

CHAPTER 1

INFocus

DOCUMENT STANDARDS

It is important that companies have standards and guidelines in place for document preparation and production. Documentation standards ensure that quality documents are produced in the most efficient manner.

In this session you will:

- ✓ gain an overview of the different types of business documents
- ✓ gain an understanding of the different types of software available for producing business documents
- ✓ gain an understanding of how to choose which word processing software to use
- ✓ gain an overview of who prepares business documents
- ✓ gain an overview of the various ways of speeding up document production
- ✓ gain an understanding of aspects to consider when developing document standards.

TYPES OF BUSINESS DOCUMENTS

A business must communicate with its customers, employees, suppliers, the government, and other businesses. This communication is mostly done through a variety

of business documents. As a result there are a large number and variety of documents produced by businesses.

A good way to understand the types of business documents produced in organisations is to examine the needs and requirements of the various parts of an organisation, and to group documents according to the functions performed.

Management

Management requires documents that help make business decisions and help keep the business running. These types of documents include:

- Production reports
- Sales reports
- Meeting minutes

Sales and Marketing

Sales and Marketing require documents that help promote the business and its products to the customers. These types of documents include:

- Price lists and order forms
- Product brochures
- Sales reports
- Bulk mail-outs to customers

Human Resources

Human Resources deal with a variety of matters regarding employees. They require a very broad range of documents including:

- Job descriptions
- Employment forms
- Training manuals and guides
- Job procedures

Manufacturing and Production

Manufacturing and Production produce the goods and services sold by the business and require documents that help them produce these goods and services on time and in the most cost-effective manner. The types of documents they require include:

- Production reports
- Supplier price lists and forms
- Product specifications and procedures

Administration and Accounts

Administration and Accounts are responsible for ensuring that the day-to-day operation of the business proceeds smoothly, that customers are invoiced, that bills are paid, that money is collected and banked, and the like. They require a variety of documents including:

- Memos, faxes and letters
- Sales reports
- Accounting reports

CHOOSING APPROPRIATE SOFTWARE

The large number of documents required for businesses to operate can be produced by a variety of software packages and applications. In fact, many of the documents can be produced by

more than one type of software application. It is useful to know about the role and function of the various software applications.

Type of Document	Typical Software Application(s)	Level of Sophistication	Comments
Production reports	Spreadsheets Database Word processing Specialised production software	Low	For internal communication only
Sales reports	Spreadsheets Database Word processing Accounting software	Low	For internal communication only
Meeting minutes	Word processing	Low	For internal communication only
Price lists	Spreadsheets Database Word processing Accounting software Desktop publishing software	Medium	For internal use as well as external communication to customers
Order forms	Word processing Desktop publishing software	Low	For customer use
Product brochures	Word processing Desktop publishing software	High	For customer use
Merge letters	Spreadsheets Database Word processing Accounting software	Medium	Used to communicate to customers
Job descriptions	Word processing	Medium	For prospective job applicants
Employment forms	Word processing Desktop publishing software	Low	For internal use only
Job procedures	Word processing	Low	For internal use only
Supplier price lists	Spreadsheets Database Word processing Accounting software	Low	For internal use only
Product specifications	Database Word processing Accounting software	Medium	For customer use
Memos, faxes, letters	Word processing	Low	For internal and external communication
Accounting reports	Spreadsheets Database Word processing Accounting software	Low	For internal use

CHOOSING WORD PROCESSING SOFTWARE

Word processing software allows you to work with text in order to create documents. This usually involves functions such as creating, formatting and deleting text and working with

other elements associated with text documents such as tables. These days there are a range of software options for working with text and it's important to consider which one works best for you.

Microsoft Word

Microsoft Word is a word processing software program created by Microsoft and is part of a suite of products known as Microsoft Office. It was originally launched in the early 1980s and today is one of, if not the most popular word processing software program as it contains a large variety of tools and features for creating a variety of text-based documents. You can use Microsoft Word to create and save text-based documents, spell check existing text, apply font formatting, insert pictures and much more. While Microsoft Word is primarily used as a desktop application (meaning it is installed and run on your desktop computer), Microsoft also provides Word Online and the Word mobile app. Word Online can be accessed and used from the browser window of any device connected to the internet, while the Word mobile app can be downloaded and used on any mobile device such as a mobile phone or a tablet.

