

## 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. As part of producing documents, there will most likely be times when you need to view the properties of a document to see information such as who created the document and when it was last edited. You may even want to add some properties to it yourself.

**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
- ✓ learn how to view document properties
- ✓ learn how to specify document properties
- ✓ learn how to insert properties into a document.

# 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.

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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
<b>Production reports</b>	Spreadsheets Database Word processing Specialised production software	Low	For internal communication only
<b>Sales reports</b>	Spreadsheets Database Word processing Accounting software	Low	For internal communication only
<b>Meeting minutes</b>	Word processing	Low	For internal communication only
<b>Price lists</b>	Spreadsheets Database Word processing Accounting software Desktop publishing software	Medium	For internal use as well as external communication to customers
<b>Order forms</b>	Word processing Desktop publishing software	Low	For customer use
<b>Product brochures</b>	Word processing Desktop publishing software	High	For customer use
<b>Merge letters</b>	Spreadsheets Database Word processing Accounting software	Medium	Used to communicate to customers
<b>Job descriptions</b>	Word processing	Medium	For prospective job applicants
<b>Employment forms</b>	Word processing Desktop publishing software	Low	For internal use only
<b>Job procedures</b>	Word processing	Low	For internal use only
<b>Supplier price lists</b>	Spreadsheets Database Word processing Accounting software	Low	For internal use only
<b>Product specifications</b>	Database Word processing Accounting software	Medium	For customer use
<b>Memos, faxes, letters</b>	Word processing	Low	For internal and external communication
<b>Accounting reports</b>	Spreadsheets Database Word processing Accounting software	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?

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## 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.

# VIEWING DOCUMENT PROPERTIES

There are several ways to view document properties. The **Properties** pane via **Info** in **Backstage** view displays basic summary properties, most of which you can edit. As well as

the **Properties** pane, you can view and add properties to the **Document panel**, which is displayed on the screen under the ribbon.

## Try This Yourself:

Open File

Before starting this exercise you **MUST** open the file **W1360 Properties\_1.docx...**

- 1 Click on the **FILE** tab and ensure that **Info** is selected

The **Properties** pane will appear on the right side of the screen, displaying common properties. Let's view more properties...

- 2 Click on **Show All Properties** under **Related Documents** in the bottom right of the screen to expand the list of properties

The pane will expand to display all editable document properties. Let's now view the **Document panel**...

- 3 Click on **[Properties]** and select **Show Document Panel** to display the **Document panel** – leave it open for the next exercise

The **Document panel** will only display properties that you can edit

## For Your Reference...

To **view document properties**:

1. Click on the **FILE** tab and select **Info**
2. Click on **Show All Properties** to view all summary properties, or  
Click on **[Properties]** and select **Show Document Panel**

## Handy to Know...

- The **Properties** pane displays all editable properties, while the **Document panel** displays common, editable properties.
- Click on **Open File Location** in the **Properties** pane to open **Windows Explorer** and display the folder where the document is saved.

# SPECIFYING DOCUMENT PROPERTIES

You can add data to your document properties at any time. Specifying **document properties** such as keywords or tags, can help you or others to search for and identify the file in future. You can

add data to your document's properties in the **Properties** pane or in the **Document panel**. Some information is added by Word, but you can add and edit data according to your needs.

## Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file W1360 Properties\_2.docx...

- 1 Ensure the **Document Panel** is displayed, then click in **Title** and type **Staff Induction Information**
- 2 Press **Tab** to move to **Subject** and type **Staff Induction**
- 3 Repeat step 2 to add the rest of the data as shown  
*Let's update the Author property in the Properties panel...*
- 4 Click on **Close** to close the **Document panel**, then click on the **FILE** tab and select **Info**  
*Blank property fields contain text describing the data to enter...*
- 5 Right-click on the value in **Author** and select **Remove Person**  
*The field will now have no data...*
- 6 Click on **Add an author** and type your name
- 7 Click on the **Back** arrow to return to the document

