

Formatting BUSINESS DOCUMENTS

Practice Lessons for Word Processing Applications



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Formatting **BUSINESS DOCUMENTS**

Practice Lessons for Word Processing Applications

Student Workbook

1st Edition



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PUBLISHED BY



B.E. Publishing

Formatting Business Documents Student Workbook

ISBN: 1-934422-50-9

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Author

Joy Tavano

Editors

Kathleen Hicks

Diane Silvia

Linda Viveiros

Design

Fernando Botelho

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B.E. Publishing, Inc.

P.O. Box 8558

Warwick, RI 02888

U.S.A.

Tel: 888.781.6921

Fax: 401.781.7608

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Printed in the U.S.A.

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Introduction

Welcome to *Formatting Business Documents*

One of the most important and essential tools a person needs to succeed in the business world is effective and professional communication skills. When communicating by writing, it is imperative that not only proper grammar and punctuation are followed, but also that the document being used is formatted properly. This book will teach students the principles and proper formatting guidelines on 16 of the most commonly used documents in today's business world. Using real-world topics and themes, the lessons in this workbook provide hands-on practice to produce professionally written and formatted documents. From business letters to cover letters, the student will gain experience on how to write effectively and format documents properly using a word processing application.

Who Should Use This Book?

Formatting Business Documents is designed to be used by middle and high school students who are enrolled in a computer applications course that integrates the use of word processing software into the curriculum. It can also be used as a supplement in a variety of courses such as Communications, Writing, or Business English.

Why Learn How to Format Business Documents?

The way you communicate in a professional setting says a great deal about you even before the first personal interaction; from a simple business letter, a reader takes clues about your education, awareness of standard practices, and attention to detail. By using a standard format, you convey a sense of professionalism and help the reader get right to the message itself. By completing the lessons in this workbook, you will gain hands-on practice in using the acceptable standard format for the most commonly used documents in today's business world. Learning the standard formats of these documents will allow you to effectively communicate your message and this will help you prosper and succeed in your professional growth.

Formatting Notes

Depending on the resource referenced, users of this book may find minor variations in formatting guidelines. Every effort was made by the publisher to follow the most widely accepted format guidelines for each document contained within this book.

Spacing After Periods and Punctuation Marks: All documents in this book are shown using one space after a period or punctuation mark.

Materials Required

To complete the individual documents in this workbook, you will need the following:

- Formatting Business Documents* Student Workbook
- Any word processing software application

Note: Some documents in this workbook require students to include clip art that reflects the subject or purpose of the document. Use an instructor-approved source to find clip art for these documents.

Prerequisite Skills Required

In order to complete the documents in this book, the student should have a basic working knowledge of using word processing software. This book does not provide step-by-step-instructions specific to any one particular word processing software; rather, it provides general instructions for students to practice creating and formatting common business documents.

Activity Layout

Document Title: Identifies the type of document being produced.

Document Overview: Provides a description of each document and how/why it is used in the workplace.

Examples: Provides real-world examples of the documents being produced.

Goal: Identifies the objective of the activity.

Document Parts: Identifies the different parts of the document.

Skills: Lists the skills being reinforced.

Parts Description: Provides a description of each part of the document.

Scenario: Provides an overview of the activity and how/why the document will be used.

Document Setup: Includes information on what file name, orientation, margins, line spacing, font, and size to use in the document.

Instructions: Provides step-by-step instructions for completing each document.

Format Sample: Illustrates the proper document format and the text to be keyed.

Paragraph Marker: Illustrates blank lines used in the document.

Tab Indicator: Illustrates the use of the tab key in the document.

