BSBADM506
Manage business document design and development

Release 1

Learner guide

Aspire
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Contents

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Before you begin

This learner guide is based on the unit of competency *BSBADM506 Manage business document design and development*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: www.training.gov.au.

How to work through this learner guide

This learner guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the learner guide you need to read, and which practice tasks and learning checkpoints you need to complete. The features of this learner guide are detailed in the following table.

Feature of the learner guide	How you can use each feature
Learning content	Read each topic in this learner guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
Examples and case studies	Examples of completed documents that may be used in a workplace are included in this learner guide. You can use these examples as models to help you complete practice tasks and learning checkpoints. Case studies highlight learning points and provide realistic examples of workplace situations.
Practice tasks	Practice tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
Video clips	Where QR codes appear, learners can use smartphones and other devices to access video clips relating to the content. For information about how to download a QR reader app or accessing video on your device, please visit our website: www.aspirelr.com.au/help
Summary	Key learning points are provided at the end of each topic.
Learning checkpoints	There is a learning checkpoint at the end of each topic. Your trainer will tell you which learning checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.

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Foundation skills

As you complete learning using this guide, you will be developing the foundation skills relevant for this unit. Foundation skills are the language, literacy and numeracy (LLN) skills and the employability skills required for participation in modern workplaces and contemporary life.

The following table outlines specific foundation skills noted for your learning in this learner guide.

Foundation skill area	Foundation skill description
Learning	• Actively reinforces own knowledge and skills by training others
Reading	• Evaluates information from complex texts, including organisational policies and procedures • Extracts and evaluates information from a range of support sources to extend understanding
Writing	• Selects text type, subject matter and language to suit a specific audience and purpose • Organises content to support the purposes and format of the product
Oral communication	• Participates in verbal exchanges to gain information • Uses listening and questioning techniques to clarify and confirm understanding • Presents complex technical information adjusting presentation style and vocabulary to suit audience
Numeracy	• Recognises and interprets numerical information related to budgets
Navigate the world of work	• Recognises and adheres to organisational and legislative requirements
Interact with others	• Actively identifies requirements of important communication exchanges, selecting appropriate channels, format, tone and content to suit purpose and audience
Get the work done	• Applies formal processes when planning complex tasks, producing plans with logically sequenced steps, reflecting an awareness of time constraints • Systematically gathers and analyses all relevant information and evaluates options to make informed decisions • Utilises a broad range of complex features within digital applications to improve productivity, optimising software functions for specific purposes

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What do you already know?

Use the following table to identify what you may already know. This may assist you to work out what to focus on in your learning.

Topic	Key outcome	Rate your confidence in each section
Topic 1 Establish documentation standards	1A Identify organisational requirements for document design and production	❑ Confident ❑ Basic understanding ❑ Not confident
	1B Evaluate the organisation's IT capability in terms of document design and production	❑ Confident ❑ Basic understanding ❑ Not confident
	1C Identify types of documents used and required by the organisation	❑ Confident ❑ Basic understanding ❑ Not confident
	1D Establish documentation standards and design tasks	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 2 Manage template design and development	2A Ensure standard formats and templates suit document requirements	❑ Confident ❑ Basic understanding ❑ Not confident
	2B Ensure templates enhance readability and appearance, and meet style and layout requirements	❑ Confident ❑ Basic understanding ❑ Not confident
	2C Test templates, obtain feedback and make necessary amendments	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 3 Develop standard text for documents	3A Evaluate software functions for their usefulness in automating document production	❑ Confident ❑ Basic understanding ❑ Not confident
	3B Match document requirements with software functions	❑ Confident ❑ Basic understanding ❑ Not confident
	3C Test macros to ensure they meet document requirements	❑ Confident ❑ Basic understanding ❑ Not confident

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Topic	Key outcome	Rate your confidence in each section
Topic 4 Develop and implement strategies to ensure the use of standard documentation	4A Prepare explanatory notes for the use of templates and macros	❑ Confident ❑ Basic understanding ❑ Not confident
	4B Develop and implement training in the use of templates and macros	❑ Confident ❑ Basic understanding ❑ Not confident
	4C Manage master files	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 5 Develop and implement strategies for maintaining and improving documentation	5A Monitor use of templates and macros, and evaluate document quality	❑ Confident ❑ Basic understanding ❑ Not confident
	5B Review documentation standards against the changing needs of the organisation, and plan and implement improvements	❑ Confident ❑ Basic understanding ❑ Not confident

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Topic 1
Establish documentation standards

Within any sizeable organisation or business, there is a need for some form of document control. This allows all staff to prepare documents with a consistent look, maintain quality standards as identified by the organisation and legislation, produce documents efficiently, track changes to templates and macros, and make improvements where necessary.
In managing an organisation's documents, you need sound knowledge of what your organisation requires in terms of the types of documents, image, styles and layout, storage and transmission requirements, as well as the organisation's IT capabilities.

In this topic you will learn how to:

1A Identify organisational requirements for document design and production

1B Evaluate the organisation's IT capability in terms of document design and production

1C Identify the types of documents used and required by the organisation

1D Establish documentation standards and design tasks

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1A Identify organisational requirements for document design and production

In today's business environment, almost all documents are created and maintained electronically using a range of commercial or organisational software packages. Be familiar with the ones your organisation uses such as databases, desktop publishing, spreadsheets and word processing, and know when to use each type of software. You may need to arrange training for team members. Make sure your own skills are up to date as software technology continues to improve and new programs are regularly added to software provisions.

Criteria for document production

To ensure documents such as business letters, reports, forms, newsletters and memos are consistent in style and layout, a design format is generally applied and a document control procedure is in place. This allows as organisation's communications to reflect the desired style and standard of quality.

Managers need to ensure they know the format and standards required for each type of document the organisation produces. They also need to be able to explain these requirements to new staff members. Managers should ensure staff they are responsible for follow the procedures for producing documents and maintaining the standards set by the organisation.

The following design and production criteria are commonly used and should be adhered to by staff responsible for producing documents.

Design and production criteria
Maintain a format in line with the company brand. This will protect, maintain and enhance the company's reputation.
Set a quality standard that dictates everything from the language used to the print size of the text and the dots-per-inch (dpi) print quality of the finished document.
Maintain content protection through specified formatting and the inclusion of legal notices, disclaimers, statements and/or copyright notices.
Comply with anti-discrimination legislation, ethical principles, codes of practice and privacy laws.
Create an archiving protocol, including version control for document retrieval and version identification. Contracts, manuals and procedures may need regular updating.

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Ethical and legal requirements

Using non-gender-specific terminology, unambiguous wording and an appropriate tone will assist a document developer to comply with anti-discrimination legislation, ethical principles, codes of practice and privacy laws. The following provides more information about these important requirements.

Legal requirements

Develop documents that comply with anti-discrimination laws and organisation-specific inclusions such as privacy statements. Using inclusive language and making documents accessible to people with a disability are examples of complying with anti-discrimination legislation. Documents should be checked by legal advisors to ensure applicable disclaimers, such as copyright, are included.

Privacy requirements

Develop documents that protect customer information and inform customers of the organisation's privacy policy. Using encryption to protect customer information, including an opt-out clause for customers who do not wish to receive marketing material, including a statement about privacy and providing a link to the full privacy policy are examples of strategies.

Ethical requirements

Develop documents that provide sufficient information to customers. Use clear, simple English and provide a full statement about a product or service.

Phases of typical document production

To ensure that organisational documentation is designed and developed in accordance with both legislative and organisational requirements, it is important that you are able to apply the phases of a typical document production process. Here are the five main phases undertaken in this process.

The five major phases of a typical document production process

1

Establish standards

Establish documentation standards (or processes such as checking organisational and legislative standards, and evaluating technological capability).

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2

Manage design

Manage template design and development (or consider audience, purpose, language, document layout, etc.).

3

Develop standard text

Develop standard text for documents (or evaluate and test macros and other software functions for their usefulness in reducing document production time).

4

Implement strategies

Develop and implement strategies to ensure the use of standard documentation (or prepare explanatory notes, implement training and store master files).

5

Maintain and review

Develop and implement strategies for the maintenance and improvement of standard documentation (or review document, template and macro use and make improvements where necessary).

Design formats

In many organisations, all documents, whether those being sent from the organisation or those for organisation personnel use only, will follow a format or template that is designed to meet the organisation's criteria. Templates are established style models used to create documents. Make sure you understand all of the organisation's requirements so you can maintain quality standards within your team and train new team members when needed. Learn the technical skills needed to manage design requirements and layouts.

Specific formatting requirements may include:

- the size and location of the company logo; for example, at the top right of the document and 3 x 2 centimetres
- a subject line
- the size and type of font
- whether the text is justified or not
- the size of headings and subheadings
- the use of white space
- content in footers and headers; for example, a network pathway in the footer such as <F:/Docs/Letters/Out/2015/Any_Name.doc>
- specified inclusions; for example, disclaimers or ownership warnings in specific types of documents.

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Formats for templates and macros

Templates define the preferred layout and text formatting for the document. This helps simplify the production of a document as users only need to input the information required for their particular document. Most organisations store electronic pre-formatted templates for use in producing documents such as memos, letterheads, faxes, invoices, standard customer letters, staff letters and invitations.

Here are examples of some common features found in templates.

Macros

Templates may include macros (a single command or 'click button' that is part of a spreadsheet or word processing application), which execute a series of shortcut commands such as applying a date format or signature box to a generated document, or the insertion of a pre-formatted text disclaimer for specific clients.

Business letters

A typical template for a business letter may include a letterhead, file references, formatted text area, designated text font and size, layout (location of the text on the page) and signature blocks, plus disclaimers or copyright notices.

Style guide

Many organisations develop a style guide that outlines the templates and formatting to be used and provides guidance on other areas such as writing style, terminology, language, grammar, spelling, punctuation and copyright laws. It may be your role to prepare a guide for the organisation if there isn't one, or to update an existing one.

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Storage

There are a number of aspects to consider when storing documents. Some industries, such as the health, law, education, real estate and finance industries, have requirements under either legislation, regulations, codes of practice or registration rules for archiving certain documents and maintaining them for a specific period of time.

Considerations for storing documents
• Documents should be stored as templates on a central server so everyone has access to them. • Make sure file paths are structured logically and meet organisational requirements. • Be aware of legal obligations for the storage or recording of issuance associated with the documents you are producing. • An organisation should have a secure document backup procedure.

Output

Output is the format that the organisation requires documents to be in. Some organisations may also require that clients receive information or notifications in a specified format; for example, a client must be informed by letter as an email is neither sufficient nor appropriate to meet a legal requirement. Another example may be where organisational policy dictates that all meeting minutes must be recorded using the organisation's template and placed on the intranet.

Example: the importance of a systematic and consistent approach

A large property development company has a document standards and style guide. However, the new manager discovers that it has not been reviewed for nearly six years.

There are several macros in the office software suite, mostly made by staff members to automate their own processes, but not accessible by all personnel. In addition, there are no electronic document standards. The production of stationery, including letterheads, is outsourced. These documents now seem old-fashioned and in need of an update, and although the office is now completely computerised, there are no templates.

The company needs to identify the documents it produces, or could produce, internally. By systematically looking at the functions of the department, the new manager follows the flow of documents that includes letters, emails and memos – all requiring, but as yet not employing, a common format, look or 'brand'. The manager also notes that a range of styles is used when writing to various clients. There is also a need to standardise the content.

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Practice task 1

1. Read your organisation's document production rules, policy or procedures, or those for an organisation you are familiar with (these may be part of a broader policy or operating procedure or may be contained in a style guide). In dot-points, provide comments you might make to your manager about the quality of the instructions. For example, how comprehensive are they? Do you think they need to be updated or made more user-friendly?

2. In addition to the formats or templates, what document control measures does the organisation have in place?

3. What legal or other requirements are there for storing or archiving the organisation's documents?

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1B Evaluate the organisation's IT capability in terms of document design and production

The design and production of business documents depends on an organisation's information technology (IT) capabilities.

An organisation's limitations may include:

- the power of its computers
- the software applications they have
- the creative skills of its workforce
- cost constraints that affect the quality of the technology purchased.

Analyse current and future document production needs

Analyse your organisation's current and future document production needs at suitable intervals to see whether the existing technology is sufficient to maintain the organisation's standards or whether the system needs to be overhauled, new purchases made or staff up-skilled.

At the same time you evaluate your organisation's IT capabilities, you need to assess what types of documents you intend producing. For example, if there is only a requirement to produce correspondence such as letters, memos, newsletters, emails and the occasional flyer, this can be easily managed using a word processing application, a basic computer system and an inkjet printer. Conversely, if you require glossy colour brochures and books or tiny-typeface contracts, more-advanced computing power and applications and printing options are required.

Workplace IT resources

By identifying and evaluating the IT resources that are available to the organisation, you can determine what limitations there are in terms of document production or if current IT infrastructure can meet your requirements. These requirements will depend on the type of documentation your organisation needs to produce, the quality standards required and the organisation's goals.

Here are aspects of the organisation's IT resources that should be evaluated.

Evaluate the following:

- The quality of the documents the organisation is producing now
- The quality of documents the organisation would like to be able to produce
- The software the organisation currently has
- The organisation's plans for purchasing any new productivity software in the near future
- The IT hardware currently used by the organisation
- Software skills currently existing within the organisation
- Any cost constraints the organisation has

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Software

The default standard in business is generally seen as the Microsoft Office products such as Word and Excel; however, there are other highly capable office software suites available to purchase including Apple's iWork, and Corel's WordPerfect Office.

Some free software produces relatively good quality office documents. The web application Google Docs provides fairly content-rich and capable word processing, spreadsheets, presentation, database and image editing applications that are compatible with more-expensive retail products.

For dedicated desktop publishing software at the upper end of the market, there are few products as widely used as the commercial products: Microsoft's FrontPage and Publisher, or more commonly at a professional publishing level, Adobe's Creative Suite (CS) or Creative Cloud (CC) that incorporates several design and publishing applications. There are also some freeware desktop publishing applications available to business, such as Scribus.

