

Chapter 9: Producing Documents in Final Format

Overview

The first impression a document makes is based on its appearance; therefore, it is important to pay attention to formatting details. This chapter presents information on formatting a variety of types of documents, and there are many figures to display as examples. While students should pay close attention to the information offered here, they may find small differences in the way documents are formatted in their own work place.

Lecture Notes

A. Business Letters

A properly formatted letter with well-placed copy will be positively received.

1. **Format of Business Letter** relates to the placement of the letter on the page. Refer students to figure 9-1 for placement of key parts based on the length of the letter. Other parts should be placed in this order.
 - a. Date line should include the month (spelled out), then the date followed by a comma, and then the year.
 - b. Inside address includes the name and address to which the letter will be sent. A title should precede the individual's name; the two-letter state abbreviation and ZIP+4 code should be used.
 - c. Attention line is optional; it can be used when the letter is addressed to a company. It is keyed a double-space after the inside address or as the second line of the inside address.
 - d. Salutation is a greeting to the receiver; it begins with Dear and then the person's name (formal letters use a title and last name; informal letters use first name only). If a letter is addressed to an organization, use the salutation *Ladies and Gentlemen* (no Dear) (or *Dear Sir or Madam* or *Dear* title within a department). The salutation is keyed a double-space after the previous notation.
 - e. Subject line is optional; it is a descriptive phrase telling what the letter is about. It may include the word SUBJECT:, but it may not. It appears a double-space after the salutation.
 - f. Body of the letter is the detailed information in paragraph form. The paragraphs should be single-spaced with double-spacing between them. Each letter should have at least two paragraphs, but three is most common.
 - g. Complimentary closing is keyed a double-space below the last line of the body of the letter; only the first letter of the first word is capitalized. *Review the list of common choices on p. 275.*
 - h. Signature line is the typed name of the person sending the letter; it is keyed four Enters below the complimentary closing to allow space for the person to sign their name. Visual balance should be maintained when deciding whether to type the title on a separate line from the signature line.

- i. Reference initials include the initials of the administrative assistant that prepared the letter and may be those of the writer. The initials are keyed a double-space below the signature line.
 - j. Enclosure notation is keyed if materials are enclosed with the letter; it is keyed a double-space below the reference initials. *Review the format options on p. 276.*
 - k. Copy notation is used when a copy of the letter is being sent to one or more persons; it is keyed a double-space below the reference initials at the left margin. If there is also an enclosure notation, the copy notation comes before the enclosure notation if the person receiving the copy is NOT getting the enclosure. If the copies of the enclosure are also being sent to those getting copies, the copy notation comes after the enclosure notation. *Repeat this to be sure everyone is clear. Additional guidelines are presented on p. 276.*
 - l. Blind copy notation is used only on copies of the letter, when the recipient of the letter need not be aware of the copy(ies) being sent. The notation appears a double-space below the last notation on the copies.
 - m. Line spacing within the paragraphs of the letter are single-spaced with a double-space between them. Spacing between the date line and inside address depends on the length of the letter. Minimum spacing between the closing and signature line is four Enters.
 - n. Special notations can vary. CONFIDENTIAL, PERSONAL, CERTIFIED, REGISTERED, and SPECIAL DELIVERY are keyed a double-space below the date line at the left margin in all capital letters. A fax notation could be handled the same way if a letter was faxed.
2. **Letter Styles** are pictured in figures 9-2, 9-3, and 9-4 beginning on p. 278.
- a. Block letter style displays all lines beginning at the left margin; it is considered an efficient style.
 - b. Modified block letter style moves the date on complimentary closing/signature lines to the center; the paragraphs may be indented 1/2-inch or begin at the left margin.
 - c. Simplified letter is considered the most efficient letter style; it omits the salutation and complimentary closing. The letter begins with a subject line and ends with the signature line in all caps.
3. **Punctuation Styles** relate to the punctuation after the salutation and complimentary closing.
- a. Open punctuation style does not use any punctuation after the salutation or complimentary closing. *It is displayed in figures 9-2 and 9-4.*
 - b. Mixed punctuation uses a colon (:) after the salutation and a comma (,) after the complimentary closing. *It is displayed in figure 9-3.*
4. **Second Page of Letter** is printed on plain paper to accompany the letterhead on page one; a heading is used to keep the pages in order. The heading varies on the different letter styles.
- a. Block letter style begins the heading either 1/2-inch or 1-inch from the top of the page. The single-spaced heading displays the person's name, page

number, and date at the left margin; there are three Enters before returning to the body of the letter. This same style is used on a simplified letter.

- b. Modified block letter places the heading the same distance from the top of the page; however, the information is spaced across the line(s). The person's name appears at the left margin, the date in the center, and the page number at the right. If the department name is used, it appears directly under the person's name. Again, there are three Enters before returning to the body of the letter.
- c. Word processing headings allow the information to be keyed once and then automatically placed on each page.

