

Unit 225
**Principles of business document production and information
management**

PRODUCING DOCUMENTS



TYPES OF DOCUMENT

- letters
- memos/emails
- faxes
- reports
- minutes/agendas
- newsletters
- flyers/posters
- forms and invoices.



LETTERS

- clearly structured and well presented – reflect image of organisation
- standard conventions exist
- must be accurate
- house styles may be required.



EXAMPLE LETTER

ABC Supplies

70 Regent Street, Hitchin, Herts
01462 939399

Reference RD/FRT

14 November 2000

Mr E F Taylor
Sales Manager
Thomkins & Greenaway & Co Ltd
Greenacre Industrial Estate
PETERBOROUGH
PE4 9XR

Dear Mr Taylor

Thank you for your letter of last week.

As advised to you earlier, we have been hampered by the recent postal strikes. Please be assured that you will be informed just as soon as the items are available for collection.

I hope to be in touch with you again by the end of next week.

Yours sincerely

John Williams

Very often initials of dictator/typist or a file number, etc. forms the reference.

This is the **salutation**. Use Dear Sirs when writing to a firm, or Dear Sir when writing to an unknown person. The complimentary close will change to Yours faithfully.

This is **the complimentary close**. A much larger space is needed after this so that Mr Williams can sign his name. Normally the typist presses Enter 5 or 6 times.

MEMOS

Internal documents which are sent to one or more members of staff.

Some staff are direct recipients while some are copied in.

Short memos have been replaced by email.

Government departments use memos for formal inter-departmental correspondence.



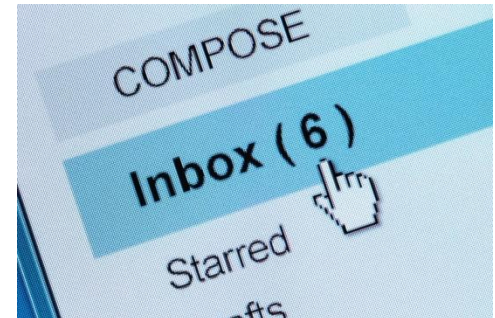
EMAIL

Your organisations may also have a house style for email.

Check the person you are sending the email to is the correct person.

Never use capital letters throughout the email as this is seen as being aggressive and is almost like SCREAMING at the recipient.

Always put the subject or topic in the subject box.



REPORTS

- researched information
- clear structure – introduction, main body, summary
- main body contains the findings supported by the evidence
- summary of recommendation
- references and sources of information.



REPORT STRUCTURE

Title page	The title of the report with the name of the person who wrote it and the date.
Contents page	Not necessary if the report is short; useful to list the paragraph headings and the pages on which they appear if report is long.
Terms of Reference	Gives the background to the report – why it was written and what it is about, eg <i>To report on filing equipment as requested by S Jones, Manager on (date).</i>
Procedures	Explanation of the steps taken to gather the information.
Findings	Make sure your report progresses logically from one point to the next, with headings for each section.
Conclusion	Sum up the findings of the report.
Recommendation	On the basis of the information in Findings and Conclusions, make recommendations for action (or perhaps for no action).



REPORT LAYOUT

Include Company name and a clear title	THE EXCELSIOR HOTEL		
	REPORT ON VISITOR SATISFACTION		
State why you are writing the report and who asked you for it (Terms of Reference). Also list the steps taken to gather the information (Procedures)	INTRODUCTION		

<p>These are the Findings. Use sub-headings to classify the information logically.</p> <p>Use numbered points consistently.</p> <p>Remember to state only the facts.</p>	1	STANDARD OF SERVICE	
		1.1	_____
		1.2	_____
	2	FACILITIES	
		2.1	_____
		2.2	_____
	3	RESTAURANTS	
		3.1	_____
		3.2	_____
	State the logical implications of the Findings.	CONCLUSIONS	

Make recommendations (if requested).	RECOMMENDATIONS		
	1	_____	
	2	_____	
Don't forget to add this closing section.	Name		
	Title		
	Reference		
	Date		



AGENDA AND MINUTES

Formal meetings require an agenda and minutes.

A formal meeting with an agenda will be recorded in minutes.

Minutes outline what was discussed and act as a record of the meeting.

They record action points relating to work to be carried out.



FORMS

Tables can be used in word processing to make effective forms.

Most word processing software has the facility to add check boxes and drop-down boxes for completing online.

INVOICE		
To:	Date:	Invoice No:
Description	Cost £	



HOUSE STYLE FACTORS

- font style and colour
- size of font
- style and position of headings
- spacing
- justification of the text
- size of the margins
 - position of date, references and addressee's details on letters.



TEMPLATES

Many of the standard documents an organisation uses will be held as templates.

A blank copy of the document which is saved for future use over and over again.

Organisations use templates because

- documents are produced according to the house style
- it saves time.



FIT FOR PURPOSE

Ensuring that any document

- is readable in terms of the language used
- is accurate in detail
- is easy of use in terms of its layout
- has the impact required in terms of formality and message
- maintains or enhances the organisation's reputation.



ACCURACY

Carefully check all documents for sense and accuracy before sending them.

Use the spell and grammar check on your word processor, but beware also of homophones where mistakes can often occur – their/there; site/sight; to/too/two; etc.

Watch out for keying errors like out/our or form/from.

No spell checker will identify homophonic or keying errors.

The secret lies in careful proofreading.



VERSION CONTROL

Where documents undergo edits and revisions, it is sensible to use a version control system from the beginning.

Document should be given a name and number, eg Report V1.docx.

Revisions to the document should be saved with the number incremented, eg Report V1.docx.

Date and version number should appear on the first page and, when possible, is incorporated into the header or footer of the document.

A table should list the dates and version numbers and the changes made.