Application software

The most important part of using or accessing organisation software is having the understanding behind its application. What is the software's purpose? What does it do in the documentation process? Which software is most relevant to document design and development in any organisation?

Application software is usually a group or set of computer programs that have been designed to allow the user to perform a variety of coordinated functions. An example of application software could include a spreadsheet design and management system or simple word processor. Other software could include simulations, games and drawing tools. Applications may be bundled with the computer and its system software or published separately, and may be coded as proprietary.

Types of application software may include:

- accounting software
- media players
- office suites.

Hardware

Software is only half the equation when developing in-house documents. Some software is quite processor intensive, which means that it may require a proficient and modern processor and memory-equipped system on which to operate.

There is also the requirement, where hard copies of documents are required, for quality printing hardware such as high-resolution colour inkjet or laser printers. This is particularly relevant for documents that contain images or photographs.

Here are examples of hardware that you may need to consider.

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Printers

Does your current printer have sufficient capability to print quality images or will you need to upgrade?

Scanners

Do you have or need a scanner for inserting photographs or images? Is it of sufficient quality for desktop publishing?

Digital imaging

Do you have access to a digital camera or digital video recorder for photography within the organisation?

DVD production

If you are copying company documents to DVD, even for storage purposes, do you have enough DVD writers in your office?

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Hard-drive storage

Do you have sufficient hard-disk capacity for your backup, storage and archiving needs?

USB drives

Do you need USB drives for saving and transferring documents?

Networking

Do you require multiple machines that you need to print from, or multiple printers to print to? If so, do you have network access?

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Cost constraints

Cost constraints are an issue within any organisation. A manager may want to produce high-quality, professional documents, but a supporting budget is necessary for these goals to become reality. Like any production project, the budget must be managed for document production.

Where budgets are tight and an organisation requires hard-copy documentation, the best investment an organisation can make is in a quality printer. Finished documents that need to be printed may look acceptable on a quality monitor, but can be let down by the quality of the printer. When volume printing is required, speed and quality can be attained by even a modestly priced colour laser printer. In the past few years, the price of laser printers has fallen dramatically, but a cheap purchase price can be indicative of high cost-per-page when the price of replacement consumables is taken into account. Where very large quantities of documents are required, such as for letterhead paper, it may be more economical to outsource printing.

Be aware of the budget before moving ahead with any document production. It may be your responsibility to prepare the budget with other senior managers or it may be your role to monitor spending against targeted costs.

Example: understand the organisation's IT capability

Rob Greenaway, IT manager with an engineering firm, has been asked by Tracey, a new manager, to confirm whether the organisation has the required software and hardware to produce the documents her team needs to produce.

Rob identifies several printers of different quality, including a high-quality colour laser printer and two A3-sized high-resolution inkjet printers. After a discussion with the purchasing department, he also finds out that the company is purchasing a ring-binding machine and an A3 laminating machine in the current year's budget.

The software already available on their network includes Microsoft Office software – Word, Excel, Publisher and PowerPoint. He discovers there are plans to purchase Adobe CS6, which will allow high-quality print-layout and graphics design.

He and Tracey document the results of his audit. Tracey then lists the types of documents her team will produce. Together with the budget she has been given, she now has a fair idea of the quality of documents she can produce.

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Practice task 2

1. List all the hardware and software you have available to produce documents at your organisation, or one you are familiar with, in this table.

IT resources for documentation	
Hardware	**Use**
Software	**Use**

2. What print quality can your organisation offer (dpi and number of colour processes)?

3. What size document can you produce (paper sizes)?

4. What additional software or hardware do you think you need in the future? Why?

5. List any cost constraints that may affect document production. Refer to your organisation's IT budget if relevant.

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1C Identify types of documents used and required by the organisation

The type and number of documents produced will depend on the nature of your organisation's business.

Documents produced could include:

- spreadsheets and databases
- a range of business letters and forms
- email, memos and faxes
- web pages
- flyers, brochures, newsletters and business cards
- reports
- tenders
- booklets
- certificates or awards.

Know current and future requirements

A useful exercise is to have a team meeting and brainstorm all the different types of documents you and your team produce and give reasons why they are needed. Categorise the documents into those produced for in-house use and those for external use. Next, list any documentation not included on your list that the organisation produces through other departments or that are outsourced.

To establish future needs, your first reference should be the organisational business plan. By referring to the business plan, you can identify whether there will be new business areas emerging. Secondly, consult with senior and other departmental managers to determine if the organisation is capable of producing such documents and whether it would be financially viable or cheaper to outsource this role.

Here are some questions that need to be considered.

What documents are produced for in-house use only?

- Can the number of these be decreased or are they all still serving their purpose?

Who are our clients?

- Who do we send our documentation to?
- Will we still be dealing with them in the future?
- Are these internal-only documents?

What format do they/we require information in?

- Paper (book, booklet, flyer, memo, letter, poster or brochure), electronic (email, PDF, spreadsheet or presentation), or both?

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Can we produce these in-house?

- Do we currently have sufficient software, hardware, peripherals and staff skills?

Will we be able to produce these in-house in the future?

- Are we purchasing the hardware, software or peripherals we require?
- Is there training scheduled for staff or are we recruiting specialist personnel?

If not, do we need to be able to produce these in-house?

- Must the client have it in this format?
- Can we substitute a different format (e.g. electronic)?

Is it financially viable?

- If we must produce documents in this format, how much will it cost?
- Is there a commercial alternative, such as using digital (low-volume) printing companies that we can outsource to?

Example: identify documentation needs

A medium-sized independent hardware distributor based in Sydney's northern suburbs recently decided to produce more documents in-house, and needs to determine what their documentation requirements are. A brief study finds that the company sends out over 500 pieces of external documentation and 2,000 internal documents per month that should be formatted and have document standards applied. These include letters to suppliers, customers and allied organisations; formal emails; office minutes and memos; and a company-wide weekly circular.

The office manager researches the various types of documents used and narrows down the total requiring a company 'brand' format to the following eight:

- General correspondence
- Letters of demand
- Advisory letters to account holders
- Formal email credit reminders
- Informal external emails
- A customer spreadsheet
- An inventory spreadsheet
- Newsletters

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Practice task 3

Identify and collect a sample of each document type used in your organisation. Create a cover sheet for each, explaining its purpose. Label those that are for in-house use only and those that are for external use. For privacy purposes, blank template versions are preferred, or documents filled with dummy text. However, if these are not available, ensure any names (other than your own) are blanked out with a marker pen (on hard copy) or deleted (from electronic copy).

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1D Establish documentation standards and design tasks

Documentation standards describe the way documents should look in line with the image the organisation wishes to convey. They specify design features such as the type and size of fonts used, layout and use of the company logo. They also extend to the language and writing style used as well as the type of finish used to present the document, if appropriate.

The look and quality of your documents says a great deal about your organisation and its level of professionalism. To ensure standards are maintained, there may be procedures for drafting, editing and proofing documents. In most instances everyone producing documents must comply with organisational procedures for document design and production. However, in some cases you may need to follow customer requirements; for example, a specific layout for a government tender or report.

Here are examples of documentation standards.

Technology requirements

Technology requirements include the hardware and software needed to produce the documents. Different word processing and desktop publishing software provides different advantages and can produce documents of greatly varying quality. The expense of top-end graphics and document design software must be justified against the number of documents produced and the staff training required to achieve the software's potential.

Information communicated

If the organisation communicates with other professional organisations, the standard of the document must be high in quality and content to project the proper image. Conversely, where documents only need to be notes or other brief or informal correspondence, print quality and design are not as critical, though it is essential to maintain standards of grammar, spelling and ethics. The type of information communicated also dictates the type and size of documents produced.

Budget and time constraints

Whereas most documentation changes result in reduced overhead costs, some result in increased costs but are necessary for legislative compliance. Documentation changes that occur because of organisation or legislative change would generally be counted as business overhead costs that need to be covered from across the whole organisation.

Everything in printing and publishing has a quality and price range. Spending a disproportionate amount of money on IT, then opting for budget paper to save money can be a trap that lowers the overall standard of documents produced. Aim for a balanced approach.

Document development, implementation and review stages take varying amounts of time due to the size and characteristics of the organisation and the size of the documentation change. If some changes are not implemented quickly, there can be costs for the organisation; for example, those driven by legislative or organisational change.

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Managers can ensure that there are no unnecessary delays in any of the stages due to poor communication. Assertive, timely communication and the use of project management, change management and budgeting skills can enable the time management of business document design and development.

Develop a style guide

Style guides or procedures and templates complement each other in document production. A style guide or procedure manual explains the appropriate use and style of language; design elements such as margins, indentations, line spacing and paragraph settings; terminology to be used; desired spelling, grammar and punctuation; and how to cover and present the document. There may be information on copyright, plagiarism and privacy. These are all taken into consideration when developing a template.

Many organisations base their style guide requirements on the *Style Manual: For Authors, Editors and Printers*. There are many other excellent resources available online and in book form to provide guidance in document design. A style guide enables an organisation to project a professional image, to save time and money and to decrease uncertainty for staff. You may choose to have the style guide in hard copy, but it is always advisable to keep an electronic copy for ease of updating.

For templates and style guides to be effective, they need to have the following attributes.

Known

Make sure all staff are familiar with style requirements and the existence and use of the style guide. Encourage them to ask for help if they are unsure.

Accessible

Everyone who produces documents for the company needs to be able to access the reference guide or templates, but not alter them.

Clear

Do not include ambiguous statements. Where possible, use graphics (such as screen dumps) to illustrate; they need to be easy to understand.

Concise

In defining where and when inclusions are to be made, you must ensure that the directions are exact, particularly for legal statements.

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Guidance on design

A style guide should address three broad areas: design, content and finish. Become familiar with the various standards; for example, you may need to research different fonts, page layout software or binding methods if you are uncertain what is required.

Here are some examples of design requirements that should be included in a style guide.

Electronic/ paper media	List the documents that should be electronic or paper-based; for example, hard copies are required for board papers, AGM papers and reports, whereas computer-generated documents are required for newsletters, staff meeting agendas and minutes.
Creating templates	Explain the requirements for designing, saving and storing templates.
Binding style	The style and material used for the front and back cover and the type of binding used to hold the pages together can greatly affect the overall presentation. List the binding methods appropriate to each document in terms of cost, style needed and purpose; for example, stapling, punch bound, comb binding, velobind, spiral or coil bind, wire, sealed, thermal or glued ZipBind or Proclip.
Cover appearance	Nominate the preferred style for covers. You may choose to apply different covers for different design standards or tasks.
Margins and fonts	Describe the margins, fonts and text size to be used on most documents. Define spacing for paragraphs and lists. Provide details of specific requirements; for example, Arial bold for all headers; 14pt size for main headings; Times New Roman 12pt for body text.
Headers and footers	Headers should include the title of the report. A footer may be included to indicate the file path, version and date.
Drawings and images	List the dpi requirement for images (that is, the resolution of images to be used). Specify the quality of hand-drawn images. Describe the use of copyright or other protected materials.

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Guidance on content

A style guide provides standards for users who will be writing content for organisational publications and documents. Subjects such as formatting, language, style, drafting, editing, proofing, legal and regulatory requirements and document approval all need to be addressed.

Here is information that will need to be considered when creating content for a workplace document.

Writing/language

Explain the appropriateness of the content for the documentation's purpose. Specify the use (or not) of abbreviations, jargon and acronyms. There may also be definitive direction on not using 'texting' abbreviation, slang or colloquialisms. Discuss the correct use of spellchecking.

Style

Explain the organisation's style and how it promotes a corporate identity. Discuss the style and tone used for specific document types; for example, firm and succinct for debtors; respectful and open for creditors.

Formatting

Specify the use of lists, dot-point/numbering, punctuation, justification (left/centre/right justified), text and line spacing, and paragraph spacing (points before/after) for certain document types.

Drafting

Describe any requirements for first and second drafts to be approved or passed to the next stage.

Editing and proofing

Describe the editing and proofing process. Include whether this is done by the drafter of the document, or a supervisor or manager. Also consider whether the document needs to be passed by legal advisors (and if so, under what circumstances).

Legal/regulatory requirements

Describe the necessary inclusions for legal/regulatory purposes (specifying which document type requires what inclusions); for example, the regulatory disclaimer attached to financial products documentation. Describe any ethical requirements.

Checking final copy

Describe the process for final document approval.

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The finish of a document or publication

A style guide should provide guidance on the following topics to ensure that the completed document is finished to a prescribed and consistent standard.

Colour/s
Discuss the appropriate use of colour, including colour pages/images (where, how often) and direction on the appropriate use of colour text. Also discuss the use of colour for cover pages.

Graphics
Describe the standard for design, such as fonts/styles for word-art, and quality or type of images or clip-art to be used on covers or in introductions.

Printing process
Describe the printing process to be followed; for example, outsource the annual report, but print letters, flyers and documents less than 100 pages in-house. List the preferred companies.

Copying
Describe what documents must be copied for stakeholders, which equipment to use and when.

Colour photocopying
Discuss whether the use of colour photocopying is appropriate and under what circumstances; for example, for internal documents only.

Print quality
Designate when in-house or external (commercial) printing is appropriate, what settings are required for text/graphics, and which IT equipment is to be used to achieve the desired print quality.

Page styles
Discuss use of headers and footers, page numbering and watermark printing.

Overall presentation
State whether the final print copy must be checked and/or approved for release, and by whom.

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Identify design tasks

Where documents are identified as a requirement but do not currently exist, you need to generate a specification or template for the design of a new document, using your existing standards where appropriate. You may need to discuss the design tasks with suitably creative or qualified personnel. It is also useful to consider any budgetary and resource constraints, particularly in terms of hours spent on design work. For example, is it economically viable to produce the documents in-house? This is particularly relevant with forms and contracts. Always consider different options in terms of any expensive IT purchases and ongoing running costs of ink, laser toner, paper, power and time.

Specific design tasks

In addition to complying with the organisation's style guide, those who produce documents need to carry out specific design tasks. Here are examples of tasks that may be undertaken within the documentation design stage.