B. Envelopes

Envelope size and addressing style should be selected for each mailing. *Specific information can be referenced from the U.S. Postal Service at www.usps.gov.*

1. **Conventional Style** of printing on an envelope is different for a #10 and # 6 3/4.
 - a. A #10 envelope is addressed using a 4-inch left margin and 2.25-inches from the top edge, #6 3/4 uses a 2-inch left and top margin. Use block style, single-spaced address with all words in capital letters and no punctuation. Use the 2-letter state abbreviation and ZIP+4 code.
 - b. Special mailing notations should be used where applicable. *Personal, Confidential, or Please Forward* should be keyed below the return address on the third line. Mailing notations like *Registered, Special Delivery, or Certified Mail* should be keyed in all capital letters in the upper-right corner of the envelope, just below the stamp.
2. **OCR Requirements** allow equipment to process the mail.
 - a. The OCR-read area boundary should not be used for the address. *Review the measurements shown in figures 9-8 and 9-9.*
 - b. Prepare the address following the USPS guidelines, including suggestions for window envelopes and international addresses.
 - c. Type for OCR reading should be standard fonts; avoid script and artistic fonts because they cannot be read by the equipment. The font size shouldn't be any smaller than 10 point.
 - d. Spacing must be within a specific range for readability with equipment. Typical vertical spacing can be used, space between words should be one or two spaces, one to five spaces can be between the two-character state abbreviation and ZIP+4.
3. **Computer-Generated Mailing Labels** offer an alternative to envelopes; they are easily printed using word processing software. Be sure to understand label sheet placement in your printer before using them.
 - a. Creating address files in a database format allows for customized labels.
 - b. Word processing software with a mail-merge feature can print labels to go along with merged letters or using the data file from a mail merge.

C. Memoranda

This is an internal form of communication used between individuals or departments in a company; it is usually printed on a memo form with a heading.

1. Format of a Memorandum

- a. Top margin is 1-2 inches; the most common is 1 1/2 inches. The heading is centered in all caps (or initial caps and bold or underline).
- b. Side margins will vary with the length of the memo; a long memo will have narrow margins and longer lines of print (1-inch margins), whereas a short memo will have 2-inch margins and shorter lines of print.
- c. Guide words should be double-spaced and begin a double-space below the heading, but the arrangement is up to the writer (or company standard).
- d. Body paragraphs are a double- or triple-space after guide words, then single-space the body with a double-space between paragraphs.
- e. Reference initials are keyed a double-space below the body of the memo.

2. **Using Word Processing Templates** allows the administrative assistant to key in the variable information and the message; the heading, guide words, date, and formatting are all part of the template.

D. Electronic Mail

1. **Preliminary Sections** of e-mail format come before the message.

- a. The FROM address is the sender's email address; it is automatically sent.
- b. The TO address is the receiver's address (or receivers'); it is keyed in the format name@domainname.ext. If you are sending to multiple people, use the correct punctuation between addresses. *This varies depending on the ISP or software.*
- c. Copies sent to others by putting their email address(es) in the Copy section of the e-mail window.
- d. Blind copies sent to others without original recipient's knowledge must be listed as blind copies.
- e. Date and time of the message is automatically recorded and sent with the message.
- f. Subject of the message tells the recipient what the e-mail is about. *Remind students to use a descriptive message so the reader knows what it is about; leaving the subject blank may leave the email unread for security purposes.*

2. **The Message Format** makes an e-mail easy to read. It should be keyed in single-spaced paragraphs with a double-space between the paragraphs; be sure to separate ideas into paragraphs.

- a. Salutation is a greeting to begin the message, formal or informal.
- b. Message is keyed block style for readability or in lists.
- c. Complimentary closing can be followed by a comma.

- d. Signature file can be prepared and stored to be affixed to all e-mails. It should include the sender's name, title, company name, e-mail address, telephone number and fax number.

3. **Attachments** can be added to copy files and sent along with the e-mail. *The attachment process may vary with different ISPs or software.*

E. Business Reports

1. **Physical Layout** of a report is as follows.

- a. The top margin is 1/2–1 inch larger on the first page than on subsequent pages. The left-margin decision depend on binding choice; it is 1 inch on an unbound report and 1 1/2 inches on a left-bound report.
- b. Title is keyed in all caps and centered on the first page, unless the report includes a title page.
- c. Line spacing should be uniform, usually double-spaced if the report is more than a page. If a report is double-spaced, then a 1/2-inch indentation for the first line of each paragraph is used for readability.
- d. Headings are used to note sections and subtopics in a report. Levels should be predetermined; all headings of the same level should be formatted the same.
- e. Page numbers are used for organization; they are usually placed at the right margin. Styles of numbering can vary.
- f. Automatic generation of supplements like table of contents, table of figures, footnotes/endnotes, and indexes can be done with word processing software.
- g. Widow/orphan lines should be avoided, but that can be done in the word processing software.

2. **Documentation** gives appropriate credit to information sources.