Document Properties Location: C:\ERProfile\Microsoft Word 2013\Ex

Author: Cara Hemphill Title: Staff Induction Information Subject: Keywords:

Category: Status:

Comments:

1

3

<b>Keywords</b>	Induction, new staff, hazards, telephone faults, ergonomics, passwords
<b>Category</b>	HR
<b>Status</b>	Draft
<b>Comments</b>	Text to include in the Staff Induction Information Packs

Related Dates

Last Modified Today, 9:21 AM

Created Today, 9:21 AM

Last Printed

Related People

Author

Cara Hemphill

Add an author

Last Modified By

Cara Hemphill

Related Documents

Open File Location

Show All Properties

Remove Person

5

## For Your Reference...

To **specify document properties**:

1. Click on the **FILE** tab and select **Info**, then click on **View All Properties**, click in a field and type the required data, or  
Click on the **FILE** tab and select **Info**, click on **[Properties]** and select **Show Document Panel** and add the required data

## Handy to Know...

- When you create a new document, the **Author** field displays the **User name** specified in **Word Options**. To update the default user name, click on the **FILE** tab and select **Options**. In the **General** options, select the text for **User name** and type your name. Click on **[OK]**.

# INSERTING PROPERTIES INTO A DOCUMENT

One of the advantages of maintaining document properties is that you can insert property data into a document, such as the author or company name. This is done by inserting **content controls**

that hold the data into the document. Not only is this a quick method of inserting standard information into a document, but it will also update automatically when the property data changes.

## Try This Yourself:

Open  
File

Before starting this exercise you **MUST** open the file *W1360 Properties\_4.docx...*

- 1 Click at the end of the first heading and press **Enter** to create a new line
- 2 Type **Prepared by:** and press **Space**
- 3 Click on the **INSERT** tab, click on **Quick Parts** in the **Text** group, select **Document Property**, then select **Author**  
*The author's name will appear in the Author content control...*
- 4 Press **End** and press **Space**, then type **for** and press **Space**
- 5 On the **INSERT** tab, click on **Quick Parts** in the **Text** group and select **Document Property**, then select **Company**  
*The company name content placeholder will appear*

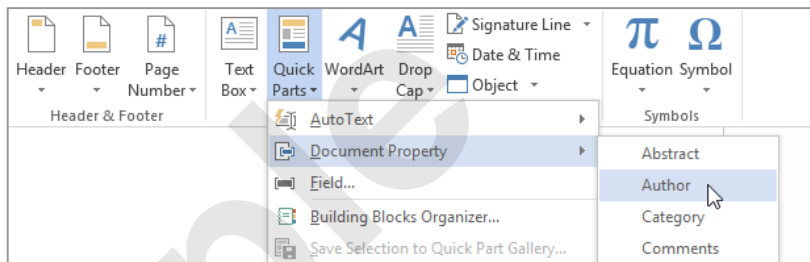
### Staff Induction Information

Prepared by: |

Please create individual Staff Induction Information Packs including only the paragraphs that are relevant to the positions.

### Incident and Hazard Reporting

2



3

### Staff Induction Information

Prepared by: Janice Ian for |

Please create individual Staff Induction Information Packs including only the paragraphs that are relevant to the positions.

### Incident and Hazard Reporting

4

### Staff Induction Information

Prepared by: Janice Ian for [Company]

Please create individual Staff Induction Information Packs including only the paragraphs that are relevant to the positions.

### Incident and Hazard Reporting

5

## For Your Reference...

To **insert property data** into a **document**:

1. Click where you want to insert the content control
2. Click on the **INSERT** tab, then click on **Quick Parts** and select **Document Property**
3. Select a property field name

## Handy to Know...

- If the property field that you want to insert does not appear in the **Document Property** list, select **Field** instead. This displays the **Field** dialog box and gives you access to a full list of content controls that you can insert.

# PRACTICE 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:**

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# PRACTICE EXERCISE WORKSPACE

## Document Standards

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- 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.

Sample