Curriculum Guide

DOCUMENT	NEW SKILLS
1 Memo	<ul style="list-style-type: none"> <i>Understanding the parts of a memo</i> <i>Using proper memo format</i> <i>Setting margins</i> <i>Aligning text</i> <i>Using the default tab</i> <i>Setting line spacing</i> <i>Formatting a bulleted list</i>
2 Block Style Business Letter	<ul style="list-style-type: none"> <i>Understanding the parts of a block style business letter</i> <i>Using proper block style letter format</i> <i>Setting margins</i> <i>Setting line spacing</i>
3 Modified Block Style Letter	<ul style="list-style-type: none"> <i>Understanding the parts of a modified block style letter</i> <i>Using proper modified block style letter format</i> <i>Setting tabs</i> <i>Setting margins</i> <i>Setting line spacing</i>
4 Personal Business Letter	<ul style="list-style-type: none"> <i>Understanding the parts of a personal business letter</i> <i>Using proper personal business letter format</i> <i>Setting margins</i> <i>Setting line spacing</i>
5 Envelope	<ul style="list-style-type: none"> <i>Understanding the parts of an envelope</i> <i>Using proper envelope format</i> <i>Setting margins (optional)</i> <i>Setting line spacing (optional)</i> <i>Formatting font sizes (optional)</i> <i>Setting tabs (optional)</i>
6 Business Letterhead	<ul style="list-style-type: none"> <i>Understanding the parts of business letterhead</i> <i>Formatting the header</i> <i>Changing font styles</i> <i>Formatting font size</i> <i>Inserting and formatting clip art</i> <i>Formatting a line shape</i>
7 News Release	<ul style="list-style-type: none"> <i>Understanding the parts of a news release</i> <i>Using proper news release format</i> <i>Setting margins</i> <i>Using the change case feature</i> <i>Setting line spacing</i> <i>Using the default tab</i>
8 Resumé	<ul style="list-style-type: none"> <i>Understanding the parts of a resumé</i> <i>Using proper resumé format</i> <i>Using correct line spacing</i> <i>Setting margins</i> <i>Formatting text</i> <i>Setting left and right aligned tabs</i> <i>Inserting a line shape</i>

DOCUMENT	NEW SKILLS
9 Cover Letter	<ul style="list-style-type: none"> <i>Understanding the parts of a cover letter</i> <i>Using proper block style letter format</i> <i>Using correct line spacing</i> <i>Setting margins</i>
10 Outline	<ul style="list-style-type: none"> <i>Understanding the parts of an outline</i> <i>Centering text horizontally on a line</i> <i>Using default tabs</i> <i>Using Roman numerals</i> <i>Using Arabic numbers</i>
11 MLA Style Report	<ul style="list-style-type: none"> <i>Understanding the parts of a report</i> <i>Using proper report format in MLA style</i> <i>Inserting page numbers</i> <i>Using first line indents</i> <i>Using block indents</i>
12 Works Cited Page	<ul style="list-style-type: none"> <i>Understanding the parts of a works cited page</i> <i>Using proper format on a works cited page in MLA style</i> <i>Inserting page numbers</i> <i>Renumbering page numbers</i> <i>Using hanging indents</i> <i>Sorting text A-Z</i>
13 Agenda	<ul style="list-style-type: none"> <i>Understanding the parts of an agenda</i> <i>Using proper agenda format</i> <i>Setting margins</i> <i>Aligning text</i> <i>Setting line spacing</i> <i>Formatting multi-level numbered lists</i> <i>Using various numbering styles</i>
14 E-mail	<ul style="list-style-type: none"> <i>Understanding the parts of an e-mail</i> <i>Appropriate use of the subject line</i> <i>Appropriate use of the salutation and complimentary closing</i> <i>Professional and polite tone in the body of the e-mail message</i> <i>Using the auto-numbering feature</i>
15 Table of Contents	<ul style="list-style-type: none"> <i>Understanding the parts of a table of contents</i> <i>Using tabs</i> <i>Using dot leaders</i>
16 Meeting Minutes	<ul style="list-style-type: none"> <i>Understanding the parts of a meeting minutes document</i> <i>Using proper meeting minutes format</i> <i>Setting margins</i> <i>Aligning text</i> <i>Changing line spacing</i> <i>Using correct paragraph alignment</i> <i>Formatting a block indent</i>

Documents



Memo

What is a memo?

