

CHAPTER 1

DOCUMENT STANDARDS

INFocus

ITU303_W892

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 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
- ✓ gain an understanding of good naming conventions for files and folders
- ✓ gain an understanding of file formats and version compatibility.

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 it make business decisions and help it 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	<ul style="list-style-type: none"> • Spreadsheets • Database • Word processing • Specialised production software 	Low	For internal communication only
Sales reports	<ul style="list-style-type: none"> • Spreadsheets • Database • Word processing • Accounting software 	Low	For internal communication only
Meeting minutes	<ul style="list-style-type: none"> • Word processing 	Low	For internal communication only
Price lists	<ul style="list-style-type: none"> • Spreadsheets • Database • Word processing • Accounting software • Desktop publishing software 	Medium	For internal use as well as external communication to customers
Order forms	<ul style="list-style-type: none"> • Word processing • Desktop publishing software 	Low	For customer use
Product brochures	<ul style="list-style-type: none"> • Word processing • Desktop publishing software 	High	For customer use
Merge letters	<ul style="list-style-type: none"> • Spreadsheets • Database • Word processing • Accounting software 	Medium	Used to communicate to customers
Job descriptions	<ul style="list-style-type: none"> • Word processing 	Medium	For prospective job applicants
Employment forms	<ul style="list-style-type: none"> • Word processing • Desktop publishing software 	Low	For internal use only
Job procedures	<ul style="list-style-type: none"> • Word processing 	Low	For internal use only
Supplier price lists	<ul style="list-style-type: none"> • Spreadsheets • Database • Word processing • Accounting software 	Low	For internal use only
Product specifications	<ul style="list-style-type: none"> • Database • Word processing • Accounting software 	Medium	For customer use
Memos, faxes, letters	<ul style="list-style-type: none"> • Word processing 	Low	For internal and external communication
Accounting reports	<ul style="list-style-type: none"> • Spreadsheets • Database • Word processing 	Low	For internal use

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.

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 are going to have one heck of a time finding a document that you created last week, or 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 *My 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 255 characters in length. It can include spaces but there are special punctuation characters that have other meanings to the computer that cannot be used. These include the question mark (?), quotation mark (“), slash (/) and backslash (\), greater than (>) and less than (<), asterisk (*), pipe (|), and colon (:).

The **file extension** is usually 3 or 4 characters in length and is automatically provided by the computer. 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 (**My 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 255 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

UNDERSTANDING VERSION COMPATIBILITY

Word 2010 saves documents in a format compatible with both **Word 2010** and **Word 2007**. Word also allows you to save your document in other file formats such as a web

page or as a PDF document. You can also save documents with **backward compatibility**, enabling the document to be opened and read by those using a version of Word earlier than **Word 2007**.

File Compatibility

Word 2007 underwent a major change in the way that it internally saved documents. Basically, document files saved in versions of Word prior to Word 2007 were saved as **binary** files – binary files are a closed file format that cannot be readily opened or modified without the same software used to create them.

Since Word 2007, document files are saved as **XML (eXtensible Markup Language)** files. Without going into too much detail, **XML** was originally developed as a more flexible and open file format which theoretically allows a lot more sharing and manipulation of content and data.

Documents prior to Word 2007 are identified with a **.doc** file extension, while XML files saved in Word 2007 and Word 2010 can be identified with a **.docx** file extension.

Any of the Word file types you save in Word 2010 will be based on an **XML** structure.

Other File Formats

Word enables you to save your documents in a range of other file formats. This ensures that anyone can view your document even if they don't have Word installed on their computer. In Word 2010, you can save your documents in the following file formats.

- **Word 2010 documents and templates.** By default, Word 2010 documents are saved with the file extension **.docx**, and templates are saved with the file extension **.dotx**. The **x** indicates that the file is based on XML.
- **Macro-enabled documents and templates.** Documents and templates that contain macros must be saved as a **macro-enabled document (.docm)** or **macro-enabled template (.dotm)**.
- **Word 97-2003 documents and templates.** To enable others using Word 2003 and earlier to view your documents and templates, save your document as a **Word 97-2003 Document (.doc)** and save your templates as a **Word 97-2003 Template (.dot)**.
- **PDF and XPS documents.** To ensure that anyone can view your document, even if they don't have Word installed, and to preserve the layout and formatting of your document, you can save the documents as a **portable document format (.pdf)** or **XML paper specification (.xps)** document. Anyone with a PDF viewer can read these document types. It is common to save a document as a PDF, for example, when making documents available for others to download from the internet.
- **Web-based file formats.** Where you want to make the document or its content available on the internet, such as for creating a website, or for editing in a HTML editor, you can save the document in a range of web-based file formats, including **HTML** and **MHTML**.
- **Rich text format.** To ensure that a document and its formatting can be viewed in a program specific to a particular platform (such as Mac) or operating system (such as Unix), you can save the file as a **rich text format (.rtf)**. The file can then be edited in the destination program, and the program will interpret and apply the formatting accordingly.
- **Open Document format.** Saving a document in this format will ensure that those who use **open source** (free) software can view and edit the document. Most software produced as open source will support this format. Note that you may lose some formatting when saving in this format.

DOCUMENT STANDARDS

Practice Exercise

Tasks:**Completed:**

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

- 1** Open the document called **PE_Document Standards.docx** (it can be found in the same folder as the student files)
- 2** Answer the questions which are included in the document
A sample of the questions is shown on the next page...
- 3** Use **Save As** to save the document as **PE_Document Standards (Completed).docx**

Files required for exercise:

PE_Document Standards.docx

Files/work created by student:

PE_Document Standards (Completed).docx

Exercise Completed:

DOCUMENT STANDARDS

Practice Exercise

Document Standards

- 1 What are three general 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 Which type of document is likely to be authored, printed and distributed by the same person within a company – documents with a low level of sophistication or documents with a high level of sophistication?