Identifying client requirements for document design

Liaise with clients to ensure that the design and quality of the documents you provide them with meet their needs in terms of readability and function. This does not specifically relate to content.

Locating appropriate precedents

Factors other than software/hardware suitability must be addressed, and staff involved in document design must understand existing policy and procedures, current or draft style guides and any in-use software or hardware compatibility.

Using appropriate page layout software

Given the number of document (word processing) and page design software applications available, software must be selected that produces results in accordance with the specified organisational standards.

Applying macros to speed up production

Macro recording varies not only from application to application, but from version to version. For full instructions on how to record macros in your particular application, refer to its Help guide.

Liaising with external personnel

Make appropriate use of external sources of knowledge and expertise, in areas such as suitability of specific design software for proposed use or costs of external production versus internal document production.

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Seek external IT expertise

When performing tasks within the documentation design stage, an organisation may need to seek external expertise to assist and support the document development process or even to assist in training staff in the use of new software applications.

Expertise external to an organisation can include:

- IT manager/staff
- software developer trainers
- online tutors and tutorials
- short courses
- external consultants.

Obtain permissions or approvals for the standards

Once the style guide has been developed or updated, you may need to seek the approval of a director or senior managers. You may also have to produce draft versions of each of the proposed documents for their perusal and comment. This stage is important, particularly where changes have been made to long-standing corporate templates and where these affect external documents, as what you are producing will be a part of the company's external image.

Example: use different cover styles

This excerpt outlines different cover styles an organisation may choose to use.

Cover style	Application
Hardcover (colour or black and white)	Publishing quality books, organisational histories
Full colour or high-resolution black and white, on card front and back cover	Prospectus, sales advertising, contract tender, contract proposal, company presentations, annual reports to shareholders, reports to regulating authorities (for example, Australian Securities and Investments Commission)
Full colour on paper (colour print or photocopy)	Internal circulation of previous documents, draft documents (prospectus, proposals, etc.), organisational procedures or policy documents
Plastic cover over cover (colour or black and white)	Clear or opaque plastic covers for hard-wearing or continually accessed documents (internal manuals, procedures or reference documents)
Black and white on paper	Operating manuals, internal procedural manuals, reference documents or instructions
No cover page/s	Letters, memos, minutes, internal circulations, distributed minutes of meetings or photocopied documents

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Practice task 4

Research the following for your organisation, or one you are familiar with.

1. What impact do information requirements, budget and available technology have on document production?

2. Explain what you would tell a new staff member about the role of the organisation's style guide.

3. What is the organisation's policy on outsourcing document production?

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4. Briefly describe the existing organisational process for document production.

5. Write a brief entry for a style guide on one aspect of document production to set the standard for this area.

6. Research one of the following examples of document preparation guides and list any standard you think would be appropriate to include in your organisation's style guide:

   www.aphis.usda.gov/brs/pdf/Doc_Prep_Guidance.pdf

   www.publish.csiro.au/media/client/asstyleguide.pdf

Summary

1. Document control is employed to protect the organisation's brand or reputation by applying a common set of rules across all documents produced by the organisation.
2. Standards in design, finish and content of documents transmit a professional corporate image and enhance the organisation's brand.
3. The ability to produce documents of a specified quality and standard is dependent upon the organisation's computer software and hardware capacity.
4. You need to examine the types of documents generated within your department or business unit. With reference to the corporate business plan, you need to determine what documents are currently being produced and what may be required in the future.
5. Document standards are established for application across an organisation, dictating a common theme and design and allowing easier document production and transfer of information.
6. An organisational style guide is a quick and easy reference to the style required for all internal and external documents produced by the organisation.

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Learning checkpoint 1
Establish documentation standards

This learning checkpoint allows you to review your skills and knowledge in establishing documentation standards.

Part A

1. List five of the most important organisational policies and procedures that should be applied to document design and formatting.

2. What is the purpose of a document control process?

3. How does your organisation, or one you are familiar with, assess document quality? What criteria are used?

4. Why is it crucial for a manager to understand anti-discrimination, privacy and ethical principles in terms of document production? List strategies for ensuring documents comply with anti-discrimination, privacy and ethical principles.

5. What do you need to consider when establishing design tasks for document templates?

6. What skills does a manager need to have to carry out all the tasks necessary to establish documentation standards?

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7. Evaluate the adequacy of your existing IT structures and identify future needs. Write brief responses to the following questions:
   - What is the quality of the documents the organisation is producing now?
   - What quality of documents would the organisation like to be able to produce?
   - What software does the organisation have for use in document production? Is this appropriate and sufficient for your needs?
   - If you were unexpectedly allocated an extra $1,000 for documentation design and development, what would you spend it on and why?
   - Will the organisation be purchasing any new software in the near future? What will it be used for?
   - What IT hardware does the organisation have?
   - What software skills exist within the organisation?
   - What cost constraints are there?

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8. Describe the role played by a style guide. What may be the consequences of not having a style guide and document standards?

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Part B

Read the case study, then complete the tasks that follow.

Case study

The state manager for a large Australian charitable organisation has become aware of the vast array of communication and documentation being sent from its various offices that is unformatted, unstructured and, on occasion, unattractive and difficult to read or interpret.

To remedy the situation, he implements an organisational review of existing procedures and standards, only to find they are not accessed by staff and are nearly 10 years old. His goal for the review is to establish the viability of producing all the currently used documents in-house.

The organisation's requirements to produce a range of documents, particularly letters, and for the majority of these documents to go to potential donors and clients mean that document standards and templates need to be developed.

1. Describe the steps the manager should take next.

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2. What factors would the manager need to consider when assessing whether his goal is achievable?

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Topic 2
Manage template design and development

Designing high-quality templates and documents using dedicated document design software is not a skill expected of every manager. However, if document production lies within your area of responsibility, you need to develop an understanding of the design software's capabilities and limitations and have well-developed skills in using a range of software packages. You also need technological skills so you can either design templates yourself or delegate the task to others and oversee their work to ensure the template is suitable for the purpose and in line with organisational requirements.

A properly designed, tested and implemented standard format or set of templates increases productivity by saving time in rewrites; it also sets a positive, professional image of your department or business unit and the organisation as a whole.

In this topic you will learn how to:

2A Ensure standard formats and templates suit document requirements

2B Ensure templates enhance readability and appearance, and meet style and layout requirements

2C Test templates, obtain feedback and make necessary amendments

2A Ensure standard formats and templates suit document requirements

When developing standard formats or templates, you need to make sure they meet the purpose, audience and information requirements for each document.

Standard formats are designated styles that are defined by an organisation. Whereas templates can be seen as document 'skeletons' onto which the user applies the 'flesh' (content or information), formats can define when and where templates are used, as well as describing the actual content. For example, the organisational format for informing a client that their product is complete and ready for pickup may specify a single-page letter and whether the standard letter template can be used.

Templates are established style models used to increase efficiency in production and ensure consistency in design. They can be created using fields or blank areas for typing or entering data. Fields allow content to be entered into specific areas only, leaving the remainder of the document protected (or at least, unaltered) and pre-defined for conformity. When creating a template, make sure the format (tone, style, choice of language and layout) conforms to the type of document.

Comply with the document's purpose

The way that templates are structured and standard formats are described depends on the document's purpose. For example, there are many different types of letters, so each one may need its own template; a covering letter to a potential client will not have the same tone or layout as a letter of demand to a debtor. It is possible to have just one or two templates that can suit several letter types by using additional functionality such as macros. Several different macros can be recorded to perform setup, format, layout and predefined text addition according to the requirements of the different users.

Identify the various documents you need to produce and ensure there is a template or standard format outlined in the style guide for each one.

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A basic template for staff meeting minutes, but a more complex format for a board meeting

Different standard letters for an inquiry, unsuccessful candidates, overdue payments, customer rewards, etc.

Templates or standard formats for regular items such as reports, faxes, labels, promotional material and briefing papers

Different formats for emails to external and internal recipients

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Know your audience

In order for a document to be effective, a writer needs to understand their audience and write appropriately for them. They need to identify who will be reading the document and why they will read it. For example, an invitation to staff is less formal than an invitation to a dinner for board members. Your audience may include staff, colleagues, customers, clients, suppliers, business associates or industry organisations. The purpose of organisational documents may be to inform, instruct, invite, remind, promote or warn.

Here are several tips to help you write effective templates.

Do not include unnecessary jargon

In all instances, use clear and concise language while avoiding overly large words or superfluous information.

Ensure an appropriate tone

A firm tone may suit a letter of demand, but is inappropriate for an introductory letter to a potential client. Similarly, some organisations may want to convey a contemporary image whereas others use a traditional style. Tone can be subjective, so it is advisable to have someone else proofread any preformatted or standard text you have prepared to ensure that it reads as you have intended.

Consult with users prior to finalising formats and templates

Aim to ensure they comply with what the users want and require. Within your department or business unit, you may have several different letter formats, two or three different types of tax invoices you need to issue and several other limited-use documents types for specific audiences.

Understand information requirements of templates

Part of the process of developing standards and templates is ensuring they suit the information they intend to communicate. The writer needs to be able to identify the text that is required for the template or is specified in standard formats, and whether it is appropriate information for all situations in which the document will be used. This relates to pre-inserted text, plus any standard inclusions that are integral to the specific document, such as legal disclaimers or regulatory requirements. For example, a standard letter template from a bank may include a final paragraph referring the customer to contact a specific number if they have any questions about the content of the letter, which may not be appropriate for specific customers or under certain circumstances.

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Example: well-constructed templates

The manager of a real estate company recently reviewed templates for all the documents the company produced. She found that some of them did not accurately convey the organisation's image. When she reviewed a welcome letter to new contractors, she found the following:

> Dear Sir/Madam,
> Thank you for your tender. You have been successful; welcome to the team. Contact Mr. Rob Forrester with regard to your contract signing.
>
> K. Rossmoyne
> HR – Recruitment

The manager realised that the template had not been proofread or approved. It met the information requirements of the audience (sub-contractors), but the purpose was not just to inform but also to build a relationship with a sub-contractor that fosters trust and a good business relationship. This letter was too brief and lacked any warmth. The template should also have had provision for the person's name (not just Sir/Madam) and included a professional sign-off such as, 'Looking forward to meeting you again', or 'Yours sincerely'.

The manager asked the new HR manager to reassess all correspondence for audience, purpose and information suitability and ensure appropriate templates were prepared.

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Practice task 5

Source four templates currently in use at your organisation, or one you are familiar with, and consider the styles and context in which they are to be used. In **this table**, note what purpose the templates are used for and describe how the tone of the text relates to the purpose. Explain the information requirements of the intended audience and how the documents meet those requirements. An example has been provided in the first row.

Template	Purpose	Audience	Information requirements	Tone and style
Leave form	Request, document and authorise application	• Manager • HR • Staff applicant	• Proposed leave dates and total time • Type of leave • Signatures • Evidence of processing by accounts	• Impersonal, brief, clear, simple. • Document includes all requirements. • Easy for staff with different levels of literacy to fill out.

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2B Ensure templates enhance readability and appearance, and meet style and layout requirements

Text that is easy to read improves comprehension, retention and reading speed. While syntax and semantics (the choice of words and how they are used) are crucial, readability can also be affected by a range of layout design features. Using these style features appropriately in line with the document's needs, organisational standards and client requirements will provide maximum visual impact as well as enhance readability. The prepared templates and standards must be visually appealing and readable for the intended audience while remaining within your organisational guidelines. Most organisations have an established corporate image that they wish to maintain throughout their communications or interactions with the community. This established brand must be reflected in the organisation's written and electronic materials.

Layout features

The layout of the document has a major impact on its readability and overall value as a communication device. Here are several factors that need to be considered when designing a template.

Choice of font or typeface	The organisation may have a preferred font and size, depending on the type of document. For example, business letters are often written in Times New Roman or Arial in 11 or 12 point font as they look professional and are easy to read. Some fonts are very fancy and may be difficult to read. Keep to one or two font styles only as too many types of font can be distracting. Never use capitals for all text as this looks aggressive and is more difficult to read. Some text may need to be italicised or bolded for emphasis.
Text spacing	You need to be familiar with the term 'white space', which refers to the amount of space surrounding text. Too much white space and the document may look sparse and take up too much paper, whereas too little and the document may look cramped and be difficult to read. There may be a requirement outlining the number of lines between the text; for example, the template for a letter will indicate the required space from the letterhead to the address line and the number of lines from the address line to the greeting. You may need to leave double or multiple spaces between paragraphs.
Margin width	Find out what margin size is required; for example, the template may require the left margin to be 4 cm from the edge of the paper, while the right margin only needs to be 1 cm, in accordance with any organisational policy or style guide.

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Justifying text	There are rules regarding whether you should justify the text (making each line end neatly at the same point) or not (having the end of each line 'ragged' by finishing up where the word naturally ends). Generally, justification is not suited to most types of business documents. Many people find it very difficult to skim pages with justified type.

Design elements

The design elements of the document have a major impact on its overall value as a communication device. Here are several design elements that need to be considered when designing a template.

Colour choice	Check whether the organisation has a corporate colour scheme that needs to be used for the logo, fonts and paper. If you are developing a new template and there are no colour requirements, avoid using strongly contrasting colours. If you need more than one colour, keep the colours muted or use them sparingly. You do not want your business letter to look like a children's party invitation. Consider whether staff members have access to colour printers or whether most documents will be printed on a black-and-white printer. Consider readability and avoid pale font colours such as yellow, which may disappear on a white background.
Backgrounds	A watermark, or faded underlying impression or picture, can be visually effective, but must not detract from the readability. This happens if the watermark is too colourful or intricate, or not opaque (softened or faded) enough. Check whether a watermark is required in a template.
Use of a header or footer	In some cases, a template may include a header that incorporates the organisation's logo and contact details. A footer that details the organisation's name and provision for the date, document title and file name may be required. Generally these are in smaller font than the text in the document itself.
Document sign-off and signature blocks	There might be prescribed wording for the sign-off included in the template as well as a set number of lines allocated to the space for the signature.
Use of logos	Many templates include the company's logo in the correct size, colour and position as a letterhead. Others include logos after signature blocks, such as in corporate emails.

