



Software Educational Resources Ltd

Layout and Business Documents

For more comprehensive information on layout and design of business documents please contact us for a copy of "Formats and Layouts for Business" which is an informative reference book for anyone involved in creating business documents. It includes correspondence, meeting, promotional and employment documents, forms, website design etc.

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Layout of Business Documents

The following pages include layout of business documents and samples of the following documents:

- Advertisements
- Business letter
- Minutes of Meeting
- Memorandum
- Fax Form
- Email document

Layout Concepts

The following information is provided to assist you in the layout of documents. Read this information and look at the formatting that has been applied. If you are familiar with the features used in Microsoft Word you may wish to type this document.

Typography

Heading 2 - Subheading
Arial, 14pt bold, 12pt Spacing Before

Normal text (ie Body text)
Times New Roman 12pt,
9pt Spacing Before

Typography is the design of the characters that make up text and display type (headings, subheadings, body text, etc) and the way they are configured on the page - influences the appearance of your document more than any other single visual element.

The typeface you select can assist, or hinder, the readability of your document. Type can add personality and expressiveness to your document.

9pt spacing

Some typefaces are formal:

The Grand Hotel

6pt spacing

and others are informal;

Mr and Mrs R J Brown cordially invite

some are interesting;

MID-WINTER CHRISTMAS DINNER

some are serious.

This is a good reading font.

9pt Spacing

There are two categories of type - **serif** and **sans serif**.

Serif type has “curly” parts at the top and bottom of characters: This is serif type

Sans serif type is plain and ideal for headings and subheadings: This is sans serif type

Do not mix too many typefaces in a document - usually only two in commercial documents. (You can be more creative in advertisements or graphic publications).

Consistency

The golden rule in the layout of any document is consistency, eg

9pt Spacing

- same font and font size for the same heading level, eg Arial 14pt, bold for subheadings.

6pt Spacing

- punctuation style
- use of capitals
- paragraph styles
- spacing
- paragraph numbering/bullet styles
- alignment
- margins and white space

9pt Spacing

Sometimes spacing before and after headings is adjusted slightly if text is required to fit on a page. This does not usually detract from the appearance of the document. (You can use the Before and After options on the [Format] Paragraph menu to adjust spacing).

Major Headings

Use a font and font size for a major heading so it will inform the reader of the focus of the page/document. Headings should be large enough for easy reading and can be centred, left aligned, or right aligned. There is usually only one major heading but sometimes there is a major sub-heading also (which should be in a smaller font size).

Subheadings

Heading 3
12pt Spacing Before,
Arial 13pt, bold

Subheadings are a transition from the major heading to body text

Subheadings lead readers from the major heading into the body text and make it easy for readers to locate information. Subheadings are usually in bold and in a smaller font size than the major heading(s).

Lists

Numbered and bulleted lists can have less spacing between items and more above and below the list.

Borders and Lines

Borders and lines can be added to documents - again spacing must be consistent - if you insert 12pt (or one Enter) before one line then the next line must have the same amount of spacing used.

Spacing

Variations can occur, eg the spacing between the bulleted list on the previous page could be reduced to 3 or 4pt if it was necessary to fit text on a page. Spacing after subheadings could be 6pt etc.

Punctuation and Capitalisation

It is important the punctuation used is consistent throughout. Look at the font size measurement on these two pages. This is typed as 12pt (no space between 12 and pt). This is acceptable because it is consistent and if a document is justified this format prevents additional spacing being added between the 12 and pt - a hard space could of course be used!

Notice that we have used a comma before *ie* and *eg* and no fullstop after.

Notice that each word in the subheading is capitalised (small words such as *and* would be in lower case), and that the third level headings have only the first word capitalised.

Paragraphs and Alignment

This document has block style paragraphs throughout and justified alignment (ie left and right margins are even, not ragged).

Margins and White Space

Margins are the same, a wider left margin is acceptable on single sided documents and inside margins can be wider on double sided documents. Use of white space makes the document easier to read.

Exercise

The formatting of the document below is inconsistent. Write a list of things you would change and then type this document.

.....

.....

.....

.....

.....

Other layout concepts

Experimentation

Be willing to experiment

Design excellence is often the result of trial and error and professional graphic designers rarely solve design problems on their first attempt. Often they spend a considerable amount of time sketching out solutions that might work.

Word processing programs permit you to follow this same procedure - you can save your attempts with different filenames until you arrive at the ideal layout or use the Undo key.