Answer:
- 4 What are two general features found in software that can help speed up document production?
 - 1.
 - 2.
- 5 What are two aspects that you should consider when developing document standards?
 - 1.
 - 2.

CHAPTER 2

MULTIPLE DOCUMENTS

INFocus

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A distinct advantage of working with a word processing application is the ability to work with multiple documents simultaneously. For instance, having multiple documents open at the same time can be useful if you are creating a summary report, drawing information from a number of different source documents.

To assist you in working with multiple documents, you are able to easily switch between them or display multiple windows on the screen side-by-side or tiled underneath each other.

In this session you will:

- ✓ learn how to open multiple documents simultaneously
- ✓ learn how to switch between multiple open documents
- ✓ learn how to arrange all open documents
- ✓ learn how to view two documents side by side
- ✓ learn how to use synchronous scrolling
- ✓ learn how to reset the window position when using side by side view
- ✓ learn how to save a document for an earlier version of **Word**
- ✓ learn how to save a document in **PDF** format
- ✓ learn how to save a document as plain text
- ✓ learn how to save a document with thumbnail preview
- ✓ learn how to add properties to a document.

OPENING MULTIPLE DOCUMENTS

Opening multiple documents in Word enables you to work with them at the one time; very convenient if you want to locate information from a document created previously and insert it into

another document. There are several ways to open a document in Word – you are probably already familiar with opening one document at a time – now let's see how to **open multiple documents**.

Try This Yourself:

Open File

Before starting this exercise you should close all Word files that are currently open...

- 1 Click on the **File** tab and click on **Open** to display the **Open** dialog box

- 2 Navigate to and double-click on **Course Files for Word 2010** in the **Folders** list

This will display the files available in this folder...

- 3 Locate and click on **W817 Multiple Documents_1.docx** to select it, then click on **[Open]**

The one document will now be open. More documents can be opened at any time, either individually or several at the same time...

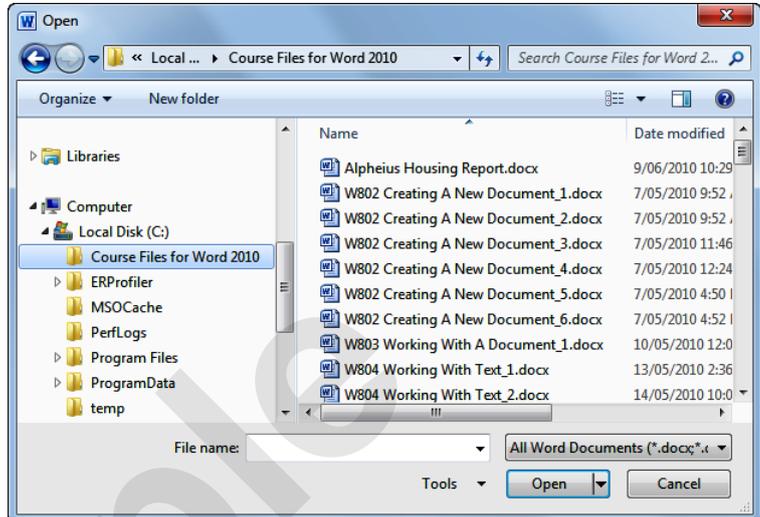
- 4 Repeat step 1 to display the **Open** dialog box

- 5 Click on **W817 Multiple Documents_2.docx**

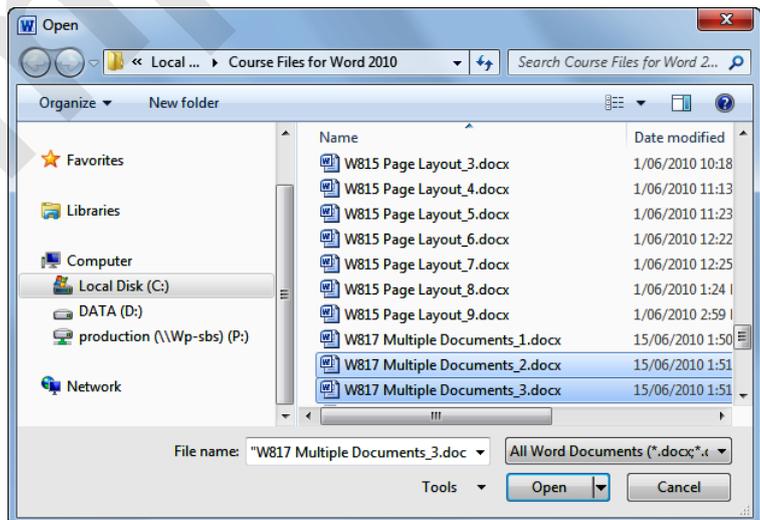
- 6 Hold down **[Ctrl]** and click on **W817 Multiple Documents_3.docx**

The two documents will now be selected...

- 7 Click on **[Open]** to open both documents simultaneously



2



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For Your Reference...

To **open multiple documents** simultaneously:

1. Click on the **File** tab and click on **Open**
2. Hold down **[Ctrl]** and click on the documents to open
3. Click on **[Open]**

Handy to Know...

- To select a range of contiguous files in the **Open** dialog box, click on the first file then hold down **[Shift]** and click on the last file in the range – all files in between will be selected.
- You can display the **Open** dialog box by pressing the keyboard shortcut **[Ctrl] + O**.