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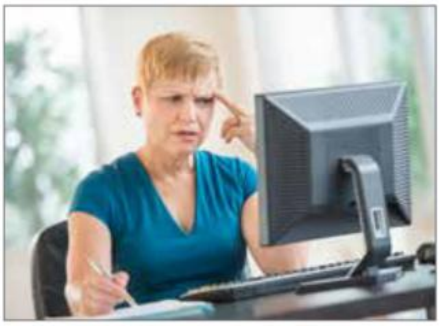
Example: renew organisational templates



A large mining equipment organisation with offices in Sydney, Melbourne and Darwin recently undertook a review of all their existing documentation to determine its currency and validity. The Australian operations manager implemented a project to redesign many of the templates that were used for internal and external purposes, as many existing templates were hastily re-worked versions from the organisation's international headquarters in London, and therefore didn't always suit the style or context of the Australian business environment.

In researching the requirements, the Operations Manager identified several areas that the design team needed to address, particularly in the fields of template formatted (prescribed) text and with the 'Australianisation' of the underlying designs.

The design team was directed to check that all document standards and templates complied with local (Australian) legal and regulatory requirements, while the manager assessed the content for suitability of purpose and general readability, taking into account the audience for much of the company documentation is miners and mine managers.

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Practice task 6

1. Using the four templates you reviewed in practice task 5, describe how each template enhances readability and whether it meets the organisational standard for layout and design. Record your response in this table.

Document	Readability	Meets organisational requirement for layout and design	
1		❑ font ❑ margins ❑ header and footer ❑ signature block ❑ colour ❑ background	❑ logos ❑ spacing ❑ justification ❑ other (please specify)
2		❑ font ❑ margins ❑ header and footer ❑ signature block ❑ colour ❑ background	❑ logos ❑ spacing ❑ justification ❑ other (please specify)

continued ...

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... continued

Document	Readability	Meets organisational requirement for layout and design	
3		❑ font ❑ margins ❑ header and footer ❑ signature block ❑ colour ❑ background	❑ logos ❑ spacing ❑ justification ❑ other (please specify)
4		❑ font ❑ margins ❑ header and footer ❑ signature block ❑ colour ❑ background	❑ logos ❑ spacing ❑ justification ❑ other (please specify)

2. Prepare a checklist you can give to a staff member who is creating a new template to ensure it conforms with organisational requirements for layout, style and readability.

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2C Test templates, obtain feedback and make necessary amendments

New templates should be tested with your users to ensure they meet staff requirements, present well and can be used efficiently. It is often the case that in designing templates you build a model that suits the majority of users, but there are often niche users for whom you may need to alter existing templates or build new ones. Feedback is important as it helps you determine how useful the templates are, and what you can do to increase usability.

When a template is developed, the creator should test the individual elements and macros (if any) to ensure they work. However, a true test of a document template can only be conducted when it is used to produce that document. Select a staff member from the appropriate area to test the template by creating a simple document. If the template works as expected, it is time to offer it to a wider range of users for feedback and critique.

Obtain feedback

There are many ways to assess the value of a template, style guide or format, but the easiest and most reliable is by employing a test and feedback process. This does not have to be a formal process; it can consist of verbal feedback or written suggestions gained via a range of techniques. In all cases, give the person a guide as to the type of feedback you require so they know what they are looking for when they use the template. Feedback of 'It's great!' or 'It's terrible!' is not specific enough. Whatever your feedback media, you must encourage respondents to include constructive criticism or suggestions for improvement.

Here are several methods that can be used to obtain feedback.

Focus groups

Select a group of users from different business units and seek the approval of their supervisors/managers to test the templates applicable to their area. Seek direct feedback from these users.

One-on-one interviews

Distribute the templates or style guides widely and give people time to use them. Then ask users to provide suggestions for improvement via one-on-one interviews.

Group feedback sessions

Seek feedback by holding a group meeting or forum. These sessions have the benefit of avoiding repetition and allowing users to hear the suggestions of others, which can generate extended ideas and options.

Intranet feedback

Make use of the organisation's intranet. Ask staff to respond to a checklist or feedback guide by checking boxes or writing comments.

Suggestion boxes

Some organisations use suggestions boxes successfully by collecting suggestions on a regular basis and following up the feedback and suggestions given. You can invite feedback at a staff meeting or provide a feedback sheet for staff. It is a good idea to follow any feedback up with the respondent, particularly if they have offered improvements or their feedback is unclear.

Make amendments

You may need to modify a template to incorporate user feedback. Always save the new template with the date and a clear version name or number. Save it in the appropriate template format (.dot or .dotx for Microsoft Word templates).

Whenever you produce a template for a document, always make a backup in case the original or user-access document is lost, corrupted or deleted. If you need to make amendments to the original template, you also need to do the same to the backup. Version control is very important to ensure all templates are current and staff know which ones to use.

Consult external sources of expertise on this topic if necessary. A visual guide to version control can be found at: betterexplained.com/articles/a-visual-guide-to-version-control.

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Example: test and evaluate new templates

Here are two examples of when you may need to test and evaluate new templates.

A manager's experience

A manager at a national accounting firm discusses an experience of testing and evaluating new templates:

'We introduced a whole raft of new templates when the company changed across from Microsoft Office 2007 to Office 2013, and had to do training for some of the staff'.

'Rather than transfer legacy macros, we decided to use the opportunity to re-develop and update our Word and Excel spreadsheet macros in the process of changing across to the new Office suite. This was challenging but quite rewarding, as all staff had the opportunity to learn as they went with Office 2013'.

'Once we had completed the new templates, John, one of our office supervisors, organised a collaborative distribution and field test to targeted users to ensure the templates functioned as planned. He put together an email for some feedback and suggestions and sent them out.

'We put a lot of time into the development, but you know there are always things we overlook, or underestimate the impact of. The feedback suggested that the templates worked as planned overall, with the inbuilt macros and such. John did receive some negative feedback from the Adelaide office regarding one macro that automatically inserted the head office address in Sydney for postal correspondence, but we explained that this is where we want all correspondence to go.

'We did get some good suggestions, including some appropriate locally developed macros that we decided to incorporate in the final published version for all users nationwide. Overall the evaluation loop worked very well, and the templates we have now (with their associated macros) work brilliantly.'

Off-site testing

Jim is the new South-East Queensland regional manager for a national retail tyre and mechanical franchise and has taken on the responsibility of updating the company's documentation standards and templates. He has identified the need to develop several new templates for staff, particularly for letters to former customers regarding free services that are being offered as part of a national marketing campaign.

The office staff at the regional headquarters start creating a number of templates, including macros and pre-formatted text in some cases, to meet the identified requirements. Jim oversees the project and, with junior managers or staff from the appropriate areas, ensures each document template or standard is suited to the requirements of the intended audience in terms of content and tone. He then has the same staff members assess each standard and template against the style guide (for layout and appearance) provided by the national office.

As most of the office staff have been involved in the production of the templates, Jim finds that he cannot conduct an unbiased test on the templates and standards, but does not want to roll them out to users until they have been comprehensively tested.

To test the templates, Jim arranges with the manager of another regional office to have appropriate staff members road-test the new templates, macros and standards and provide his staff with feedback. This proves highly successful and allows for the new templates to be rolled out within two weeks of the process commencing.

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Practice task 7

Choose a template you or a staff member has created and you think may need updating. Approach a member of your team, a manager or a senior staff member and ask them to provide feedback on the template regarding its usability and functionality. Amend the template if it is warranted and within your scope of responsibility. If you are not able to amend the template now, make notes on what changes you would make and how you would proceed.

Summary

1. By understanding your audience, the information they require and the concept of reading styles, you can determine whether your templates and standard formats are suited to their intended purpose.
2. Be aware of the tone of any text you intend to include and ensure it is suited to the intended audience.
3. Readability identifies how easy a document is to read. A template should be designed that takes into account the correct use of fonts, white space, colour and other layout elements that will enhance the completed document and convey the organisation's image.
4. Do not over-design business documents with excessive colour, text or font types.
5. Have a member of your staff or a group of testers use your templates for a defined period and provide feedback and recommendations, before making them widely available to the organisation.

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Learning checkpoint 2
Manage template design and development

This learning checkpoint allows you to review your skills and knowledge in managing template design and development.

Part A

1. Define what is meant by the tone of a business document. How can the tone be incorporated into a template?

2. Describe what is meant by the term 'readability' in reference to business documents.

3. How can you determine the functionality (usefulness) of the macros that have been developed?

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4. Imagine you have a new team member and you have asked them to create a new template for a business document. Explain the steps you would follow to manage this task.

Part B

Read the case study, then answer the questions that follow.

Case study

The new contract manager at a large mining company has four major contract forms that require templates, so she organises staff to complete the project. Templates are to be built using existing modified contracts, and need to include formatted text and macros to speed up document production time.

Upon completion, staff members are told to swap templates to check and ensure they meet both organisational and audience requirements. These requirements include readability, tone, appearance, layout and style in accordance with company policies and guides.

The templates are then sent to the mining offices for staff to test on a one-month trial, with feedback requested from both users and managers, and comments directed back to the contract manager in Sydney for evaluation and amendments as required.

1. What general factors would staff need to consider when determining whether the format or template is 'fit for purpose'?

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2. How could the templates be tested for readability and appearance, other than by approaching staff members (the template users)?

3. What problems may be encountered if the staff members simply swap the templates to check compatibility?

4. What other ways could user testing and feedback be conducted?

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Topic 3
Develop standard text for documents

To ensure consistency and a standard organisational style, standard text should be used in documents. In many instances, text can be prepared in a template or as a macro and its inclusion automated to significantly speed up the entire document production process.

Contemporary word processing, spreadsheet and desktop publishing software has powerful functionality that can manipulate (import, export, merge and sort) data automatically through a mouse-click in an application. Many software packages also allow the user to build their own macro functions to automate the process further.

In this topic you will learn how to:

3A Evaluate software functions for their usefulness in automating document production

3B Match document requirements with software functions

3C Test macros to ensure they meet document requirements

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3A Evaluate software functions for their usefulness in automating document production

Word processing applications such as Microsoft Word, Open Office Writer or Apple Pages offer many features for the user beyond simple word processing tasks. These functions can be harnessed by basic users through the addition of macros or other automated processes.

You will be expected to have a working knowledge of the complex technical functions of software from a user's perspective, not necessarily from the programming side, and be able to evaluate the functions for their usefulness in producing documents and templates.

Formatting software

Most managers will have a working knowledge of formatting software functions but may not have thought about their usefulness, which lies in reducing formatting time.

The following functions are readily used by most staff who use word processing packages. They speed up document production by predefining an aspect of layout, format or content. They all improve a document's usefulness by reducing the formatting time required and creating a consistent format automatically. Headers and footers further add to a document's usefulness by making the file path traceable and tables summarise data effectively.

Functions and how they speed up production:

- Margins and fonts predefine these aspects of layout for a writer
- Page/section breaks predefine layout
- Headers/footers/footnotes predefine content
- Bullets and numbering predefine format
- Tables predefine format

Understand complex technical functions

Functions such as embedding, macros, linking and importing can speed up document production as they can be automatically generated. Managers may need to advise team members to use them and need to know what the function does, how it can benefit document production, when a person would need to use it to automate document production and where staff can go to improve their knowledge and expertise.

It may be necessary for a manager to undertake a course on the software from the provider, or refer to an information technology manager or relevant technical manuals to develop a working knowledge of some complex technical functions.

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Some of these functions are described here.

Form field

How it speeds up production:

- Limits data entry requirements
- Verifies data entry
- Formats data

How it improves usefulness:

- Verifies data entry
- Creates consistent format

Macro

How it speeds up production:

- Automates repetitive tasks

How it improves usefulness:

- Reduces time required
- Reduces associated errors

Merge criteria

How it speeds up production:

- Defines criteria for merging documents
- Avoids duplicating documents

How it improves usefulness:

- Reduces time for merging
- Reduces associated errors

Link

How it speeds up production:

- Avoids duplicating documents

How it improves usefulness:

- Reduces errors from cutting and pasting
- Reduces time for linking documents

Index

How it speeds up production:

- Predefines key words or criteria for indexing

How it improves usefulness:

- Facilitates searches within documents

Embedding

How it speeds up production:

- Predefines placement of embedded images

How it improves usefulness:

- Reduces formatting time
- Creates consistent format

Exporting/importing

How it speeds up production:

- Avoids duplicating data
- Reduces time to populate documents
- Automates extraction of data

How it improves usefulness:

- Pushes/pulls data between documents
- Reduces associated errors

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Data transfer

Data transfer is the physical manipulation and transfer of data between documents and/or databases. It covers any importing and exporting of text or data, manually or automatically. It allows large volumes of text to be 'cut and pasted' between documents to accelerate production. Data transfer is used where large portions of text or fields of a spreadsheet are common across several documents, but required in different areas of the document; for example, where a single template cannot be used to cover various needs.

Here is further information about the importance of exporting and importing data.

Exporting	Importing
Exporting is the process of 'pushing' data from one document to another, or to a database. It can be an automated process, depending upon the application used. Exporting speeds up document production by allowing accurate transcription of information at the click of a button. Ideally, it is used for pushing results of calculations from spreadsheet documents to fields in budget spreadsheets, databases or quote documents (word processing documents).	Importing is the process of 'pulling' data to a document from another document or a database. It is the opposite of exporting. Importing can be an automated process, depending upon the application used, and speeds up document production by allowing a user to call upon previously created data or information and 'drop' it into the current document. Ideally, importing is used for retrieving results of calculations from spreadsheet documents or databases into fields in budget spreadsheets or other word processing documents.

Display features and embedding

Display features dictate how the document is presented in the software during development. Different applications offer different views when developing documents, templates and macros that can affect the final layout of the page. They are applicable to all document development applications, including graphics, word processing, spreadsheet and database viewing software. A manager should direct developers and/or users to view documents in a specific format; for example, 'Developers and users need to view this Word template in "Print View" with margins, with macros selected'.