A memo is a form of communication that moves within a company or organization and is written in a direct, professional tone. Typically, it calls attention to a specific topic or issue and addresses it. It is often brief and usually no more than one page.

Why is using a memo important?

Less formal than a letter, internally, a memo can be sent to an individual, small group, or an entire organization. A printed memo provides an easy way to ensure that all recipients have received the same message. Memos are most effective when they connect the purpose of the writer with the interests and needs of the reader.

Examples

- Memo to inform employees of a policy change
- Memo to inform staff of an upcoming meeting
- Memo to inform the recipients of updates to a previously communicated issue
- Memo to inform employees of price increases

Goal

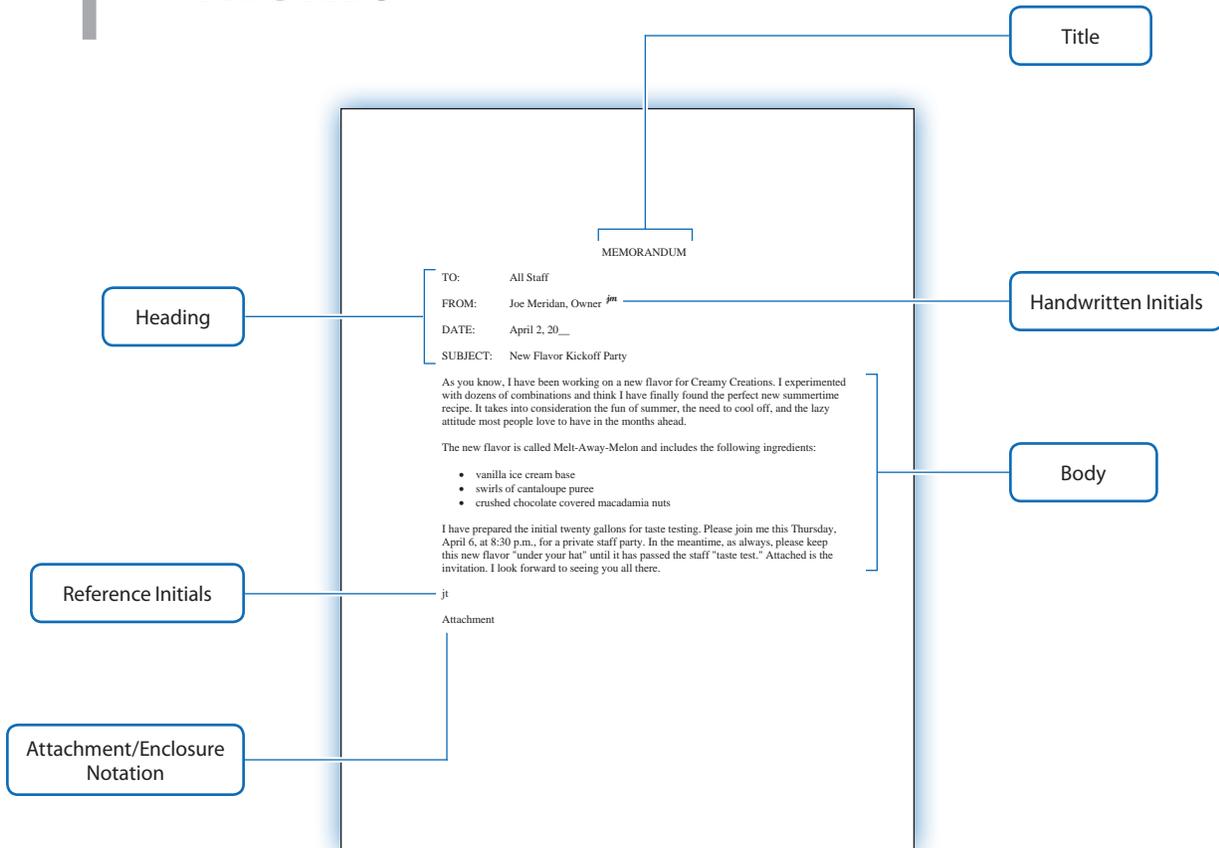
Use word processing software to learn and practice how to create and format a memo.