Appropriateness

Be flexible in applying the rules that follow

Success in graphic communications is based on appropriately relating the elements of graphic design to their surroundings. Appropriateness is based on proportion. The size of any graphic element should be based on the size of the page, the graphic elements that surround it, and the emphasis you want it to receive.

Appropriateness also relates to the content of the publication and the people who will be reading it, eg an advertisement for a clothing sale would have a totally different appearance than a company report.

BALANCE

Avoid Static Balance

Balance can lead to boredom and interrupted eye movement. Unequal left/right or top/bottom balance helps provide movement and create interest to the reader.

Proofreading

Check for text and layout mistakes

Use the spell check facility if available. Get someone else to review it. As well as proofreading text, check for graphic consistency, eg. ensure that line elements are even, headings are in the correct font size etc.

Advertisements

A good advertisement is eye-catching and easy to read. Advertisements can be enhanced by the use and variation of:

centred and block headings
different sized fonts
bold, italics, enhancements
tabs and indents
underscoring (minimal - variation of fonts is more acceptable)
lines, borders, graphics

and most of all - WHITE SPACE.

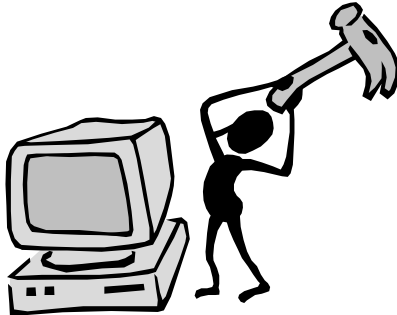
Note: Often the main emphasis of the advertisement is in the largest font size.

SOFTWARE EDUCATIONAL RESOURCES LTD

for

Computer Training Manuals

Written in plain English



Ideal for the frustrated PC user

A complete, easy to follow course
Hands on instruction
Includes disk with exercise files

PO Box 302 105, North Harbour Post Centre
3a Te Kea Place, North Harbour Industrial Park, Auckland
Ph (09) 415 5666 Fax (09) 415 5667 E-mail: cprice@softeduc.co.nz

Business Letter



North Shore Training Centre Ltd

36 Ridge Street, North Sydney 2060
PO Box 198, North Sydney Post Centre 2059

Phone: 9302 4402 Fax: 9302 5402 Email: training@nstc.com.au

REF: RJB001.LTR *(Press Enter three times)*

1 February 2000 *(Press Enter three times)*

The Manager
Trade Services Australia Pty Ltd
PO Box 2582
ST LEONARDS 2065 *(Press Enter three times)*

ATTENTION: Mr James Johnson *(Press Enter three times)*) *(or press Enter three times*
) *if no attention line)*
)
)

Dear Sir *(Press Enter twice)*)

WORD 97 TRAINING *(Press Enter twice)*

Thank you for your enquiry regarding Word 97 training for your staff and for yourself.
(Press Enter twice)

As requested, I am enclosing information on training courses and prices. We offer specialised training for companies whereby courses can be "customised" to your requirements using your own documents for exercises if you desire. *(Press Enter twice)*

Please contact me if I can be of further assistance. *(Press Enter three times)*

Yours sincerely *(Press Enter 4-6 times)*

Sheila Marks
Training Manager *(Press Enter twice)*

Enc

Minutes of Meetings

The full block style of Minutes of Meetings is shown below.

Minutes should include the following information:

The type of meeting, place, date and time.

Name of the Chairperson and names of persons present (Chairperson first, then in alphabetical order)

Apologies

Confirmation of Minutes of the previous meeting

Matters arising from the Minutes of the previous meeting (if any)

Other matters such as reports, correspondence, business discussion

The time the meeting was closed

Space for the Chairperson to sign and date completed during the next meeting.

MINUTES OF THE EIGHTH ANNUAL GENERAL MEETING OF THE NORTH SYDNEY SQUASH CLUB HELD AT THE CLUB ROOMS, MCLAREN STREET, NORTH SYDNEY, ON WEDNESDAY, 14 FEBRUARY 2000 AT 7.30 PM

PRESENT

Cameron Strong (Chairperson)
Diane Crookes
Harold Dentener
Barbara Barry (Secretary)

APOLOGIES

Apologies were received from Carol Burnett.

MINUTES

Minutes of the seventh Annual General Meeting were read, approved and signed as a true and correct record.

ELECTION OF OFFICERS

It was resolved that the present officers be re-elected for a further season. Moved by Harold Dentener, seconded by Diane Crookes.

SUBSCRIPTIONS

It was resolved that subscriptions be increased by 10 percent for the new season. Moved by Ann Bell, seconded by Harold Dentener.