Embedding information is the process of inserting formulas, pictures or text blocks into a document to automate production. It is used in templates to lockin corporate logo images or letterheads, watermarks and pre-defined text, or to define fields and form fields and assign formula to fields in spreadsheets. Embedding is prevalent in web-based documents (such as web pages) to incorporate video or audio (multimedia) files.

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Fields and form fields

Fields are assigned areas where text or numbers can be entered into a template or locked document (documents that can be modified and printed, but not saved). They are most commonly seen in spreadsheets, where they are ideal for keeping tabulated information and as basic databases. Fields can be sorted; for example, alphabetically, numerically, by date or by user-defined criteria and information extracted or exported to word processing documents. Fields are useful for online forms such as customer feedback or contact, and can be developed in Word, Writer, Adobe Acrobat and other popular applications.

A form field is a defined-length space in a document or form that requires user data entry. Most spreadsheet applications offer fill-in field or form-field capability. Developers can set a field with a name or value that the user then simply populates, and from which a document can be generated. Form fields differ from general fields in that they often have formulas embedded that define what content is required (generally not free-flowing text). Form fields allow the creator to specify content type and length. For example; 'field 3 must contain a telephone number of 10 digits and no letters'.

Formulas

Formulas are mathematic functions that allow users to manipulate field data to calculate totals, interest, depreciation and functions in areas such as:

- logical functions
- time and date functions
- finance calculations
- look-up and reference functions
- mathematics and trigonometry calculations
- statistical functions.

Formulas are not necessarily mathematical in application; for example, Microsoft Excel has a number of text formulas that manipulate text and perform functions such as identifying the correct number of digits in telephone numbers entered in fields, searching for text strings (groups of words) or substituting text. Formulas can be embedded to allow certain functions to be automated. For example, adding a 'sum' function can automate an invoice total and GST calculation after a staff member has entered billable line items.

Indexes

Indexing extracts content from files and constructs an indexed catalogue to facilitate efficient and rapid searching. Indexing can be performed by the operating system and by more advanced document production software (such as Adobe's Acrobat Pro). Using indexing allows for the cataloguing and searching of the contents of specific file types, searching documents by keywords, phrases, dates/times and other production variables for quick reference. Most operating system search tools do not search the contents of documents, only file names or date/time data.

Macros

A macro is a shortcut button that can be added to a toolbar or a keyboard command that allows you to automate anything from a basic mathematical function to a complex set of instructions for selecting, importing, merging or otherwise manipulating text from other documents, while applying other functions across a large section of text.

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Macros are basically keystroke recorders – that is, they record a user's mouse movements, clicks, keystrokes and function keys and package them under a user-defined menu button or hot-key (for example, Ctrl-Shift-'F') combination. This allows slow, repetitive or keystroke-intensive tasks that are commonly used to be recorded once and used again at the click of a button (or keystroke). An example is the re-formatting of data from an external customer or supplier to populate a local database. The process of selecting the row and adjusting the font/layout/data display can be completed once while macro record is 'on'. On the next occasion, the user simply opens the data and selects the macro button.

Make changes to a document

Merging allows word processing and data entry to be sped up through the method of updating information that it involves. Linking is adding one document into another. It varies from merging in that it simply adds one document and does not update changed information.

Here are examples of tasks undertaken when making changes to documents.

Linking

Linking is useful when working in a document that needs to pull information from one or several other documents; for example, the standard clauses contained in a contract may be stored in other documents, and then be pulled into the contract as necessary. Linking saves time and effort finding documents manually and cutting and pasting information in, or manually entering large blocks of text.

Sort criteria

Sorting is used in spreadsheet manipulation or when extracting information, whether from databases or spreadsheets, into other documents. It is as simple as it sounds – setting criteria by which to sort information. Setting accurate sort criteria allows for more precise extraction of data (including text strings, blocks of text, values, whole documents or groups of documents), whether from within a single document or an entire database. An example is setting sort criteria by date in a spreadsheet to determine the most recent invoice issued to a client or payment to a creditor, which then can be used in another document.

Merge criteria

Merge criteria is similar to sort criteria, in that it sets the rules for merging documents. Criteria (rules) are set by the developer or user for specific data recall during the merge process, creating a version control document. This is achieved because by merging, common data is not overwritten (unless that is a specific criterion) and where there is a data conflict, the user has control over which content to keep or discard. Criteria can include data type, date/time information, last updated information and file size. Merge criteria can speed up production by allowing multiple users to work collaboratively on a single document and then merge results. This allows individual business units to prepare their own documents for local use, while the data in these documents can be merged into larger organisational documents.

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Table of contents

In electronic (word processor) form, a table of contents allows for quick navigation to various parts of multi-page documents using hot keys. In hard copy, it allows readers to find relevant sections of a document. Generally, a table of contents is not used in documents of less than 10 pages. A table of contents can speed up document revision. When sections are updated, referenced or modified, tables of contents allow editors or reviewers to find and replace sections quickly.

Other functions

From time to time, other functions may be useful in automating aspects of standard document production. The following lists a range of these functions. These are available using Microsoft Word, Pages and Writer, unless otherwise stated. An asterisk denotes that a function is available in Microsoft Word 2013, but may not be available in earlier versions or in Apple iWorks Pages.

Simple

- Insert columns
- Insert tables
- Justify
- Background fill
- Text colour
- Page breaks
- Set margins
- Set paragraphs
- Themes
- Indexing
- Indentation

Intermediate

- Hyperlinks
- Footnotes/endnotes
- Section breaks
- Macro recording*
- Digital signature protection
- Synchronise
- Document protection
- Watermarks
- Page orientation
- Templates
- Format conversion
- Table of contents
- Smart art graphics*
- Co-authoring

Advanced

- Document encryption*
- Tracking changes
- Document comments
- Balloons
- Add-ins*
- Developer tools
- Document merging
- Citation styles*
- Document signing (security)

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Efficiencies gained from other functions

Organisations' documentation requirements will vary. A software function may be highly useful in one place but not used elsewhere. Most organisations have a need for letter templates, however, and a manager should seek to be informed about functions that may automate and speed up the production of letter documents. Here is a list of functions and the ways in which they may be useful.

Developer tools

Allow users to develop sophisticated programs within a software application; for example, scheduling letters to run automatically

Document protection

- Protects documents from unauthorised access
- May be used to protect sections of the document from being altered by general users
- Allows for data entry in unprotected cells within spreadsheets

Section breaks

Allow for different styles to be used within different sections (headers/footers, page orientation, page numbers, etc.)

Document comments

- Provide additional information about elements of the document
- May provide additional information to users of a template, but be concealed when letters are printed

Signature protection

- Identifies whether users have reviewed or approved a document
- Digital signature protection allows users to sign documents electronically, ensuring document integrity for other users

Header/footer

Inserts common information on each page or specified pages without re-entering data; for example, date created, page numbers or file paths

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Example: improve templates

When creating a database for a small mortgage brokerage, Alan reviews his options. He is familiar with MS Excel and believes most of the functionality within the software can meet the business's needs. These included basic and complex financial calculations, data look-up and referencing for customer information, and presentation of charts and reports for his customers.

He studies online tutorials and attends an advanced workshop to improve his skills. He is able to manipulate a spreadsheet workbook to include all the required functionality (and more) within just a few days, with the help of macros and multiple inserted formulas throughout the various pages. To ensure the process can be followed by his two staff members, he also creates a flow chart of actions and effects.

Practice task 8

1. Select an intermediate or advanced software function and explain which tasks you would use it for. Check your understanding with a person who has expertise in word processing functions.

2. Describe the function's usefulness in speeding up document production.

3. How does using this function benefit the document?

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3B Match document requirements with software functions

Not every document requires macros, detailed tables or hyperlinks to make it easier to use or faster to produce. There are several simpler functions that can be accessed through similar interfaces for preparing a basic business document template, such as linking or merging. Your role as manager is to assess both the complex and the more-basic functions and see whether they suit your document design. You need to identify the type of document being prepared and determine the appropriate software function required to create the document in the most efficient way.

Prepare documents efficiently

To correctly match the document with software functions, you must be able to assess the document's requirements accurately. For example, letters may have different requirements depending on the recipients, in terms of formatted text inclusions, whether mail merging can be used or if form fields can be applied. Many software functions are common to all documents. Make sure you and your team members are familiar with common functions and how to use them. You may need to explain specific terms; for example, indexing in computer document terminology is different to creating 'an index' for a book; it refers to marking key words in documents to enable speedy software searches of documents for data retrieval.

Letters and business emails

The following suggests software functions that can be used to meet letter and email requirements automatically.

Business letter

Requirements:

- Formatted text
- Fill-in area for free-flow text
- Embedded graphics/text, link-in text from other documents
- Prescribed font styles and formatting

Software functions:

- Form fields
- Macros
- Margins
- Format and fonts
- Page/section break
- Date/time
- Header/footer/footnote
- Bullets/numbering
- Print layout
- Insert, cut/paste
- Merge
- Link
- Index
- Embedding

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Mail merge letter

Requirements:

- Multiple addressees
- Fill-in area for free-flow text
- Formatted text
- Embedded graphics/text; link-in text from other documents
- Font styles and specified formatting

Software functions:

- Form fields
- Macros
- Margins
- Format and fonts
- Ruler
- Table
- Page/section break
- Date/time
- Header/footer
- Symbol
- Bullets/numbering
- Print layout
- Insert, cut/paste
- Merge
- Link
- Embedding

Business email

Requirements:

- Formatted text
- Embedded graphics/text
- Link-in text from other documents
- Prescribed font styles and formatting
- Address block

Software functions:

- Form fields
- Macros
- Format and fonts
- Print layout
- Attachments
- Merge
- Document encryption

Spreadsheets

Spreadsheets have largely replaced paper-based accounting calculations in organisations, and have multiple uses. These powerful software programs can be used to display, store, arrange and manipulate data. It is essential to know how to use spreadsheets to fulfil the requirements of roles that involve data analysis.

One spreadsheet function that many organisations make use of is a 'look up' function, which searches for data within one spreadsheet and returns it to another. It may be used to provide the address for a customer; for example, 'Vlookup' looks for a value in the leftmost corner of a table then returns a value in the same row from the column specified.

The following suggests software functions that can be used to meet spreadsheet requirements automatically.

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Requirements	Software functions
• Importing/inputting data • Exporting results to databases and other documents • Perform calculations • Sorting columns • Multiple sheets • Transferring data between sheets, running formulas and automating actions	• Fields • Form fields • Macros • Embedding • Filters • Formula, exporting/importing • Sorting (sort criteria) • Merge • Data transfer (to/from database)

Webpages

Webpages are often developed externally, but staff commissioning or maintaining an organisation's webpage should be acquainted with the organisational requirements and be able to discuss relevant functions.

Here is an example of the requirements and software functions needed to develop a webpage.

Requirements	Software functions
• Content • Contact details • Images • Animation/multimedia • Feedback pages • Calculators • Email tool • Web commerce portal	• Fields • Form fields • Embedding • Filters • Formula • Exporting/importing • Merge • Data transfer (to/from databases) • Signing/locking documents (security) • Document encryption

Databases

Common uses for databases include being a repository for customer contact details and order history, and managing multi-step ordering. An organisation that needs to establish or maintain databases will need to be able to retrieve data, write data, update fields, add new data files and merge data.

Functions that can be used to implement database actions include:

- indexing
- sorting (sort criteria)
- form fields
- filter
- merge
- linking
- embedding
- exporting/importing
- data transferring
- locking documents (security).

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Forms and invoices

Creating form templates can be more challenging if the intention is to have customers fill out forms digitally, and internal or external support may be required in order to do this.

Basic invoices can be created using word processing or spreadsheet software. There are many examples to view online that can be adapted.

The following provides more information for some common organisational forms.

Invoice

Requirements:

- Fill-in form
- Formatted text
- Retrieve account information from database
- Perform calculations

Software functions:

- Fields
- Form fields
- Macros
- Embedding
- Filters
- Formula
- Exporting/importing
- Merge
- Data transfer (to/from database)

Fax

Requirements:

- Formatted text
- Fill-in area for free-flow text
- Link-in text from other documents
- Prescribed font styles and formatting
- Address block

Software functions:

- Form fields
- Macros
- Page/print layout
- Format and fonts

Accident report form

Requirements:

- Fill-in form
- Formatted text

Software functions:

- Form fields
- Cut/paste
- Exporting/importing
- Data transfer (to/from database)

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Newsletters

Whether newsletters are produced annually or more frequently, setting up a newsletter template will serve as a quality control measure, contribute to a consistent look and save time in the future. Here is an example of the requirements and software functions needed to develop a newsletter.

Requirements	Software functions
• Formatted text • Fill-in area for free-flow text • Embedded graphics/text • Link-in text from other documents • Font styles and formatting • Table of contents	• Form fields • Macros • Margins • Format; fonts • Page/section break • Bullets/numbering • Page/print layout • Cut/paste • Merge, link, embedding

Example: evaluate software

A large Australian government department needs a template from which staff members travelling on business can generate travel budgets. The accounts manager examines the options available in the current word processing software the organisation uses, in this case Microsoft Word. She finds that the software does not provide support for mathematical calculations of travel expenses. In addition, there are few options for filling in forms for automated calculation or field generation, items that are needed to produce estimates for travel allowances based on daily rates, meal allowances and accommodation expenses.

As the document is required in a hard-copy format for approval by managers (signatures), the chosen software will have to be able to be formatted and printed to an A4 form.

The manager examines the functionality of Microsoft Excel and finds it offers the best fit to the organisation's requirements. Fields are definable for formats of data entry by the form user, and automated functions (macros) can produce calculated totals for expense estimates. Multiple sheets can be exported and imported between each other, allowing for a summary front page to be generated for approval.

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Practice task 9

1. Source a current document such as a business letter or invoice. Using your organisational word processing software, identify the document's layout and requirements and the software features that may have been used to produce the document.

2. If the software has other features or functionality that may be applied, what could you add to the existing document?

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3C Test macros to ensure they meet document requirements

Macros need to be checked during their development. Once they are in place, their compliance and functionality should be monitored as external and internal changes may mean they need to be amended.