Web Based Word Processing Apps

There are a number of different word processing apps that can be used online. For example;

Google Docs – Google Docs is used in conjunction with Google Drive which is Google's cloud file storage service. You can sign up for Google Drive for free and you will receive 15 GB of storage allowance which is used across Google Drive, Gmail and Google Photos. If you require more storage you can pay an annual or monthly fee to receive more storage. Google Docs is a free word processing app available to use online or as a downloadable app on your mobile device. It is part of Google's office suite. If you wish to use Google Docs you must first sign up using a Gmail account. Once you have signed up and signed in you are ready to start creating and working on documents. Google Docs contains less advanced features and tools than Microsoft Word, however it does allow you to get Add-ons which are apps that you can use in conjunction with the program in order to increase functionality. For example, if you wish to add a table of contents, this functionality is not available in Google Docs but if you get an add-on for creating a table of contents you can create and work with a table of contents in Google Docs.

DropBox Paper - DropBox Paper is used in conjunction with DropBox, a cloud file storage service. DropBox Paper has a much more minimal interface than Microsoft Word and Google Docs and has less functionality for working with advanced word processing features. However, there is an emphasis on working collaboratively and there are many tools for commenting and sharing your files. You can export DropBox Paper files to a PDF so that you can open them in PDF viewers such as Acrobat or you can export as a Microsoft Word file so that you can open and work on the file in Microsoft Word. You can also import files of a range of different file types, including Microsoft Word.

Device Specific Word Processing Apps

Apple devices usually come with a word processing app that can only be used on Apple devices. Currently, Apple Mac computers come with the **TextEdit** app which you can use for creating and editing text files. If you are using an iPhone or iPad the **Pages** app may be included on your device by default. You can use this app to convert existing text documents to other formats, create and edit HTML documents and the like. Mobile android devices (any mobile device, laptop or desktop computer not created by Apple) may also contain word processing apps by default. For example, Samsung phones come with the Polaris office suite which can be used to work with Microsoft Word files among other file types from the Microsoft suite.

Choosing The Right Software For You

Before you begin creating and working with text documents, it's important to decide which software program is most appropriate for your needs. If you want to create a professional or long document it is best to use a program like Microsoft Word that contains more advanced formatting and editing features. If you want to create a short document that doesn't require much formatting, a program like GoogleDocs or DropBox Paper may be more suitable. If you don't have access to a laptop or desktop computer, you can use one of the many mobile text editing apps as discussed above. Remember that most text editing software can be used in conjunction with each other. For example, you may begin creating a file in DropBox paper before exporting it to Microsoft Word where you can use more advanced formatting and editing features before importing it again to DropBox for sharing with others.

WHO PREPARES BUSINESS DOCUMENTS

With such a diversity of business documents in use today, and with a variety of software applications available to create these documents, it is obviously not possible for one person or

department to assume total responsibility for document preparation. So, who does prepare documents in a business?

Standard Business Documents

Standard business documents are relatively simple in layout, and are authored, printed and distributed by the same person within a company. These documents are usually memos, letters, faxes, minutes of meetings, and the like. The focus is more on the content and the subject matter than on the layout and overall appearance of the document.

These would form the bulk of the documents produced within a company.

These documents are usually produced on a personal computer or laptop and printed on the author's printer. Increasingly, these documents are circulated internally via email rather than through the mail system.

Large companies often have directives that specify how these documents should be laid out. In small to medium companies, however, the look and layout of these documents is less formal and left to the discretion of the author. Many authors simply use the templates found in word processing applications to assist them in the layout of these types of documents.

Specialised Business Documents

Specialised business documents are by nature more complex and difficult to produce. These types of documents are usually colour brochures promoting the company and its products, annual reports for shareholders and investors, and the like. Often they incorporate pictures and artwork (graphics), and are produced as full-colour documents on high quality paper.

These documents are usually produced by a team of people. Some of these people work within the company, while others are contracted by the company to perform a specific job. For example, the content is usually prepared by people within the company that are expert in the products and services of the company. However, these people do not usually have professional design and printing skills so these aspects of document production are outsourced to an external company that specialises in layout, design and printing.

Generally, there are three steps to the production of these types of documents.

1. The text (also referred to as the 'copy') is prepared by the subject experts within the company.
2. The text, relevant pictures and general information about the purpose of the document is handed over to a designer to lay out the design, choose the appropriate colours and fonts, and so on.
3. The completed document is then provided in an electronic format to a printing company that prints the document in the quantities required by the company.

Naturally, there should be someone within the company who manages and coordinates this process. If these documents are for sales and marketing purposes, it is usually someone from the marketing department who undertakes this role.

SPEEDING UP DOCUMENT PRODUCTION

Most software applications that are used to produce business documents contain a number of features that can speed up the production of documents. There are also things that can be

done within a company to ensure efficient and fast document production. Some of the software features and company tasks are detailed below.