Skills

- Understanding the parts of a memo
- Using proper memo format
- Setting margins
- Aligning text
- Using the default tab
- Setting line spacing
- Formatting a bulleted list



1 Memo



Parts	Description
Title	Indicates the title of the type of document being sent.
Heading	The first part of a memo provides information about the author, the intended recipient, the subject, and the date. It includes the following information lines: TO: the recipient's name and job title (if applicable), FROM: the writer's name and job title (if applicable), DATE: the complete and current date, and SUBJECT: highlights what the memo is about.
Handwritten Initials	Signed initials of the writer to indicate that he/she has approved the memo. The initials replace the need for a full signature.
Body	The body of the memo has two parts: the purpose statement and the explanation. The purpose statement should clearly state the reason for the memo, followed by supporting details.
Reference Initials	Initials of the person (other than the author) who keyed the memo for the sender.
Attachment/Enclosure Notation	Indicates another document is attached or enclosed with the memo.

1 Memo

Scenario

Creamy Creations, an old-fashioned ice cream shop that makes its own ice cream, is known for its unique flavors. Owner, Joe Meridan, is always dreaming up new combinations. His customers come to expect an ice cream creation that they cannot find anywhere else. Joe likes to keep his new flavors secret from the public until each flavor passes the staff “taste test.” Joe needs to inform his staff about the upcoming private staff party at Creamy Creations where they will have a chance to try out the new flavor. He drafted a memo and his assistant, Julia Thatcher, typed it.



Document Setup

Start Up	Using word processing software, create a NEW document.
File Name	Save the file as: Doc1_Practice
Orientation	Portrait
Margins	Top 2", Left 1", Right 1", Bottom 1"
Line Spacing	Single, no additional spacing before and after paragraphs
Font, Size	Times New Roman, 12 pt.



Instructions

1. Follow the Document Setup instructions provided.
2. Refer to the Practice Document as you follow the instructions below.
3. Key the title MEMORANDUM, in all caps, center-aligned, then double space.
4. Key the heading of the memo, left-aligned, capitalizing TO, FROM, DATE, and SUBJECT. To align the heading details, use the tab key as shown. Double space between each line in the heading.
5. Key the body of the memo in single space, then double space between paragraphs.
6. Select the list of ingredients in the second paragraph and apply bullets.
7. As the person who keyed the memo for Joe, key Julia Thatcher’s initials in lowercase, then double space.
8. Key the attachment notation.
9. Carefully proofread your work for format and grammatical accuracy.
10. Resave the file.
11. Print a copy of the document if required by your instructor.
12. Sign the sender’s initials in the heading area if required by your instructor.

Document 1: **Memo**

LEFT 1"

TOP 2"

RIGHT 1"

MEMORANDUM

TO: ^{TAB 2X} All Staff

FROM: ^{TAB} Joe Meridan, Owner *jm*

DATE: April 2, 20__

SUBJECT: New Flavor Kickoff Party

As you know, I have been working on a new flavor for Creamy Creations. I experimented with dozens of combinations and think I have finally found the perfect new summertime recipe. It takes into consideration the fun of summer, the need to cool off, and the lazy attitude most people love to have in the months ahead.

The new flavor is called Melt-Away-Melon and includes the following ingredients:

- vanilla ice cream base
- swirls of cantaloupe puree
- crushed chocolate covered macadamia nuts

I have prepared the initial twenty gallons for taste testing. Please join me this Thursday, April 6, at 8:30 p.m., for a private staff party. In the meantime, as always, please keep this new flavor "under your hat" until it has passed the staff "taste test." Attached is the invitation. I look forward to seeing you all there.

jt

Attachment

BOTTOM 1"

Block Style Business Letter



What is a **block style business letter**?

