

## I. Introduction to Formatting, Alignment, and Page Setup

- A. **Font formatting** – appearance, size, and attributes of text. The format chosen for font is important for communication purposes
1. **Bold** – used to emphasize a specific word
  2. **Italics** –used to indicate book titles and other published works
  3. **Underline** – used to indicate links to web pages and should be reserved for that purpose in most cases
  4. The **accent symbol**, such as in the word *résumé* is used to indicate emphasis during pronunciation
  5. **Style** – a format tool used to apply global font formats to text
  6. **Subscripts** and **superscripts** – used respectively in chemical definitions, such as H<sub>2</sub>O, and for footnotes or reference purposes, such as in *Webster's Dicitonary*<sup>1</sup>
  7. **Small caps** may be used to format titles or headings in a document
  8. A **serif font** is one that has small attributes at the tips of each letter
    - a. The most commonly used serif font is Times New Roman.
    - b. Often used in the body of a letter or report
  9. A **sans serif font** does not include the attributes at the tips of each letter
    - a. Arial is a sans serif font.
    - b. Sans serif fonts are commonly used in title texts and serifs are commonly used for the body text
    - c. While there is no steadfast rule that dictates a sans serif font must be used for titles and a serif for body, this practice is used more often than not in hard copy materials
    - d. Serif fonts are said to propel the reader forward because of the natural right-sided slant of the letters
    - e. Sans serif fonts are the preferred font for web-based content
- B. **Paragraph formatting**–arrangement of text within paragraphs on a page Properly and uniformly formatted paragraphs are also important for communication purposes
1. **Indents** – used to indicate a new paragraph and offset long quotes
  2. **Line spacing** can be set for single, one and a half lines, double, or triple
  3. **Borders and shading** are used together or separately to emphasize a specific textual element in a document

- For example, an introductory paragraph of people who contributed to a project might be shaded and a border added for emphasis
4. **Bullets/numbers** are used to list items
    - Bullets may be symbols or numbers
    - Use bullets when the items are non-sequential
    - Use numbers for procedural lists that must be accomplished in a specific order
  5. A **hanging indent** is most often used in reference materials
    - The first line of a hanging indent begins at the left margin and all remaining lines of the paragraph are indented five spaces from the left margin
  6. **Endnotes/footnotes** – used to add reference and commentary information to textual content
    - a. **Endnotes** are source references that are placed on a Notes page at the end of a document. Within the document, each reference is indicated by a superscripted number or symbol
    - b. **Footnotes** are source references that are placed at the bottom (foot) of the same page and are indicated by a superscripted number or symbol within the document
  7. **Cut and paste** is a tool used in paragraph formatting that allows the user to move text from one location to another
  8. **Paragraph headings** are keyed at the beginning of a paragraph in bold font to give the reader a quick idea about the content of the paragraph
    - The styles and headings feature in most software packages allows paragraph headings to be globally formatted and indexed
  9. **Tabs** are used to align and organize data into groups and subgroups
    - a. A left justified tab allows text to be aligned on the left margin
    - b. A right justified tab allows text to be aligned at the right margin
    - c. A dot leader tab places a series of periods between two sets of tabs or a tab and a margin
  10. **Word wrap** – automatic continuation of text from line to line
  11. **Tables** – used to arrange text in columns and rows and are helpful in presenting, organizing, and clarifying information

- C. **Page formatting** – arrangement of text on a page. The arrangement of text on a page is the culmination of text and paragraph formatting that presents the final picture and communicates a message to a reader
1. **Margin** – the amount of white space around the sides of a document
  2. **Page orientation** – used to enhance the appearance and improve readability of a document
    - Page orientation may be landscape (wider than tall) or portrait (taller than wide)
  3. **Headers and footers** add global information to a document, such as page numbers and document titles
    - a. A document may contain more than one header and/or footer
    - b. Books and manuscripts are often formatted with footers that change to reflect the titles of each chapter
    - c. Section breaks control the flow of headers and footers
  4. **Orphan and widow protection** is usually a default feature in word processing software
    - Orphan and widow protection means that a single line of a paragraph is **not** left alone at the bottom of a page (orphan) or at the top of a page (widow)
  5. **Page breaks** may be manual or automatic and are used to manage the content on a page
    - a. A **soft page break** occurs automatically through the word wrap feature of the word processing software and text is simply continued to the next page when the space on the previous page is exhausted
    - b. A **hard page break** is performed manually when a new page is needed for a break or change in content
  6. **Columns** are used to format text for documents such as newspapers and newsletters
    - Text is arranged in columns with or without vertical lines between each
  7. **Borders** are used in page formatting to add lines around text or graphic images