Questions to ask when testing macros can include:

- Does the macro save time?
- Is it a function that needs to be repeated often?
- Does it meet the users' needs?
- Does the function it performs comply with organisational standards?

Test macros

When they are initially developed, macros should be checked as part of the development loop to ensure they are valid and current prior to release to staff. Creating a macro can be like creating a document, with current styling and formatting requirements being checked at the start of the process. Developers in the process conduct first checks, then managers or others with more intimate knowledge of the document requirements should check them prior to general release.

Macros developed for common, repetitive tasks will be tested for functionality by the users who quickly begin to use them and testing by developers should be simply a formality to check that style and font specifications are maintained.

Problems can develop with macros that are used for less common functions; for example, inserting a clause into a contract that applies to less than five percent of clients. Staff update and implement changes in frequently used macros; less-common macros can inadvertently be overlooked. For these less commonly used macros, more care must be taken by managers to revisit them to ensure that when they are applied, they are still valid and current in their function.

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Test for functionality

Once a macro is in place within a document, test it to find out if it performs the same function in different contexts. For instance, will the macro work on the desktop of a co-worker or someone external to the organisation?

Here are questions that can be posed when testing for functionality.

Testing for functionality
• Are all users likely to be running the same operating system and the same or later versions of that operating system, i.e. is the 'SOE' the same? • Is the application the same version across all users? For example, if macros are produced for Office 2010, are all users using at least Office 2010? • Is the macro embedded so that it will work despite the operating environment? • Will the functionality always produce the same results? • Is there likely to be any antivirus interference?

Test for compliance

As well as being functional, a macro needs to comply with organisational standards such as those set out in an organisation's privacy policy and in legislation such as the *Privacy Act 1988* (Cth).

When checking for compliance, ask yourself the following questions:

- Does the macro look up (import or retrieve) data from a secure folder, such as a password-protected location or zipped file?
- Does it allow for anyone to access personal information, or is it password protected?
- Does commercially sensitive information exist within the function the macro carries out? If so, what effect might this have on corporate security?

Deal with difficulties

Sometimes macros do not work as expected and knowing reasons why this might be the case can allow decisions to be made more promptly and effectively. Here are several common difficulties that can occur when dealing with macros.

Incorrect pathways

Pathways to referenced files are not correct

A very common problem is when the developer links to a file but the pathway to that file has changed. For example, your macro calls for a block of text to be inserted from the file 'index.doc' stored at H:\Admin\Files\index.doc. This works fine in testing, but then the file is moved to H:\Admin\Files\Reference\index.doc, so the link in the macro will no longer work.

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File name changes	**Reference file names may have been changed** Changing file names can make the reference file difficult to find, for example when the file 'index.doc' has inadvertently been changed to 'index1.doc.'
Version conflict	**Version conflict** There may be a version conflict where the user has an older version of the application for which the macro has been developed.
User actions	**Individual actions can disable macros** Someone may have modified the version; for example, if a user has 'personalised' toolbars on their version of Microsoft Word and added or removed menu items, the macro may not be able to complete a function, causing it to stop.
Macros not enabled	**Macros not enabled** Macros imported from the internet can be the cause of virus infections on systems, so IT departments in large organisations often disable the use of macros across entire networks by default. If your application cannot run macros at all, see your IT staff.

Internal or external changes

Macros may not address requirements because the requirements of the specific document have changed, or broader external changes have affected the validity and currency of the macro. This may be because of:

- changes to the organisation, such as change of name, address or trading name/s
- changes in statutory or regulatory requirements
- changes in billing or invoicing methods
- impacts of government, including changes to tax rates or corporate law, state government or council decisions.

Other difficulties may arise from antivirus software, especially when running macros. This should not be a problem if all your computers are running the same antivirus application, as any clicks you perform to 'accept' macros will be duplicated on the workstation running the macro. If you are using different software or some are using no antivirus applications, you may find you must define (record) the macros on those specific computers.

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Seek further assistance

Managers who do not work in IT are not expected to be software experts, though they do need a degree of technical expertise. The manager's role is to check for functionality and relationship to the organisation's objectives. Managers who do not possess the skills and knowledge to recommend specific changes should consider asking for additional assistance.

Understanding complex technical information calls for active listening and questioning techniques. Take notes, if necessary, to summarise what the speaker has said so that they can confirm that you understand correctly. You may also need to ask questions for clarification, such as 'When you said ... what did you mean?'

Sources of IT expertise can include:

- IT manager/staff
- software developer trainers
- online tutors and tutorials
- short courses
- external consultants.

Example: test for functionality

As part of a computer system upgrade, an office manager is asked to develop a client progress update form that includes data and information on the current state of a client's job and room for feedback or ongoing instructions. The manager asks an IT specialist for advice on choosing the best application. He suggests a web-based form with access to the company's back-end database for up-to-date data inclusion.

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The form is designed by the IT staff member and sent to the manager for evaluation. He finds that the format is difficult to read and understand. In addition, the feedback area is too large.

To match document requirements with software functions, the layout is adjusted and the format improved. To test functionality, the manager establishes a client email account and simulated job in the company's data system. He asks the administration staff to send him the document to test. He reads the form and compares it to the requirements, then fills out the feedback and sends it to the IT staff member for confirmation.

All the macros test positively and the system improves customer information and service automation.

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Practice task 10

1. Explain why it is important to test macros to ensure they meet documentation requirements.

2. Explain why less commonly used macros are at risk of developing problems.

3. Explain the process that you would expect a manager to follow if they identified that, due to technical reasons, a macro was not functioning satisfactorily.

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Summary

1. You are expected to have a working knowledge of the complex technical functions of software from a user's perspective, not necessarily from the programming side, and to be able to evaluate the functions for their usefulness in producing documents and templates.
2. The manager's job is to advise team members to use a range of software functions, so they need to know what the function does, how it can benefit document production and where staff can go to improve their knowledge and expertise.
3. You need to be familiar with commonly used documents and the software functions used to prepare them quickly and easily by automating aspects of the production, as well as making sure your team members are familiar with the functions and how to use them.
4. Document production software might include functions for data transfer, fields, formulas, importing and exporting, macros, linking, indexing and a table of contents.
5. You need to identify the type of document being prepared and determine the appropriate software function required to create the document in the most efficient way.
6. When evaluating software functions for their usefulness in automating document production, ask the question: 'For document x, do we need to be able to … [Function]?'
7. A macro is a shortcut keyboard command that allows you to automate a commonly used function to save time.
8. When testing functionality, you should know what system users will be viewing the document with and if the function produces the same results every time it is run.

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Learning checkpoint 3
Develop standard text for documents

This learning checkpoint allows you to review your skills and knowledge in developing standard text for documents.

Part A

To answer the following questions, you will need access to common office software and associated help files or online tutorials.

1. Consider a function you wish your staff to perform in a word processing (Word document) page. Summarise the following to demonstrate your understanding of this criterion:
   a) What task are you trying to achieve?
   b) What function have you chosen to achieve this task?
   c) How does this function help speed up document production?
   d) How does this function improve the usefulness of the document?

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2. Identify two examples of organisational Microsoft Word documents where you could use form fields. Describe how form fields would help expedite document production.

3. Describe the basic process of a 'look up' function when accessing an address from a spreadsheet database. Use dot-points and/or screen dumps to describe the process.

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4. Imagine that you require a template for an invoice used for a particular high-volume client that will include discounting for volume goods on a sliding scale. Identify the software most appropriate for this type of template and briefly explain (list and describe) what application functions this template would need.

5. Explain how a mail merge function allows you to efficiently produce multiple documents.

6. Create a macro function on a basic document of your choice. Describe what the intent of using the function is (in relation to the overall usability of the document). Test the function for usability and present the document to your assessor.

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7. In the table below, identify five complex technical functions of software that you need to be familiar with to produce documents efficiently for your department/organisation. Identify the ones you are confident you understand and seek expert help to understand complex technical functions that you do not understand well. Briefly describe how the functions are useful in automating document production.

Function	Working knowledge of (✓ or X)	How it aids efficiency of document production
Form fields	X	• Limits data entry requirements • Verifies data entry • Formats data
Document protection	✓	• Protects documents from unauthorised access • May be used to protect sections of the document from being altered by general users

8. Describe the options you have when you need external expertise to assist you in evaluating complex technical functions, including the creation and testing of macros.

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Part B

This project requires analysis of an existing letter document. It can be from within your organisation or from a template within a software application (such as Microsoft Word).

Ensure the document has automated features such as form fields and macros. A suitable letter document might be one designed to inform your organisation's customers or staff about something; for example, information, announcements, billings, orders, credit issues, marketing ideas, meetings or planning sessions.

Carry out an analysis of the document and complete the following tasks.

1. Evaluate the functions used within the document for usefulness in automating document production. Suggest improvements where applicable.

2. Test the function of the document to ensure the automated fields and macros perform correctly. Note any issues you encountered. Print the document and submit it to your assessor.

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3. Does the form match the organisation's requirements? How?

4. Are there any legal, ethical or privacy requirements that may need to be associated with this form; for example, the inclusion of formatted text disclaimers or warnings?

Topic 4
Develop and implement strategies to ensure the use of standard documentation

Business environments thrive when there are systems in place that support the organisation's strategic direction. Administration processes, which include the development and appropriate storage of standard text documents, are integral elements of the support system.

It is important that all staff are familiar with templates and standard formats so that documents they produce will have the same style and format across the organisation. The use of the same colours, logo, language style and design features ensures that documents are easily recognised as belonging to the organisation, which guarantees a consistent corporate image. Training and monitoring staff to ensure they understand and comply with organisational requirements for document production are key responsibilities of a manager.

In this topic you will learn how to:

4A Prepare explanatory notes for the use of templates and macros

4B Develop and implement training in the use of templates and macros

4C Manage master files

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4A Prepare explanatory notes for the use of templates and macros

Templates and macros are useful for automating formatting functions and common user tasks in document production. However, without proper training or notes on how to use them, staff will not widely accept them or use the functions to their potential. As a manager, supervisor or team leader, it is essential that you provide relevant information and training to team members so they understand what they are expected to do in terms of document design and production. This might include arranging information sessions, providing training, developing 'How to' booklets or creating easy-to-read information sheets.

Use appropriate language and style

Instructions should be written clearly and concisely so all users can understand what they are meant to do. Use language other people are likely to understand. You might need the help of an IT expert to ensure that the more complex commands are translated into language that everyone can follow. If the instructions are too technical, many people may decide the process is too difficult for them.

Although it may be impractical to prepare different instructions for different users, you may need to develop simple instructions for those people who find it difficult to understand technical instructions or for those whose first language is not English. Write instructions and then re-read them to determine how they can be written more concisely.

When describing the use of templates or macros, your use of language should be deliberate. The words you use should be to the point; for example, 'Enter first name in field 1; surname in field 2'.

Present instructions

The way you format explanatory notes will have a direct correlation to their effectiveness; the more complicated the layout, the less effective it is. Similarly, the more words per page, the less effective it will be. Keep your explanatory notes to between 200 and 300 words per A4 page.

Using a numbered structure and figures may make explanatory notes easier to follow. In technical manuals, numbering allows for easy referencing, relatively easy modifications and consistency. This style also permits alteration and modification in the future. Standard numbering systems include module, heading, paragraph, page and figure numbering laid out in a hierarchical method (lowest to highest). Avoid using roman numerals.

As a visual medium, text should be kept concise and diagrams or screen dumps should be used where possible to illustrate progressive tasks. It is a good idea to establish a pattern so the reader knows what to expect.

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Here is an example of an explanatory sequence process.

Example explanatory sequence
1. A brief description of the template or macro 2. What it is used for 3. How to use it 4. Where to go for help if needed

Explain how to access and use templates

It is a good idea to prepare a template directory listing all the templates your organisation has developed. Explain why templates are useful and why staff should use them.

Specify where they are saved and why they are saved in this way. For example:

'Because templates are used by various staff members, we need to ensure that no changes are accidentally made to them. Templates are therefore saved in a specific location as a special template type. When you use a template you actually open a new document based on that template, which ensures the original remains unchanged.'

Continue to promote the use of templates through staff meetings and when delegating tasks to team members. As well as generally informing staff about available templates, you need to provide specific instructions on their use. Clearly and concisely explain what the user needs to know.

Explanations on templates could include:

- what the template looks like when they first access it
- where they are to add text to complete the document
- basic functionality of the template (for example, sare there macros present?)
- who to contact should the template not function as advertised
- what their responsibilities are for saving the document.

Explain how to use macros

Notes explaining how to use macros do not need large amounts of information about how the software performs the task, but should be short and precise, explaining how and when to use the macro. The notes should follow a pattern to make it easy for users to make their way through the instructions.

Use headings that include:

- what the macro is for
- the shortcut commands or button names
- how to use the macro
- what steps are not included in the macro (for example, steps for documents that are unique or outside the norm).

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Example: use a macro

The following clearly explains how to use a macro.

Insert

To insert the copyright disclaimer, press the ctrl + shift + 'c' keys together on your keyboard.

Activate

To insert the copyright disclaimer into your document, centre your cursor approximately where you wish to insert the text. You will then need to press and hold down the ctrl + shift + 'c' keys simultaneously. This activates the cprt.mcr macro and inserts the pre-defined text from the database into the template. It is important that this macro is only inserted in documents that are for external distribution.

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Practice task 11

Develop a step-by-step explanation for the use of a basic Microsoft Word template of your choice. Provide a copy of the template and explanation to a colleague or your trainer for feedback about the usability and readability of your document. Make any necessary changes. Record the steps and make notes on feedback and amendments.

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4B Develop and implement training in the use of templates and macros

With any implementation strategy, it is important to allocate time and resources to training. All staff should be given training in how to use the templates, macros and other administration system documents. The complexity of the system, cost constraints and the depth of knowledge required to fulfil their roles determines what level they need to be trained to. Cost constraints should be determined at the planning stage.

Developing and arranging the training may be the responsibility of a manager, or may be arranged in consultation with an HR manager or the organisation's training and development department if appropriate.