A block style business letter is a typewritten form of communication that is formatted with all parts aligned to the left margin, hence, the name “block.” A business letter is used when corresponding with a representative from a business or organization. Most commonly, a business letter is sent through the mail, enclosed in a typed envelope. However, it may be sent electronically as an e-mail attachment, or sometimes even as a fax.

Why is using a **block style business letter** important?

Using a standard letter format, such as a block style, shows your attention to what is common in the business world. Business people are busy, and concise, professional writing presented in a standard way is expected and appreciated.

Examples

- Letter of request for company information
- Letter of complaint to a business
- Letter of inquiry to a company regarding a job opening
- Letter to a bank or credit card company
- Cover letter to accompany a resumé or application

Goal

Use word processing software to learn and practice how to create and format a block style business letter.

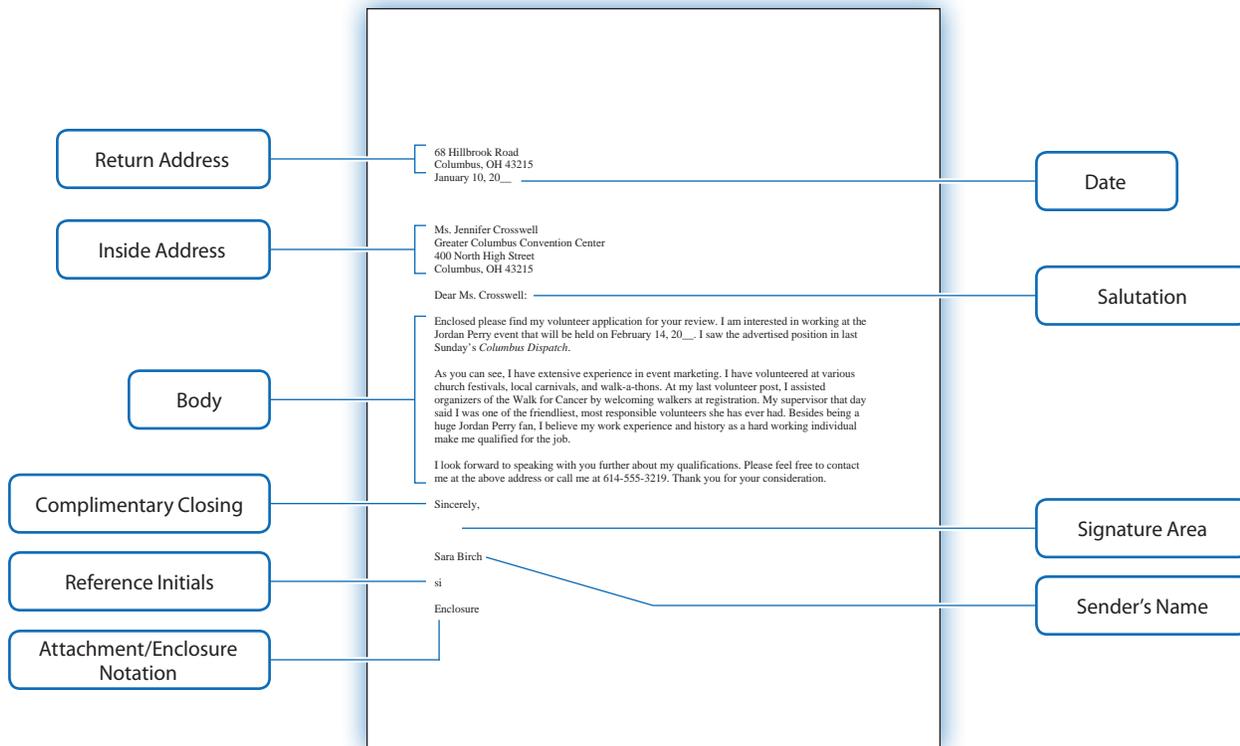
Skills

- Understanding the parts of a block style business letter
- Using proper block style letter format
- Setting margins
- Setting line spacing