II. **Business Documents - Business documents are formats and methods of communication.** In business, many documents are used and each has a specific purpose and consists of specific components

- A. **Résumé** – a brief and accurate summary of educational and work experiences used when applying for a job. It is often the first impression

that a prospective employee makes on an employer. It may be sent as an attachment to an email

1. **Margins** – No less than .5 inches. Use white space uniformly to create a professional appearance and emphasize the content
2. **Components:**
  - a. **Identifying information** – name, address, phone number(s), email address
  - b. **Education**
    - i. Listed in chronological order beginning with the most recent
    - ii. If not graduated yet, list date of expected graduation
    - iii. Include courses enrolled that directly relate to the position sought
  - c. **Experience or Employment history** - Listed in chronological order, beginning with most recent
    - i. Use the term that is most descriptive on the content
      - (a) For example, someone who worked with his dad fixing cars would aptly describe their knowledge as experience
      - (b) Someone employed at Fast Lanes Auto Store would more aptly describe their knowledge as employment
    - ii. Include type of position, name and location of organization, dates of employment, and brief description of responsibilities
    - iii. Use action statements
    - iv. Experience may be keyed before education
  - d. **References** – Listed with permission of the reference
    - i. If included on the résumé, include name and contact information
    - ii. If not included on the résumé, a statement indicating that references will be provided upon request should be included
  - e. **Optional Information**
    - i. **Objective** – A concise statement of your purpose, usually addresses a specific job
    - ii. **Activities and interests**, such as reading, skiing, hiking, Boy Scouts, choir, and fishing, etc.

- iii. **Community service** such as volunteering at the local hospital or animal shelter, Big Brother, tutoring, etc.
- iv. **Awards and recognitions** that indicate leadership ability, service to others, expertise
- v. **Languages spoken** – especially applicable when applying to companies with international holdings and interests or in communities with diverse cultures

### 3. **Guidelines for Keying**

- a. Contact's name is usually keyed in large font in the header section, followed by his/her contact information, usually keyed in smaller text
- b. The sections are commonly divided into columns – headings on the left and descriptive text on the right
- c. Limit one page as often as possible
- d. Must be free of any errors
- e. Format and text should be easy to read and attractively presented
- f. Do not use a font size less than 11 or 12 pt
- g. Never use relatives or peers as references

B. A **business letter** is a form of communication used to convey a formal message to one or more parties

- Letters may be sent as an attachment to an email
  - A higher level of seriousness is needed than just a simple email
  - The document will be distributed to others
  - The document will be printed
- Examples of uses:
  - Company's communication to stockholders
  - Superintendent's communication to parents
  - Bank's communication to customers

1. **Margins** – Margins vary according to the amount of content

- a. In general, adjust the margins so that the letter has a uniform amount of white space at each margin and is slightly oriented to the top or centered
- b. Leave at least .5 inches below the letterhead

2. **Components** (in order):