TOURNAMENT ENTRIES

It was agreed that tournament entries are very high and it was suggested that Cameron Strong raise this point at the next regional meeting.

The meeting concluded at 8.30 pm.

Chairperson:

Date:

Memoranda

Memos can be typed in on A5 or A4 paper. A basic memo is shown below. Field codes can be inserted (by pressing Ctrl F9) to enter variable information.

A memo must show certain information -

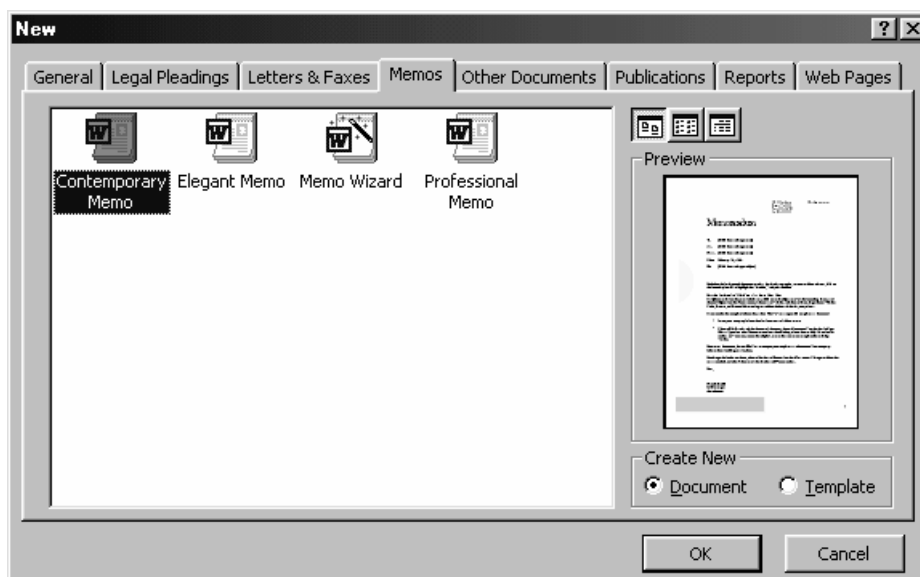
- Who the memo is to
- Who the memo is from
- The date of the memo
- The subject of the memo
- Reference (optional)
- The message

Memorandum

TO: Managing Director
FROM: Accountant
DATE: 14 March 2000
SUBJECT: Salary Reviews

Further to our telephone conversation I have attached a schedule of recommended salary increases for office staff to take effect as from 1 April this year.

Word has various styles of memos to select from. The following are available by choosing [File] New and clicking on the Memos tab. Variable information can be filled in by clicking in the [Click here and type name] box.



Fax Forms

A fax form is used to send information to another department, branch or company through a facsimile machine. Field codes can be inserted (by pressing Ctrl F9) to enter variable information. A "cover" sheet is the first sheet of the fax and contains the following information:

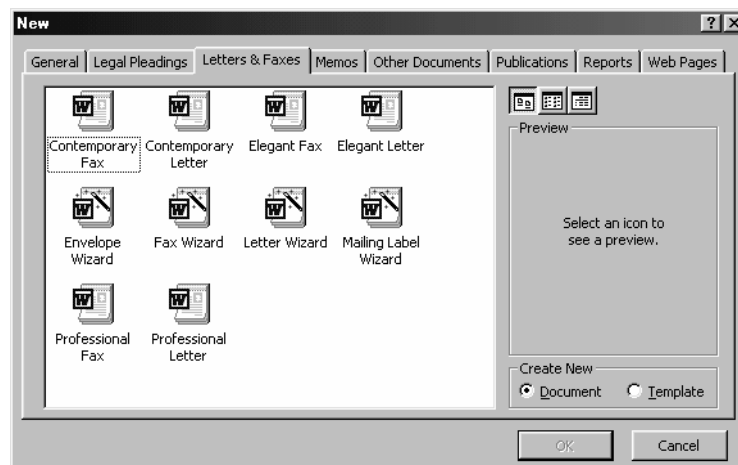
- Who the fax is to - name of person and company
- Who the fax is from
- The fax number you are sending the fax to
- The date of the fax
- Your fax number (this is often printed at the top of the sheet)
- The number of pages, including the cover so the receiver knows how many pages have been sent.

The following is an example of a simple fax form.

Facsimile	
TO:	Office Manager
COMPANY:	Robert Yates & Co Ltd
FAX:	378 9056
FROM:	Julia Donaldson
DATE:	12 May 2000
SUBJECT:	Installation of Software
NO. OF PAGES (incl. cover)	1

Further to the purchase of your computer equipment yesterday, I wish to confirm that I will be at your office at 9 am tomorrow to install your Office 2000 program.