Features Found In Software

Macros

Originally, macros were simply recorded keystrokes that could be stored and executed over and over again. These were used for the production of documents, or parts of documents, that remained the same from document to document. The keystrokes, such as a series of sequential steps to complete a specific task or perform an action, were recorded when the first document was created. They could then be replayed to create more of the same types of documents. Today, macros still perform the same role. However, they are now based on sophisticated programming commands and languages and, while still relatively easy to use, offer much more power than earlier keystroke macros.

Themes

Themes let you create professional-looking documents with a co-ordinated set of colours, fonts and backgrounds in a flash. By applying one of the 40 built-in themes you can change the overall look of your document immediately. To make the best use of themes, however, you will need to apply **styles** (via the **Home** tab) to the various elements in the document.

Templates

One of the most tedious tasks in document production is designing the layout and overall presentation of a document. A template allows you to create a document based on an existing design and can save much production time. Templates can also be created from an existing document. The existing document is converted into a template and the design of that document can then be used to produce future documents.

Styles

Longer documents require consistency in the look of their headings, text, tables, and the like. **Styles** in word processing applications allow you to store a set of formatting attributes and then apply that formatting to different parts of the document. For example, you can create a style for main headings that consists of a range of formatting attributes, such as a specific font style, font size, adjusted paragraph spacing, etc. You can then apply that style to any text that you want to use as a main heading. If you later want to change the way those headings look, you only need to change the style and all of the headings will automatically update. Styles can save a considerable amount of time in document production.

Building Blocks

You can recycle content that you use constantly in your business, such as contracts, agreements, procedures and the like, by creating and using building blocks. For example, you might save your company's contact information as a building block in the **Quick Parts** gallery, and whenever you require that information, you can simply open the **Quick Parts** gallery and select the desired building block.

Speeding Up Document Production

Guidelines and standards

One of the most time-consuming aspects of document production is deciding how you want it to look – what fonts to use, colours, margin settings, headers, footers, and so on. It is extremely beneficial for any company to have a set of procedures and guidelines that define these aspects of document production for authors. Every company, even the smallest, will decrease production time by having a set of standards in place. In addition these should be incorporated into a standard set of company templates (see above) which can be easily accessed by authors.

ESTABLISHING DOCUMENT STANDARDS

It is important for all companies, both small and large, to have a set of guidelines and standards in place for document production and handling. These guidelines ensure a consistent look and

feel amongst the documents, allow new employees to become quickly acquainted with document production, and convey a professional image of the company to its customers and clients.

Things To Consider When Developing Document Standards

Storage

It is important that company documents can be located and accessed by relevant people. Documents can be stored on a personal computer or on a network server. If company documents are stored on a personal computer, and if those documents are to be made available to other users, then the documents should be stored in shared folders that are accessible to other users on the network. Generally, it is advisable for public documents to be placed on a network server if one exists. Some liaison with the network administrator may be necessary to ensure that document authors have appropriate access rights to the network.

Folder and file naming

It is important that the company implements a standard for file and folder naming. Using proper guidelines ensures that important documents can be found easily in the future. A handy technique used in document production is to include the file name and folder path somewhere in the document. This can be in the header, the footer, on the front or last page, or even in the document properties. The desired method should be clearly detailed in the company guidelines.

Templates

Detailed information should be placed in the guidelines with regard to what templates are available for document production. There should also be instructions explaining how the templates are to be used, where they can be accessed, and appropriate information detailing what can and what can't be altered in the templates.

Company logos, colours and general branding

Most companies have an established logo, colour scheme and other form of branding. The guidelines should clearly indicate what these are, what the minimum and maximum sizing for logos is, the placement of logos, the colour of the text, and other branding issues.

Styles

The document guidelines should contain information about the size of font, line and paragraph spacing, and indents that are to be used for the body text (the general text), headings, table text, figure text, captions, and other text in the document.

Output

The document guidelines should include detailed information about how the document should be produced. For example, many computer printers will print in draft mode and quality mode. The guidelines should indicate when it is appropriate to print the document in quality mode (which is more expensive and sometimes slower). Also, it is increasingly popular to transmit documents electronically via email. The guidelines should indicate when documents are to be printed on paper and when they are to be transmitted electronically.

Review of standards

It is not possible to lock in standards forever – needs and technology are changing too fast to make this possible. Consideration should be given, therefore, as to how frequently the standards will be reviewed and how the amendments will be provided to the user.

CHALLENGE EXERCISE

Document Standards

Tasks:

Completed:

Before starting this exercise you MUST have completed all of the topics in the chapter Document Standards...

- 1 In the space provided on the next page, list the three types of documents that a business may need to produce
 - 2 In the space provided on the next page, name the typical application that you could use to create the following documents:
- Accounting reports
Job descriptions
product brochures
Price lists

Hint: Choose your answer from the list provided...