- a. **Letterhead** (optional) – preprinted information in the header and sometimes in the footer that usually contains the

company name, address, email address, logo, and other contact information

- b. **Dateline** – the date the letter is written, spelled out, such as *April 30, 2010*, not 4-30-2010
- c. **Attention line** (optional) – keyed on the first line of the inside address and used to address a specific person or job (Sales Manager) within an organization
- d. **Inside address** – the name of the addressee, name of the business, street address, city, state abbreviation, and zip
- e. **Salutation** – the greeting, such as *Dear Mr. Cox*
- f. **Subject line** (optional)
  - i. Keyed below the salutation because it is considered part of the message
  - i. Key the word Subject in all caps, followed by a colon and the topic, also in all caps
  - ii. Used to give the reader a quick overview of the topic
- g. **Message** – the letter content. Key paragraphs in single space format with a double space between
- h. **Complimentary closing** – the goodbye, such as *Sincerely*
- i. **Company signature** (optional) – the keyed name of the company in all caps, placed a double space below the complimentary close
- j. **Writer's signature block** – the author's name and title, which may be keyed on one or two lines, depending on length
- k. **Reference initials** – the initials of the typist of the letter and sometimes the author as well (keyed first)
  - i. Example: bc/mw or BC/MW
  - ii. No punctuation is used with the initials
- l. **Enclosure notation** (optional) – indicates that another document is included with the letter. Sometimes the enclosures are identified. Example: Enclosure: *Résumé*
- m. **Copy notation** (optional) – indicates the names of other parties who have received copies of the letter. Example: cc Mrs. Dian Moon

### 3. **Punctuation styles**

- a. **Mixed punctuation** (standard) means that a colon is keyed after the salutation (Dear Mrs. May:) and a comma after the complimentary close (Sincerely,)

- b. **Open punctuation** means that no punctuation is used after the salutation or the complimentary close

4. **Format**

- a. In **block style**, all lines begin at the left margin
- b. In **modified block style**, the date and closure are keyed at center point (usually 6 tabs)

5. **Guidelines for keying**

- a. A quadruple space follows the date line, leaving three blank lines between the date and the inside address
- b. A double space follows the inside address, leaving one blank line between the inside address and the salutation
- c. A double space follows the salutation, leaving one blank line between the salutation and the body
- d. The body of the letter is single spaced, with a double space between paragraphs
- e. A double space precedes the complimentary close
- f. If the company signature is included in the letter, it is keyed a double space below the complimentary close and a quadruple space (three blank lines) above the writer's signature block
- g. If no company signature is included in the letter, the writer's signature block is keyed a quadruple space below the complimentary close
- h. A double space separates the writer's signature block from any remaining parts of the letter
- i. Reference initials, enclosure notation, copy notation, etc. are single or double spaced. Reference initials are not required when the writer is also the typist

C. **Personal business letter** – correspondence between an individual and another individual or a corporate entity

- 1. It can be sent as a hard copy or as an email attachment
- 2. Examples of use:
  - a. Formal thank you note
  - b. Letter of complaint
  - c. Letter of application to accompany a résumé
  - d. Any communication you wish to express in a formal manner representing yourself, not your company

3. A personal business letter is formatted according to the same guidelines as a business letter **AND** includes the return address of the author at the top of the document
- D. A **memo** is a form of communication used within an office, business, or organization
- Since the advent of email, formal memos have almost become obsolete; however, **they are used for interoffice communication that deals with subjects of permanent record**, such as a policy notice or a change in office procedures. Emails, on the other hand, are considered temporary communication.
  - May be sent as a hard copy, as an email, or as an email attachment
1. **Margins**
    - a. If keyed on letterhead stationery, allow .5 inches between the letterhead and the first line of the memo
    - b. In general, format the margins so that the memo has a uniform amount of white space at each margin and is slightly oriented to the top or centered

2. **Components:**

a. **Date**

- i. May be keyed first either at center point or at the left margin
- ii. Spell the date out – April 30, 2010, not 4/30/2010

b. **Headings**

- i. TO – addressee(s)
- ii. FROM – senders
- iii. DATE – if not keyed at the beginning
- iv. SUBJECT – brief summary of memo content

c. **Body** – message

d. **Writer's name and signature** (optional)