2

Block Style Business Letter



Parts

Description

Return Address	The address of the person sending the letter (sender). Includes the street address, city, state, and zip code. Note: The return address does not include the sender's name.
Date	The date the letter is written.
Inside Address	Includes the following information of the person receiving the letter: courtesy title (Mr., Mrs., or Ms.), first and last name and his/her job title (if applicable), company name (if applicable), street address, city, state, and zip code.
Salutation	Includes the greeting (opening) of the letter, followed by the receiver's courtesy title and last name.
Body	Includes the details of the letter. The first paragraph should introduce and state the reason for the letter. The following paragraphs should provide details for why the letter is being written and any background information that supports the message.
Complimentary Closing	Typically includes a closing phrase and is used to show respect and appreciation for the person reading the letter.
Signature Area	The space for the sender's signature.
Sender's Name	Includes the sender's first and last name, followed by his/her job title (if applicable).
Reference Initials	Initials of the person (other than the author) who keyed the letter for the sender.
Attachment/Enclosure Notation	Indicates another document is attached or enclosed with the letter.

2 Block Style Business Letter

Scenario

The Greater Columbus Convention Center is hosting a concert for national recording artist Jordan Perry. The convention center is looking for volunteers to work at the event. Although you don't get paid, you get a backstage pass for a meet and greet with the artist. Your task is to type the letter that job seeker Sara Birch wrote to the manager of the convention center as to why she should be considered for the job. Since you are keying the letter for Sara, you will use your initials for the reference initials.



Document Setup

Start Up	Using word processing software, create a NEW document.
File Name	Save the file as: Doc2_Practice
Orientation	Portrait
Margins	Top 2", Left 1", Right 1", Bottom 1"
Line Spacing	Single, no additional spacing before and after paragraphs
Font, Size	Times New Roman, 12 pt.



Instructions

1. Follow the Document Setup instructions provided.
2. Refer to the Practice Document as you follow the instructions below.
3. Key the return address and date shown, then quadruple space.
4. Key the inside address, then double space.
5. Key the salutation, then double space.
6. Key the body of the letter in single space, then double space between paragraphs.
7. Key the complimentary closing, then quadruple space.
8. Key the sender's name, then double space.
9. As the person who keyed the letter for Sara, key your initials in lowercase, then double space.
10. Key the enclosure notation.
11. Carefully proofread your work for format and grammatical accuracy.
12. Resave the file.
13. Print a copy of the document if required by your instructor.
14. Sign the sender's name in the signature area if required by your instructor.

Document 2: **Block Style Business Letter**

LEFT 1"

TOP 2"

RIGHT 1"

68 Hillbrook Road
Columbus, OH 43215
January 10, 20__

Ms. Jennifer Crosswell
Greater Columbus Convention Center
400 North High Street
Columbus, OH 43215

Dear Ms. Crosswell:

Enclosed please find my volunteer application for your review. I am interested in working at the Jordan Perry event that will be held on February 14, 20__. I saw the advertised position in last Sunday's *Columbus Dispatch*.

As you can see, I have extensive experience in event marketing. I have volunteered at various church festivals, local carnivals, and walk-a-thons. At my last volunteer post, I assisted organizers of the Walk for Cancer by welcoming walkers at registration. My supervisor that day said I was one of the friendliest, most responsible volunteers she has ever had. Besides being a huge Jordan Perry fan, I believe my work experience and history as a hard working individual make me qualified for the job.

I look forward to speaking with you further about my qualifications. Please feel free to contact me at the above address or call me at 614-555-3219. Thank you for your consideration.

Sincerely,

Sara Birch

si

Enclosure

BOTTOM 1"

Modified Block Style Letter



What is a **modified block style letter**?

A modified block style letter is a common format used when writing a business letter. It varies slightly from a block style letter with the major difference being the placement of the return address, date, and complimentary closing. Since the return address, date, and complimentary closing begin at the center, a custom tab is set at the center of the page. All other parts begin at the left margin.