- a. Copyright protection is given to original works by the Copyright Protection Act of 1976 (and amendments).
- b. Documentation styles include APA, MLA, and CMS; often an organization has a preferred style for all of its documents. Using ideas of others without citing the source is plagiarism.
- c. Types of reference notes (citations) can be direct quotes or paraphrasing of the original author's ideas and words. References are cited in-text, or as footnotes or endnotes. *Review the example citations in figure 9-13 (p. 304) to familiarize students with the various methods. There are also various styles shown in the text.*
- d. A bibliography lists all references consulted for the report; it is placed at the end of the report on a separate page. The format of the bibliography can vary with the various documentation styles.

F. Other Forms of Business Communication

These are only the most common documents that an administrative assistant may be involved with. Students should look at this as an overview of types of communication.

1. **Minutes** summarize the events taking place during a meeting; they become the official report of the meeting.

- a. Heading begins 1 1/2–2 inches from the top edge of the paper, centered or arranged. It includes the name of the group, date, time, location, and type of meeting.
- b. Attendance at the meeting is next, in an alphabetical list; special guests and those absent from the meeting should also be listed.
- c. Body is a summary that follows the agenda in paragraph form.
- d. Motions are listed along with those making and seconding them.
- e. Closing includes “Respectfully submitted” and the secretary’s signature line.

2. **News Release** is an announcement about a business event usually prepared by the administrative assistant.

- a. Heading is NEWS RELEASE, release date, and contact information. After the heading, there should be a break indicated by underscores (____) or asterisks (***) across an entire line.
- b. Body includes a title and news written using the direct approach, clear and concise.
- c. Closing symbols indicate the end of the release; they are centered in a line (###).
- d. Spacing the news release to fit on one page is a good idea; therefore, margins will vary. *Review the guidelines and samples on p. 314.*

3. **Itinerary** is a travel plan including all of the details of the trip; copies should be available for anyone who needs the information.

- a. The types of information and details include:
 - Departure date, time, and place
 - Transportation type
 - Arrival date, time, and place
 - Lodging information
 - Appointments and meetings
 - Return trip information
- b. Parts of the itinerary include:
 - Heading includes name and dates of trip
 - Dates and times
 - Travel and meeting information
 - Formatted so it is an easy-to-understand reference

4. **Outlines** consist of key words coded in descending order of importance/detail. *An example is found on p. 318.*

- a. Coding the outline is done in a standard format in the following levels:
 - Roman numerals (I, II)
 - Capital letters (A, B)
 - Arabic numbers (1, 2)
 - Lowercase letters (a, b)
 - Numbers in parentheses (1), (2)

- Lowercase letters in parentheses (a), (b)
- b. Spacing an outline should consider readability from the reader's viewpoint and be consistent throughout the outline. If phrases are mainly two or more lines long, double-space between all points; if key words are short, it can be single-spaced.

5. **Abstract and Précis** are both forms of summaries of the key points in an article or reference. All relevant information and major conclusions must be included and the original must be documented. *Examples are found on pp. 321-323.*

- a. Concise summary of key points is the key to both documents. An abstract is 1/4–1/2 the length of the original, while a précis is 1/3 of the original and recomposed text without illustrations.
- b. Relevant information may be presented using facts, listings, headings, and topic sentences.
- c. Reporting major conclusions can be done by reading the concluding summary first and including these points.
- d. Complete documentation, including accurate bibliographic information.
- e. Level of language should be consistent with original document to maintain the tone and thought of the author.
- f. Outline and paragraph formats are acceptable for abstracts; a précis is usually written in paragraph form.
- g. Distinguish abstracts from précis with proper identification on document.
- h. Using abstract or précis while giving credit to the original author is important; if credit is not given, it is plagiarism.

Additional Resources for Students

Recommended readings (no texts should be more than two years old):

- Boone, Louis E. and David L. Kurtz. *Contemporary Business Communication*. Prentice-Hall, Inc.
- Bovee, Courtland L. and John V. Thill. *Business Communication Today*. McGraw-Hill, Inc.
- Guffey, Mary Ellen. *Business and Administrations Communication*. South-Western Publishing Co.
- Himstreet, William C. and Wayne M. Baty. *Business Communication*. Kent Publishing Co.
- Lesikar, Raymond V. *Basic Business Communication*.
- Ober, Poland, Rosetti, Hanson, and Johnson. *Gregg College Document Processing*. Glencoe.
- Ober, Scott. *Contemporary Business Communication*.
- Wolf, P. and S. Kuiper. *Effective Communication in Business*.

Current issues of periodicals or business publications are also an excellent resource. Some of the following periodicals have an accompanying Web site.

<i>Current Periodical</i>	<i>Web Address</i>
<i>Gregg Reference Manual</i>	
<i>IAAP Complete Office Handbook</i>	http://www.iaap-hq.org/products/handbook.htm
<i>Modern Office Technology</i>	
<i>OfficePro</i>	http://www.iaap-hq.org/officepro/toc.htm
<i>The Office</i>	
<i>United States Postal Service Web site</i>	http://www.usps.gov