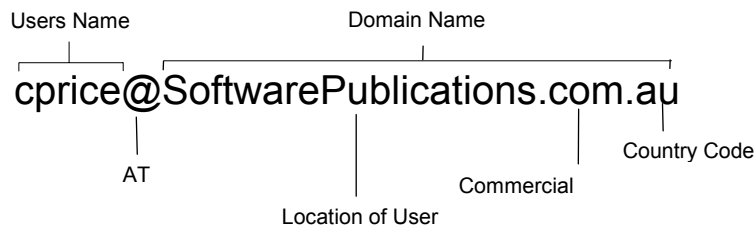
Word has various styles of faxes to select from. The following are available by choosing [File] New and clicking on the Letters & Faxes tab. Variable information can be filled in by clicking in the [Click here and type name] box.



Email

Email is used extensively for personal communication, from within an office from one person to another, from office to office within the same country, and overseas. The most used email programs are Outlook Express and Microsoft Office Outlook. The general principles for sending email are the same.

- 1 Enter your email package.
- 2 Click on the New Mail button which will display the New Message window:
- 3 Click in the To: box and type the name of the person you are sending the email to. An example of an email address is shown below. Ensure that you have keyed in the address **exactly**:

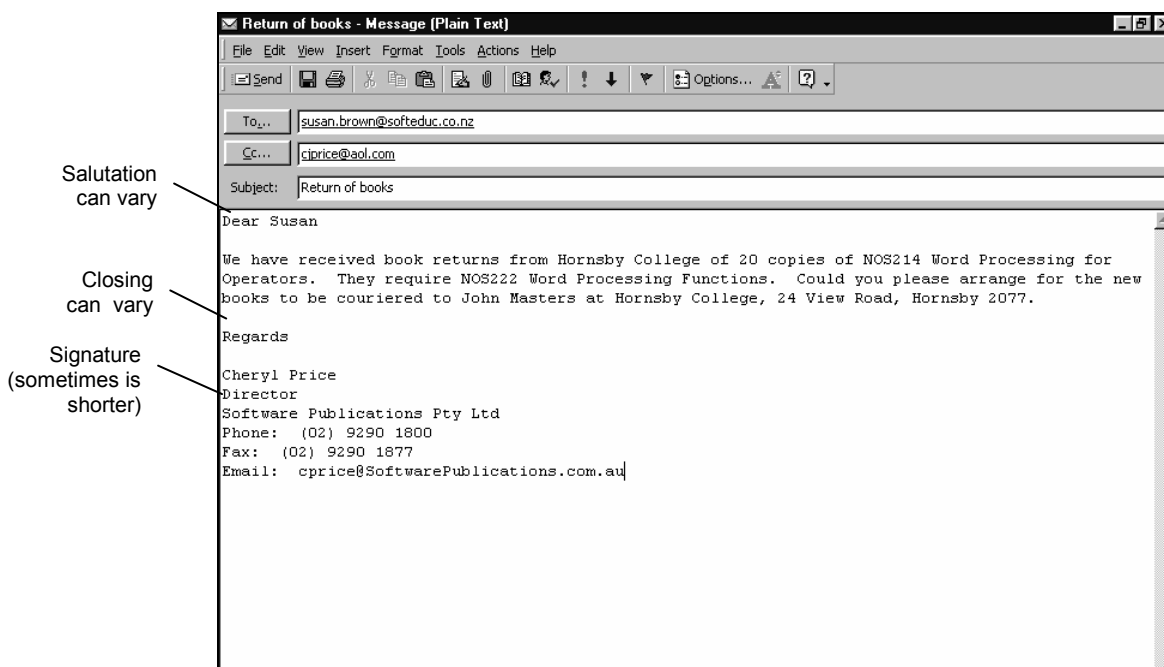


Email addresses that you use frequently can be added to an Address book (sometimes referred to as Contacts). You can type in several email addresses separated by a semi-colon (no space) in the To and/or cc boxes as shown below:

cprice@SoftwarePublications.com.au;jhall@techpac.co.nz;ahall@hotmail.com

A signature file can be set up at the bottom of your email address so it appears automatically every time you send an email message. Files can be attached by choosing [Insert] File (or clicking on the relevant button). To open an attached file, double click on the icon displayed.

- 4 Click on the Send button to send the email message.



(For practice, send email messages to susan.brown@softeduc.co.nz - you will receive a reply).