Why is using a **modified block style letter** important?

Like all letters, concise, well-written content is important for getting your message across to your reader. Using a familiar letter format such as modified block style shows the recipient your professionalism.

Examples

- Complaint letter to business for unsatisfactory service
- Letter of inquiry to a company
- Letter to a bank or credit card company
- Letter to a school official

Goal

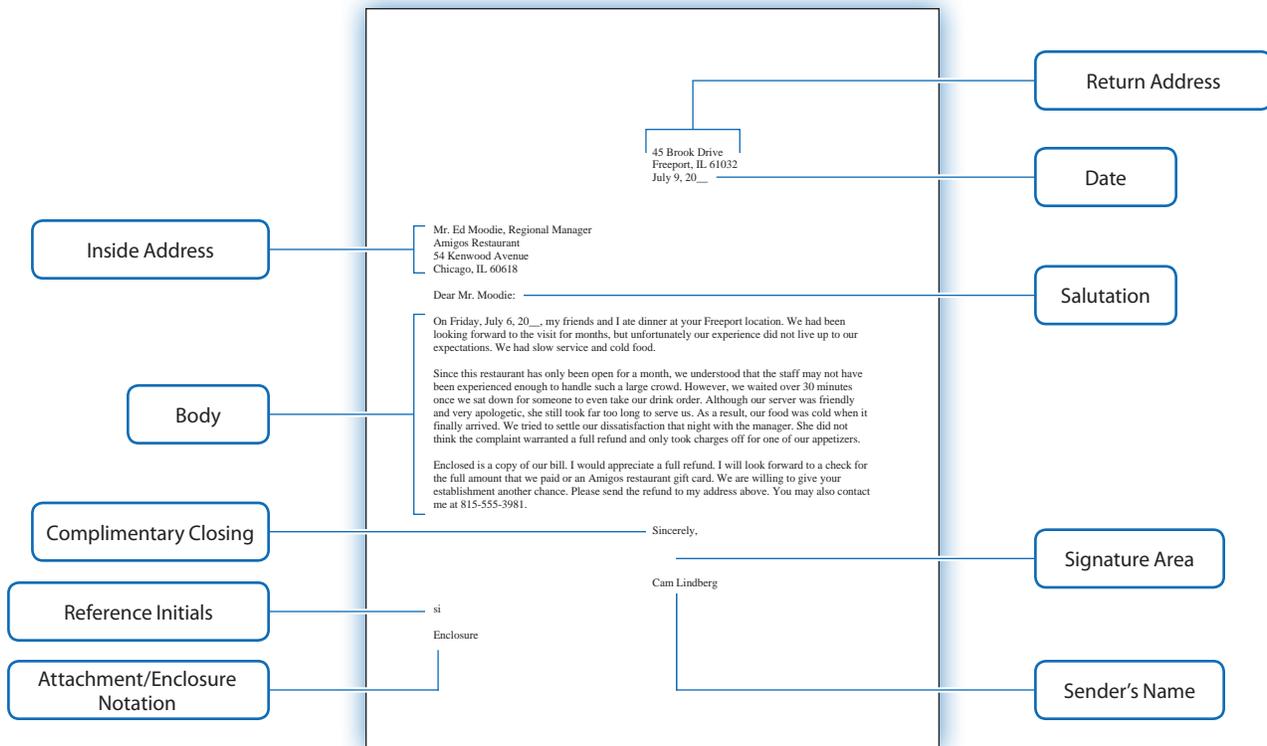
Use word processing software to learn and practice how to create and format a modified block style letter.