- 3 In the space provided on the next page, list two general features found in software that speed up production
- 4 In the space provided on the next page, list two aspects that you might consider when establishing document standards
- 5 Photocopy the next page with your completed answers

Files required for exercise:

None

Files/work created by student:

Photocopy of your answers from the next page

Exercise Completed:

CHALLENGE EXERCISE WORKSPACE

Document Standards

- 1 What are three types of documents that a business may need to produce?
 - 1.
 - 2.
 - 3.
- 2 For each of the following document types, what is the typical application that you could use to create them?

Choose your answers from: Desktop publishing software, spreadsheet software, accounting software, word processing software. Use each option once only...

Accounting reports:

Job descriptions:

Product brochures:

Price lists:
- 3 List two general features found in software that speed up production
 - 1.
 - 2.
- 4 What are two aspects that you should consider when establishing document standards?
 - 1.
 - 2.

CHAPTER 2

SAVING DOCUMENTS

INFocus

Word enables you to save your documents and templates in a variety of **file formats**, in different **file locations** and under as many different **file names** that you can manage! By understanding how Microsoft saves and stores files, you can save copies of the same documents, store those copies in different locations, save documents in different formats depending on the required output, as well as use the documents to create other types of documents. You can also select which version of Word you want to save as, so that the document is compatible with earlier versions of Word.

In this session you will:

- ✓ gain an understanding of good naming conventions for files and folders
- ✓ gain an understanding of version compatibility
- ✓ learn how to save a document for version compatibility
- ✓ learn how to save a document in **PDF** format
- ✓ learn how to save a document with thumbnail preview.

UNDERSTANDING NAMING CONVENTIONS

These days, the storage devices on your computer are typically huge in capacity – they allow you to store an almost unlimited number of document files. So, unless you have an efficient

system for naming your files and folders, you may have a difficult time finding a document that you created last week, last month, or last year.

Technical Considerations

When you save the work that you are doing on the computer, it is placed into an electronic file. In order to retrieve the file for later use the computer needs to be able to identify the file using three components: the **file path**, the **file name**, and the **file extension**.

A computer file is normally stored in a folder on a storage device accessible to the computer. Folders can have sub-folders, which in turn can also have sub-folders. So, a **file path** (i.e. its *location*) is identified by specifying the device letter followed by a colon, and then the folder hierarchy in which it can be found. Each element in the path is separated by a backslash (\). For example, when you use the default *Documents* location to save a letter, its actual file path will be something like:

C:\Users\Fred\My Documents

The **file name** is something that you create and can be up to two hundred and fifty five characters in length. It can include spaces but there are special punctuation characters that have specific meanings to the computer and these cannot be used. These include the question mark (?), quotation mark ("), slash (/), backslash (\), greater than (>), less than (<), asterisk (*), pipe (|), and colon (:).

The **file extension** is usually three or four characters in length and is automatically provided by the computer based on what kind of **file type** you decide to save your file as. It is separated from the file name using the full stop character.

Your Responsibility

It is your choice both *where* you choose to save a file and *what* it should be called. You can save a file in the default location (**Documents**) or create your own hierarchy of folders and sub-folders for your files. If you create your own folders, they too will need to be named and the same technical considerations above apply to folder names as for file names.

Before You Save A File...

Many companies, universities, schools, and other organisations already have policies and standards in place associated with electronic files. For example, if you are creating files at work, there is a good chance that they will need to be saved on a network and there may even be specific instructions for naming those files. Even at home some people have initiated procedures for storing homework files (oh, and probably also music and video files!) on an external drive.

So, before you save a file, check to see whether there are any guidelines, policies or procedures in place where you are.

Some General Guidelines

If you can't locate any specific procedures for naming files where you are then here are some general guidelines you should follow (you'll find many more by Google searching *file naming conventions*):

- ✓ Even though you have two hundred and fifty five characters at your disposal for a file name, keep your names short and meaningful (long names take ages to type and are difficult to fully display).
- ✓ Choose whether you want to separate words in the file name with spaces, dashes, or underscores, then stringently adhere to whatever you decide and remain consistent.
- ✓ If you are using a date in the file name always state the date back-to-front using four digits for the year and two each for the month and day (e.g. YYYYMMDD). The computer files things alpha-numerically and this is the best way to ensure files are displayed in the correct order.
- ✓ If you are using a personal name in a file name start with the family name first and then the initials.

Use an underscore at the start of a file name if you want that file to "float" to the top of the alpha-numeric listing – this is handy for temporary or draft files still subject to review and final editing.