Training is best done in the workplace with a hands-on learning approach, combined with trainer support. In some circumstances, a manager might assist staff in self-directed learning.

You may wish to use internal or external trainers. For commonly used office templates and macros, internal training is often more cost effective and easier to implement. For complex systems, trainers provided by software developers are often preferred.

Types of training

Become familiar with the characteristics of different training strategies in order to select an appropriate strategy for staff. One strategy commonly selected for training new staff is a buddy system or mentoring. A colleague is delegated to mentor a new team member to guide and support them by answering any queries they may have about the templates, watching as they use them and offering tips and suggestions.

In-house coach

Dedicated coaching sessions to train staff in using templates and macros can be conducted one on one or in small groups. Coaching requires the trainer to be a subject matter expert in the use of the templates, macros or other systems, and have the skills and ability to communicate effectively by using appropriate language, actions and interpersonal skills.

Coaching provides flexibility for the learner, targeted support and direct feedback. Progress can be as quick or as slow as the learner requires. In group environments, you must ensure there are sufficient resources for all staff to practise the processes. This means that all staff must have access to computers, the organisation's templates and paper-based notes that they can understand.

In-house coaching is likely to be appropriate for training staff when a considerable number of new templates are being adopted at the same time and when new templates are complex or have legal requirements.

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The following outlines a basic coaching process.

A training sequence employed by many coaches
Explain: Explain the process and why it is going to occur.
Demonstrate: Show the learner how to perform the task. (Some practitioners prefer to demonstrate first. The advantage is that the learner sees what is to be done before having it explained.)
Practise: Allow the learner to try for themselves. Provide them with your instruction notes so they can follow them if they forget a step.
Correct: Make any adjustments as necessary to ensure they complete the task in the prescribed manner.
Trial: Provide opportunities for the learner to try it by themselves.

Self-directed training

When resources are scarce or conditions require a different approach to coaching, self-directed learning may be appropriate. The use of user-accessible online content to explain the use of macros and templates, such as short videos and podcasts or downloadable MP3s (audio files), and the use of sites such as YouTube for self-directed training have become increasingly popular with organisations. Animated and narrated presentations can be uploaded for the learner's attention, which can be particularly useful for geographically dispersed work groups. A manager who selects this approach will need to provide detailed planning, monitoring and control of the training process.

Here are some suggestions on how you might keep staff motivated and measure their progress.

How will you ensure staff members are motivated?

- Are external motivators required?
- Would providing a positive motivator such as time off when the training is successfully completed inspire staff to undertake the training?

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What support materials will guide staff?

- Would web-based materials or physical hand-outs be more appropriate?
- If it is web-based, the training material can be re-used and altered relatively easily, although set-up costs are higher.
- Many software suites offer online tutoring. If your templates or macros are generic, consider free online tutor resources offered by the larger software companies.
- Alternatively, provide instruction notes.

How will you measure staff progress?

Consider the use of online or electronic monitoring and control methods that flag the completion of specific milestones in the staff member's training. For instance, if they complete a document within the required parameters and submit it correctly, a flag is triggered indicating successful completion to the manager.

Adapt to user needs

Training is more effective when it aligns with the learner's needs, interests and learning style. Establishing learning style is not an exact science. There are still many approaches including matching personality traits to learning; for example, using the Myers-Briggs indicator test or establishing experiential learning models using the Kolb Learning Style Inventory (LSI). If time and expertise in the administration of the test are available, the outcomes can be useful for training development.

Training a group means that you will have a diversity of learning styles so make sure you provide a range of methods such as demonstrations, explanations, notes, visual documentation, opportunities for questions and practice. Some people may prefer self-directed learning. The level of complexity also needs to be considered. Target the language and level of technical expertise required to the needs of the user.

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Categories of technology

Here are descriptions of four categories of technology users and their instructional needs.

Infrequent users

Basic instructions

A worker who rarely uses templates and macros may need only basic instructions, although you will need to check that they understand and can use the templates and macros they are required to use in their job role.

Frequent users

Define, explain, practise

Workers who need to use templates and macros frequently, but have never been instructed before may need you to provide clear definitions, explain how to access and save templates, explain when and how to use macros and provide lots of opportunity for practise.

Technically proficient

Allow for rapid progress

Workers who are technically proficient will be able to understand technical terms more readily and progress faster.

Users who need language support

Clear instructions

Workers who need assistance with English will need clearly written and spoken instructions, with plenty of opportunity to ask questions and time to practise. You may need to prepare notes that are more appropriate for them.

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Example: documentation training

New administrative workers in a large financial organisation are often required to complete documentation for clients in line with the clients' own template-generated documentation. Often the templates are very different from one another and the clerks can easily get confused with the requirements.

Clients are asked to provide examples of completed documents and any explanatory notes they may have available. Clients who provide this information find that their documentation is getting completed faster and to a better standard than those that do not provide adequate support materials.

In order to meet clients' needs, the financial organisation creates their own guidelines based on the various documents received from their clients. The guidelines are in the form of a short video loaded onto their intranet server for all administrative staff to access. Writing style, types of client audiences and various expectations are addressed. The five-minute videos are a hit with new staff who find they are able to grasp the clients' needs and employ the functionality of the new templates and macros much more quickly thanks to the extra training.

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Practice task 12

Develop a training plan for the use of a standard template at your organisation. Your training approach should cover the following topics:

1. What document do you plan to train for?

2. Summarise the types of learners you believe your audience to be.

3. What training methods will you use?

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4. What resources will you need?

5. What training steps will you follow?

4C Manage master files

The templates you create for your office administration system should be used in a consistent and reliable manner; otherwise, there may be a breakdown in the integrity of the document and a loss of confidence in its use. To maintain the robustness of the document, a master file must be created. This avoids the risk of unauthorised alterations and maintains the standards and layout you originally intended.

Produce a master file

A master file is a record containing all the criteria required by the originator and is retained on a relatively permanent basis in the organisation's information system. Most medium to large organisations should have a policy or procedure that provides guidelines for the creation of a master file. These organisations usually run information management systems from central servers and require all master files to be stored on a designated file server or web server.

Here is essential information on how a master file needs to be presented.

Password protected

The master file must be password protected to prevent unauthorised alterations. A password can be allocated to a file depending on the system you use. Alternatively, document templates may be protected using common software add-ins or existing file protection macros, such as Microsoft Word's 'protect document' function. System passwords should also be shared with IT personnel in the event that the originator is not available.

Formatted

The master file should be formatted and styled in the way intended for ongoing use. That means the fonts, fields, macros and titles should all match the organisation's intended design criteria.

Available

The master file needs to be accessible for those who need to use it. Burying it deep in some complex filing system is unproductive and frustrating for those who may use it regularly. Shortcuts or html links directly to the file may be appropriate.

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Naming conventions

Master file types vary between systems, and file extensions are dependent on the system you are using. The file extension indicates that the file has been saved as a template, rather than an editable document.

Naming the master file will depend on your organisation's naming conventions. It may include the full name, an abbreviated name, a series of alphanumeric characters or a date-based convention. If you are not responsible for creating the naming conventions, check with your manager or IT personnel before naming a master file.

Extensions of templates or master files can include the following.

Master

This extension type is used for html-based files; those created for web forms only.

Dot or Dotx

This Microsoft extension type is used for Word templates. The extension may change if the document is published to the web.

Xlt or Xtlx

Microsoft Excel templates are commonly employed as document templates for data entry.

Adn, accdt, mdt, or adnx

These apply to Microsoft Access, a database suite with forms and designs often circulated through organisations.

Circulate and print master files and copies

Templates need to be made available to those who need to use them. Printed copies of macros and templates can be distributed to staff who will be using them, along with clear instructions on their use. External expertise in the form of online tutorials or assistance from your organisation's IT staff may need to be sought for some printing actions involving spreadsheet macros.

Options for informing staff about a master file are provided here.

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Informing staff about a master file
Email: an email can provide users with direct access to the document or, preferably, a link or shortcut to the document's storage location. **Posting:** the file can be posted on the organisation's website or intranet, or posted via the mail to supervisors to disseminate to staff. **Other means:** central noticeboards, blogs, posters or other similar means can be used to communicate the new template and access instructions.

Example: adapt to new templates

Consider the following examples of updates being made to templates and master database files.

Example 1:
Match user needs

Developing standardised templates for its writing projects is a key competitive strategy for a technical manual publisher. The designs allow experienced technical writers to 'fill in the blanks' under specific template headings. However, there are still issues with designing templates that all writers approve of and understand.

The managing director wants to create a uniform approach to the templates but doesn't know how. As a first step, she asks her HR manager to identify the learning styles of each of the writers to identify the best method of creating a standardised approach to training them.

The results of the test show that most of the writers prefer visual learning. They respond particularly well in areas that suggest the use of examples and demonstration.

It is decided that the training will centre on a brief summary of explanatory notes and a supporting video recorded by the template creator (a senior developer in the organisation). The training is trialled and the feedback indicates that the writers are not only pleased with the information, but better understand the use of the templates they had been using.

Both the templates and the training system are uploaded to the file server for storage and access.

Example 2:
Update master files

The central servers for a large advertising agency are located in Perth. However, each state office requires access to a local, yet common, database system. The databases resides on local servers, so in order to update the master file the IT manager in Perth emails each state manager with an executable file. This file automatically launches the database system on the local server, dials the central server and updates the local files from the master file in Perth.

The system allows for central control and circulation of any updates to the master files. Additionally, if the changes are significant, the IT manager sends a brief instruction sheet explaining the new use of the database form.

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Practice task 13

Locate a master file from your organisation's information system, or search for one online.

1. Describe the type of file it is; for example, database, document or spreadsheet. Explain who is responsible for updating the file and how the file is circulated to relevant staff.

2. List the measures used for the security of this master file.

Summary

1. Explanatory notes on how to use templates and macros should be direct and concise. Overly descriptive wording can lead to confusion.
2. Proper training using explanatory notes will help staff in your organisation to accept new templates and use the functions to their potential.
3. Training must consider the audience; that is, the type of learner expected to use the training materials.
4. Production of master files should include file protection, appropriate formatting and a strategy for accessibility.
5. Master files can be circulated via email or posted on organisational websites, such as an intranet or staff web page.

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Learning checkpoint 4
Develop and implement strategies to ensure the use of standard documentation

This learning checkpoint allows you to review your skills and knowledge in developing and implementing strategies to ensure the use of standard documentation.

Part A

1. What should be considered when preparing explanatory notes for the use of a template or macro? Explain your answer.

2. Write a clear explanation for the use and execution of a macro that could be included in explanatory notes for staff.

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3. Prepare a training plan for introducing staff to a new template for writing business reports. Include suitable training strategies and support materials, including an example of the report template and explanatory notes. Explain how the training strategies suit the learner's needs. Present the training to a colleague or class member. How effective was the training? What helped both you and the learner?

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4. A master file should be formatted, secure and accessible. What steps can be taken to ensure that these three requirements are met?

5. Describe how you would circulate a master file template in your organisation.

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Part B

Read the case study, then complete the tasks that follow.

Case study

A construction company has developed several templates to provide for the various legislative documents required in the residential building industry. These include the following:

- A site inspection template – observation checklist with spaces for measurements of soil acidity, soil settling index and building quality and space for a hand-drawn map
- A building inspector's inspection template – observation checklist with spaces for notes and measurements of tolerances in struts, beams, studs and bracing
- A building inspector's report template – standard report format bearing company name/logo on cover, formatted headers/footers and several paragraphs of standard text disclaimers and duty-of-care statements
- A quality assessor's inspection template – observation checklist similar to the building inspector's inspection template, but including reporting on cosmetic finish, landscaping and driveways/paths
- A quality assessor's report template – report format bearing company name/logo on cover, formatted headers/footers and several paragraphs of standard text disclaimers and duty-of-care statements
- A customer's quality report template – more readable report format with full-colour company name/logo on cover with photograph of finished building; formatted headers/footers; the requirement for photographs of the property to be inserted; four paragraphs of standard text disclaimers, copyright warning and duty-of-care statements; and the formal legal building warranty statement (three pages)
- A customer's cover letter template

The templates must comply with strict legislative requirements and meet industry standards. The templates will be filled out by senior tradespeople who have been promoted to building project supervisors, and submitted to the organisation's administration staff to forward to the authorities and for filing.

1. Make a list of headings for necessary generic information that you would include in the explanatory notes for workers at the company (that is, a general direction to users such as 'when to use', 'what it does', 'what it doesn't do'). Use appropriate, consistent language.

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2. Describe the language, format and style needed for each of these documents and any attached explanatory notes.

3. What method of delivery would you choose for training the project supervisors to use the new templates? Why?

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4. How would you disseminate the master file information to the project supervisors?

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Topic 5
Develop and implement strategies for maintaining and improving documentation

Continuous industrial, technological, market and legislative changes mean that continuous improvement is essential in all aspects of business administration. It may be part of your job to ensure that your organisation's processes, templates and systems remain current and continue to match business goals. Elements of business that may change include compliance standards, competitive effects (pricing changes, product line changes, technological change, business philosophy change), and related tactical strategies (marketing approach, medium- and long-term organisational targets or goals). For this reason, documentation should be regularly monitored, maintained and improved to suit current and future needs.

In this topic you will learn how to:

5A Monitor use of templates and macros, and evaluate document quality

5B Review documentation standards against the changing needs of the organisation, and plan and implement improvements

5A Monitor use of templates and macros, and evaluate document quality

Templates and macros are developed to ensure all documents produced by staff adhere to the organisation's quality standards and can be produced and reproduced easily and efficiently. Once relevant templates and computer shortcuts have been developed and staff trained in their use, you need to monitor how well staff are applying them in their work and whether the templates and macros continue to meet organisational standards. Choose monitoring methods that suit organisational processes, but review and improve them regularly; for example, by formalising and scheduling more frequent audits.

Monitoring methods may include:

- following an approval process that includes checking documents conform with template requirements
- using a document register
- conducting regular audits of documents chosen at random to ensure they conform to templates
- conducting regular reviews of templates and updating them as required.