- i. Used to authenticate the memo
- ii. **OR** Author may authenticate by writing his/her initials beside his/her name in the headings section

e. **Special notations** (optional) – such as attachment or copy notation

3. **Guidelines for keying**

- a. The **basic headings**: TO or MEMO TO, FROM, and, SUBJECT or RE, are most often keyed in all caps and bold
- b. The information to the right of each heading is vertically aligned (usually one or two tabs after each heading)
- c. When addressed to more than two or three recipients (or from multiple authors), vertically align each name; otherwise, separate each name by a comma and fit on one line
- d. Body begins a double space below the last heading
- e. The writer's name or initials may be keyed a double space below the last line of the body (optional)
- f. Paragraphs are single spaced with a double space between
- g. Paragraphs may be blocked or indented

E. An **agenda** –a list of items to be discussed or acted upon, prepared before meetings, events, and conferences

1. **Margins**

- a. If the agenda is very short, it may be centered horizontally and/or vertically
- b. Adjust margins (top and side) so that the agenda is attractively presented on the page

- c. If letterhead stationery is used, leave .5 inches between the letterhead and the beginning of the agenda
- 2. **Components:**
  - a. **Heading section** – the **organization name, date, location,** and **time** of the meeting centered at top
  - b. **Body** – time slots, topics, and speakers/presenters
- 3. **Guidelines for keying**
  - a. May include columns of **times, topics, speakers,** and **locations** or may simply be represented as a list of items
  - b. May be formatted with dot leader tabs to control the left-to-right flow of the text
  - c. Format varies according to the needs and preferences of each organization
  - d. If the agenda includes a list of incomplete sentences, no periods are required
  - e. Use a double space between numbered items
  - f. If the meeting or conference will last more than one day, list the day and date at the beginning of each section in bold
  - g. For agendas in column format, use the table feature
- F. **Minutes** – used to describe the discussions, decisions, and actions that **occurred** during a business meeting
  - 1. In some cases, the minutes are detailed to cover every point of discussion because they may be used later for legal justification and documentation
    - a. A company meeting of stockholders would require detailed formal minutes including the pros and cons of each discussion point
    - b. The minutes of the State Board of Education would also require detailed minutes
    - c. A meeting of the PTSA Grounds Committee to decide where to plant shrubs would require informal minutes
  - 2. **Margins**
    - a. Adjust margins (top and side) so that the document is attractively presented on the page
    - b. If letterhead stationery is used, leave .5 inches between the letterhead and the beginning of the document

3. **Components:**

a. **Heading information**

- i. **Name of organization** or committee
- ii. **Type of meeting**, for example Regular Board Meeting
- iii. **Date and time** of meeting
- iv. **Location** of the meeting

b. **Call to Order** – formal declaration by the chairperson of the meeting that it has officially begun

c. **Approval of Minutes** – review of previous minutes by board members

- i. Minutes may be emailed to board members prior to meeting to save time
- ii. Recommended edits and corrections are made during the approval of the minutes

d. **Committee Reports** – progress reports presented by sub-committee chairs

e. **Old Business** – unresolved discussions from a previous meeting

f. **New Business** – new topics and issues

g. **Adjournment** – notation of who adjourned the meeting

h. **Signature line** for recording secretary

4. **Guidelines for keying**

a. Center the heading information and key in initial caps and bold at the beginning of the document

b. The body of the minutes should contain a separate paragraph for each subject

c. Single space within paragraphs and double space between

G. **Itinerary** – used to indicate travel arrangements. Some itineraries include minute details about each day, while others simply list departure and arrival information including airline, departure/arrival gate, dates, and times

1. **Margins**

a. Adjust margins (top and side) so that the document is attractively presented on the page

b. If letterhead stationery is used, leave .5 inches between the letterhead and the beginning of the document

2. **Components:**

- a. **Name** of traveler
- b. **Date and time** of departure
- c. **Departure information** – if by air, name of airport(s), gate numbers and flight numbers, airline, plane type, seat assignment, number of stops or layovers, flight change information, etc.
- d. **Lodging information** including date and time of check-in and check-out, type of room, and amenities provided
- e. **Meeting times and locations**, contacts, travel arrangements to and from meetings, times, and locations
- f. **Return times** – same as departure information **and** transportation to departure site and to home from airport
- g. **Area attractions** and other tourist-type information (optional)

