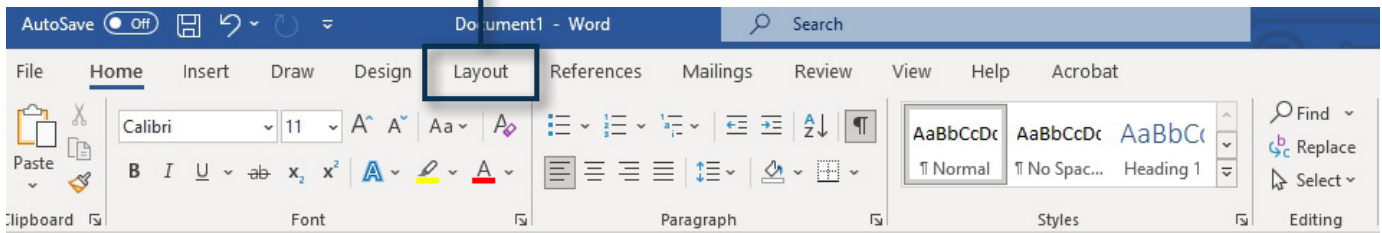
- Download the Technical Memo Template from our intranet site (<https://intranet.ctps.org/templates-home>) to ensure that you are working with the most up-to-date template. Rename your document according to the CTPS file-naming protocol. ([See How Should I Name My Document? on page 10.](#))
- Change “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 65](#) 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. 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+Enter]  
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 MPO Activities of the location of the final document. A member of MPO Activities will post the document to the meeting calendar.
- For all other website postings, Graphics will notify you directly. [Refer to the instructions on the intranet regarding web postings.](#)