Skills

- Understanding the parts of a modified block style letter
- Using proper modified block style letter format
- Setting tabs
- Setting margins
- Setting line spacing



Modified Block Style Letter



Parts

Description

Return Address	The address of the person sending the letter (sender). Includes the street address, city, state, and zip code. Note: The return address does not include the sender's name.
Date	The date the letter is written.
Inside Address	Includes the following information of the person receiving the letter: courtesy title (Mr., Mrs., or Ms.), first and last name and his/her job title (if applicable), company name (if applicable), street address, city, state, and zip code.
Salutation	Includes the greeting (opening) of the letter, followed by the receiver's courtesy title and last name.
Body	Includes the details of the letter. The first paragraph should introduce and state the reason for the letter. The following paragraphs should provide details for why the letter is being written and any background information that supports the message.
Complimentary Closing	Typically includes a closing phrase and is used to show respect and appreciation for the person reading the letter.
Signature Area	The space for the sender's signature.
Sender's Name	Includes the sender's first and last name, followed by his/her job title (if applicable).
Reference Initials	Initials of the person (other than the author) who keyed the letter for the sender.
Attachment/Enclosure Notation	Indicates another document is attached or enclosed with the letter.

3 Modified Block Style Letter

Scenario

Cam Lindberg and his friends love to try different restaurants and are self-proclaimed “foodies.” When a new spot opens, they immediately make plans for a night out. Like all customers, Cam and his friends expect good service. They all worked in restaurants in some aspect, so they know the demands customers can put on the waitstaff, but that doesn’t stop them settling for nothing short of the best. When service is bad, they see it as a responsibility of theirs to let the management of the restaurant know. The group recently visited Amigos, the new Mexican restaurant in town, and Cam wants the manager to be aware of some concerns they had while dining. Since you are keying the letter for Cam, you will use your initials for the reference initials.



Document Setup

Start Up	Using word processing software, create a NEW document.
File Name	Save the file as: Doc3_Practice
Orientation	Portrait
Margins	Top 2", Left 1", Right 1", Bottom 1"
Line Spacing	Single, no additional spacing before and after paragraphs
Font, Size	Times New Roman, 12 pt.



Instructions

1. Follow the Document Setup instructions provided.
2. Refer to the Practice Document as you follow the instructions below.
3. Set a left tab at 3.25”.
4. Tab to 3.25” and key the return address and date, then quadruple space.
5. Key the inside address, then double space.
6. Key the salutation, then double space.
7. Key the body of the letter in single space, then double space between paragraphs.
8. Tab to 3.25” and key the complimentary closing, then quadruple space.
9. Tab to 3.25” and key the sender’s name, then double space.
10. As the person who keyed the letter for Cam, key your initials in lowercase, then double space.
11. Key the enclosure notation.
12. Carefully proofread your work for format and grammatical accuracy.
13. Resave the file.
14. Print a copy of the document if required by your instructor.
15. Sign the sender’s name in the signature area if required by your instructor.

Document 3: **Modified Block Style Letter**

LEFT 1"

TOP 2"

RIGHT 1"

TAB

45 Brook Drive
Freeport, IL 61032
July 9, 20__

Mr. Ed Moodie, Regional Manager
Amigos Restaurant
54 Kenwood Avenue
Chicago, IL 60618

Dear Mr. Moodie:

On Friday, July 6, 20__, my friends and I ate dinner at your Freeport location. We had been looking forward to the visit for months, but unfortunately our experience did not live up to our expectations. We had slow service and cold food.

Since this restaurant has only been open for a month, we understood that the staff may not have been experienced enough to handle such a large crowd. However, we waited over 30 minutes once we sat down for someone to even take our drink order. Although our server was friendly and very apologetic, she still took far too long to serve us. As a result, our food was cold when it finally arrived. We tried to settle our dissatisfaction that night with the manager. She did not think the complaint warranted a full refund and only took charges off for one of our appetizers.

Enclosed is a copy of our bill. I would appreciate a full refund. I will look forward to a check for the full amount that we paid or an Amigos restaurant gift card. We are willing to give your establishment another chance. Please send the refund to my address above. You may also contact me at 815-555-3981.

Sincerely,

TAB

Cam Lindberg

si

Enclosure

BOTTOM 1"