Use templates and macros correctly

It is your responsibility to check that documents produced by members of your team are being prepared using the organisation's document template. You may need to provide additional training if you find out that a team member is not using a macro or template because they are unsure of what to do. There are a number of strategies you can use to monitor the way that templates are being used.

Monitoring strategies
• Check each document a team produces until you are satisfied they understand the template and macros to be used (or appoint a supervisor to do so). • Discuss the templates at a team meeting and confirm what staff need to do if they are unsure about anything. • Establish a document register and archive that requires team members to save a copy of their documents. • Ask new staff members to describe the templates they use. • Circulate a reminder email or memo.

Evaluate document quality

Managers must ensure that documents produced by their team or individuals they are responsible for meet the quality standards set down for documentation production in the organisation's policies and procedures manual, as well as meet legislative requirements where necessary. Templates may need to be redesigned or removed if they do not meet documentation standards.

Quality control can be monitored by regularly comparing documents that staff produce with master documents. It is also important to regularly evaluate staff knowledge and skills, and offer training to address identified skill deficiencies.

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Here are several questions that may be posed when evaluating organisational documentation.

You need to ask the following questions:

- Does the document meet the needs of the information system and the overall needs of the organisation?
- Have there been changes to standards or organisational goals that affect the use or content of the document?
- Does the resulting document comply with current organisational standards, regulations or legislation (if relevant)?
- Are the language, layout and security still in line with organisational standards or audience requirements?
- Is the document still required? Is the template still needed?
- Does the template for the document need to be modified? For example, does the organisation have a new logo?
- Is the template being used as intended, or is it being inappropriately manipulated or altered?

Evaluate documents against standards

Checks can be applied to specific aspects of a document under the general headings of purpose, compliance, security, language, approvals and format. These are particularly applicable at the template, macro or document production stage, but may also be used later in the life cycle of the document, when a regular review takes place.

Check the following points when evaluating documents.

Purpose

- All the required content is included.
- The template or macro meets the required purpose.
- The document or macro is appropriate for the intended audience.
- The document or macro has been tested by a group of users before being distributed.
- Relevant feedback has been incorporated in the document.

Compliance

- The template or macro meets all relevant legislative requirements including privacy and anti-discrimination laws.
- The template or macro complies with organisational requirements.
- The template or macro complies with style guide requirements.
- The template or macro has all required standard inclusions.

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Security

- The template or macro is appropriately protected.
- The template users make amendments to pre-defined elements.
- The master file is stored in an appropriate location.

Language

- The language is clear and concise throughout.
- Technical jargon is used appropriately.

Approvals

- Appropriate technical, managerial and legal personnel have or will approve the template or macro before its release to users.
- Final documents have been edited and proofread according to organisational guidelines before circulation.

Format

- The format is clear and uncluttered.
- There is appropriate use of white space.
- Graphics are presented consistently and labelled appropriately.
- Branding guidelines have been met.
- The template or macro meets style guide requirements.
- The final format is accessible to all users of the template, macro or document.

Non-compliant documents

If a document no longer complies with organisational standards, it may become compliant through editing. Non-compliance with state legislation may require control actions to be taken because organisations must take all reasonable steps to be compliant and to inform staff of changes, and may be liable if a non-compliant document is in use.

Control actions may include:

- advising all affected employees that the document or template is no longer compliant and that they should not use it until it is updated
- removing affected templates from circulation
- updating the master file with a comment that the template is no longer current and should not be used
- implementing a plan to update the template to reflect the new legislation.

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Example: document integrity

A security organisation issues monthly security reports to large corporate clients (those with more than 100 employees) in New South Wales. The reports include any breaches of security or risks that have been observed and noted by security staff. The reports are automated templates that gather information from the security staff and integrate it into the company's standard report, which includes pie charts and a date/ time stamped report list.

Currently, no-one checks the final documents before sending them out and it is possible that inaccurate, misleading or false data may be entered by the security staff. In addition, the template is only set up for New South Wales; the company is keen to seek interstate business and security legislation differs between states.

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To avoid these risks, managers improve their monitoring by including a checklist that requires a manager to sign-off staff entries prior to the submission of the report to clients. Additionally, the organisation's IT staff are given a project to develop a postcode-triggered macro that changes the template automatically with the relevant legislative references and requirements of the form based on the client's postcode.

Practice task 14

1. Use dot-points to describe how you would monitor the use of templates and macros in your team.

2. Describe the consequences (in relation to document and data integrity) if members of your team don't use prescribed templates and macros.

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5B Review documentation standards against the changing needs of the organisation, and plan and implement improvements

It is crucial that any information identified in the monitoring process is used to improve the documentation an organisation produces. This will ensure that business documents continue to meet the organisation's image and quality standards and remain current with the organisation's changing needs.

Review documentation standards

Document reviews are essential to ensure the organisation remains compliant with legislation, current industry practice and organisational goals, protocols and standards. Here are several examples of when an organisation may review changes to documentation.

An organisation may review and change documentation when:

- it has expanded considerably since it designed its templates, and now requires a more professional image
- it has changed its direction and needs to produce a new range of templates to meet new document requirements
- it has embraced technology or implemented new document software
- there is legislative change with implications for documentation.

Implement documentation improvement

A change in legislation or in the organisation may prompt a review of documentation. Subsequent planning and implementation of documentation change may pass through recognisable stages, with particular strategies being useful for each stage.

Here are some strategies that can be used to improve documentation.

Identifying change	**Identifying change** • Performing regular reviews and audits of templates • Comparing new compliance requirements with existing templates and documents
Developing improvements	**Developing improvements** • Researching requirements with subject matter experts • Consulting users of templates • Consulting end users of the documents

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Gathering feedback	**Gathering feedback from stakeholders** • Circulating draft templates and sample documents to stakeholders • Collecting specific feedback about individual features using forms, questionnaires or discussions as appropriate
Incorporating feedback	**Incorporating feedback** • Making amendments based on stakeholder feedback as appropriate
Securing approval	**Securing approval** • Circulating documents among senior management and key stakeholders for approval as required

Strategies for version control

Here are several strategies that can be used to ensure version control of all workplace documentation.

Updating version control documents

- Summarising the changes made and the reasons for the change
- Updating the name of the master file to reflect the version information

Communicating change

- Emailing template users with information about the change
- Describing changes in staff meetings or other appropriate forums
- Displaying information on noticeboards or intranet sites

Circulating revised documents

- Emailing links to master files
- Emailing copies of master files
- Posting copies of master files to an intranet location
- Posting hard copies of master files for circulation

Conducting training

- Holding coaching sessions for individuals or groups
- Establishing a mentoring program
- Developing support materials for self-directed learning

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Conduct a review

Approach a review methodically by conducting an audit, or analysis, of the document systems; this process will help to identify gaps and needs in current document design and usage. Compare the results with the standards you or your organisation requires. For example, an audit might reveal that the layout of a template no longer meets the organisation's image requirements: there may need to be more fields in a spreadsheet, or simple changes may need to be made as names, titles, telephone numbers and locations may have changed.

Regular reviews are recommended to ensure you cover a legislative change or a need to respond immediately to a change in focus. Complex documents and macros may need specialist input. Always have adequate knowledge or resources available, such as IT or legal advisors, when carrying out a document audit to ensure documents are suited to their purpose.

Ensure documents match organisational requirements by considering their:

- purpose – what function the document is to perform; for example, provide advice, demand payment, suggest options
- intent – the tone of the document; for example, demanding, conciliatory, apologetic, succinct
- audience
- overall readability – wording, language, design, effectiveness and layout
- image.

Plan improvements

After a major review, you will need to gather all the relevant information you have identified. Planning should be a consultative process including relevant stakeholders such as audience representatives, draft writers, software developers, IT personnel and senior staff/managers.

Depending on the extent of the change, the plan should be drafted and circulated between stakeholders for comment before being finalised and implemented. Here are examples of contributions to be expected from stakeholders.

Template users	Defining user requirements, identifying strengths and weaknesses of existing templates, and identifying potential improvements.
Subject matter experts	Defining required content of end document.
Document audience	Defining required content, and providing feedback about desired design, content and finish.
Senior managers	Approving changes, defining content, and providing guidance on design, content and finish.

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Professional improvements

Here is a list of other professionals that may be involved in the planning process for document improvements.

Technical experts

- Providing input about software functionality
- Providing input about template design

Draft writers

- Developing standard text for templates

Software developers

- Providing input about software functionality
- Designing macros, add-ins or other sophisticated functions as required

Delegated staff member

- Updating templates for minor details such as changes to telephone numbers and addresses, to ensure basic information is always correct

Legal counsel

- Updating legal inclusions such as disclaimers and privacy statements
- Approving final copies of documents

Writing a plan

Document life cycle plans may be developed for documents that are being created as a necessary part of another project, such as an IT project, or they may be created for stand-alone documents or a series of documents. If they are the first type, they may give more prominence and detail to the content writing phase. This would be the case with documents such as a user manual for a new and complex software program. The plan may have to include contingency planning to accommodate the availability of external subject matter experts. Time lines might be tied in with non-document related phases of the project.

Both types of plans may include stages similar to the following:

- Details of personnel, costing and expected timing (for example, 2 documents x 3 hours per document)
- Document approval
- Content development, including proofreading and editing
- Design

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- Testing
- Implementation, including training
- Review

Implement improvements

Make sure you have a timetable for implementation so the changes are incorporated smoothly and efficiently and everyone knows when and why the changes are being made.

Implementing the improvements to a time line allows the organisation to plan for the new system by arranging for any support (such as training) or communication to relevant stakeholders.

When implementing improvements:

- motivate users to implement the change in the required time frame
- allow for regular monitoring of the implementation
- make allowances for feedback and modification
- put a measureable objective in place for the organisation.

Communicate to staff

Smooth incorporation of changes requires good communication and needs to be timely and not cause undue stress among workers. If you are delegating the changes to a staff member or technical officer, make sure your instructions are clear. Check what they have done to ensure it meets the new standards required. Communication strategies to other staff will reflect the extent of the change.

Communication strategies may include:

- discussing the implementation at a staff meeting
- sending a memo or email to staff
- preparing a notice for display.

Example: approach to documentation change

A large commercial plumbing company has built a loyal following of suppliers. The supplier representatives are trained in the company's purchasing systems and are familiar with the format and standards of its documentation. Four years ago, the company moved to an extranet system where the ordering was to be fully automated between the company and its suppliers' warehouses.

There were four main objectives: reduce supply and paper/printing costs, improve delivery speed, improve re-stocking speed, and sustain or increase business with current suppliers.

The objectives were sound and justified but planned improvements were significant. The IT manager responsible for the audit of the existing systems and the implementation of the new systems had an immense job. It took the company 12 months to completely implement the system. Quarterly reviews followed to ensure the original objectives were being maintained.

The following strategies were applied to ensure the correct approach to documentation change was followed.

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The plan

1. All the current systems had to be duplicated as suppliers were familiar with the standards the plumbing company required.
2. Requirements had to be compared with the new system capabilities.
3. System capabilities needed to be compared with the new organisational objectives.
4. Document usage, layout and readability needed to suit each supplier.
5. The system had to be trialled with all suppliers and reviewed before full implementation.

Practice task 15

Select a document template or macro used in your workplace, or an organisation you are familiar with. Carry out an audit of the document and create a plan for implementing any improvements. Note how these improvements maintain accordance with organisational standards and objectives. Summarise your findings.

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Summary

1. The processes, templates and administration systems should support the attainment of business goals and must therefore be as flexible as required under the business plan.
2. Managers should check that documents produced by members of their team or those under their authority are being prepared using the organisation's document template.
3. Documents and macros should be monitored for usage, relevancy, compliance and quality.
4. Check that templates and macros are being used correctly by checking the documents a team member produces, discussing templates and macros at a team meeting, circulating a reminder email, or providing additional training if you find out that a team member is unsure of what to do.
5. Check that documents meet the quality standards set down for documentation production in the organisation's policies and procedures manual, as well as meeting legislative requirements where necessary.
6. Documents may be audited in terms of purpose, intent, audience and overall readability.
7. Control actions to ensure documents meet quality standards include document redesign, staff training or document deletion.
8. Planning document improvements should include relevant stakeholders.
9. Have a timetable for implementation so the changes are incorporated smoothly and efficiently and everyone knows when and why the changes are being made.

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Learning checkpoint 5
Develop and implement strategies for the maintenance and improvement of documentation

This learning checkpoint allows you to review your skills and knowledge in developing and implementing strategies for the maintenance and improvement of documentation.

Part A

1. Describe what method of document monitoring occurs at your workplace, or an organisation you are familiar with. What recommendation would you make to improve this process?

2. What control actions might you use for a document that no longer complies with state legislation? Why?

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3. When planning improvements for documents or macros in your workplace, or an organisation you are familiar with, who would you involve in the process? Why?

4. Describe how you would implement a document improvement plan in your workplace, or an organisation you are familiar with. Why would this approach be the most suitable?

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5. Create a checklist to analyse template, macro and document production.

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6. Select a template or macro and use the checklist to analyse the currency, design efficiency and quality of the template/macro in relation to the organisation's needs.

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7. Prepare a plan to implement the changes that need to be made.

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Part B

Read the scenario, then complete the tasks that follow.

Scenario

You work for an independently run sewage treatment plant that uses standardised government forms to communicate with council and state government representatives. The forms allow users (usually managers or senior staff) to input text in a pre-defined letter or memo format. The relevant council or government contact's details are included on the forms using a macro that looks up the CEO's contact list for the relevant details. The details include their name, department, position, email address and postal address.

The forms allow the users to electronically sign their names at the bottom by inputting their first name.

The CEO has asked you to audit the communications process. She indicates that the organisation's primary goal is to maintain the contract with government bodies.

1. Describe the possible risk implications of the business's current system.

2. What measures would you instigate to monitor the use of the templates and macros? Describe how your methods would align with assumed organisational standards such as compliance and client service.

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3. Explain how the documents might be evaluated against these organisational standards.

4. Describe a brief plan for implementing improvements to the current system. Ensure you consider stakeholders and organisational objectives in your response.

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