3. **Guidelines for keying**

- a. Easiest to key when table feature is used
- b. Double space the heading information (Itinerary for Ken Smith April 1-4, 2010) and key it in bold with the word Itinerary keyed in all caps, small caps, or initial caps
- c. If the trip covers more than one day, use side headings in bold to separate each
- d. Align the times at the colon
- e. Double space between each item
- f. Include the names and phone numbers of airports, contacts, hotels, conference locations, and the flight numbers
- g. If there are two airports in one city, provide the name of the airport

H. **Research report** – a multi-page document that usually contains several sub-topics of information related to one main topic

- MLA is a style used for reports that dictates specific punctuation styles, abbreviation uses, headings, margins, and arrangement of text
- MLA format includes specific guidelines on the use parenthetical citations and works cited pages for the purpose of providing readers easy access to references used in the report
- These formatting guidelines are in accordance with the MLA style

- (Optional) View MLA PowerPoints at <http://owl.english.purdue.edu/workshops/pp/MLA.ppt#256,1>, Cross-referencing: Using MLA Format

1. **Margins** – All margins should be set to one inch

2. **Components**

- Title page** (optional) – includes the, the name of the document, writer's name, teacher/professor's name (optional), and date of publication
- Title** – (required) – the identifying information keyed in the top left margin of the report
- Header** –writer's last name and the page number
- Body** – the content
- Parenthetical citations** –reference note keyed in the body of the report
- Endnotes/Footnotes** – another type of reference format used in reports, but recommended for use only when necessary to add commentary or clarify
  - Endnotes are typically used to add commentary
  - References are used to cite a source
- Works Cited** – a complete listing of references cited parenthetically in the report and keyed on a separate page
- Notes** – a complete list of resources and references used to accompany endnotes and keyed on a separate page

3. **Guidelines for Keying**

- Title page** (optional)
  - Center the title in the top third portion of the page
  - Double space the writer's name and professor's name and center the two lines in the middle of the page
  - Center the date in the bottom third portion of the page
- Title** – in the upper left-hand corner of the first page, key the writer's name, the teacher/professor's name, the course name, and the date in double space format
  - (Optional) – Include email address and phone number
- Header** – formatted to include the writer's last name followed by one space and the page number in the .5 inch top right margin
  - May be omitted on the first page
  - Example: Downey 1

- d. **Body**
  - i. Double-space all lines
  - ii. Use a legible font size
  - iii. Leave only one space after periods or other punctuation marks
  - iv. Indent the first line of a paragraph .5" from the left margin
  - v. Use either italics or underlining for the titles of longer works and, only when absolutely necessary, providing emphasis
  - vi. Double space again after the title line and center the title of the report
  - vii. Double space between the title and the first line of the text
- e. **Paraphrased citations** – keyed immediately following a quote or referenced source in the body of a report
  - i. Includes the author's name and page number as in this example: (Lowery 45)
  - ii. The complete reference is keyed in the works cited section of the report
- f. **Endnotes/Footnotes** – should be used only sparingly and for necessary clarifying commentary
  - i. Indicated by a superscript within the report body and keyed after any punctuation in the reference to which it refers (with the exception of a dash or hyphen)
  - ii. Footnotes (notes that appear at the bottom of the page of the body of the report) should be keyed in single space, hanging indent format with a double space separating each additional footnote
  - iii. When endnotes/footnotes are used, they must be referenced separately on a **notes** page
- g. **Works cited** –used to accompany paraphrased citations
  - i. Keyed on separate page with the same margins as the report
  - ii. Includes header (last name, page number)
  - iii. Label the page Works Cited and center the title at the top 2" margin of the page
  - iv. Keyed in hanging indent format and double spaced
  - v. Listed in alpha order by author's last name

- h. **Notes** – list of resources and references when footnotes or endnotes are used
  - i. Keyed on separate page with the same margins as the report
  - ii. Includes header (last name, page number)
  - iii. Label the page Notes and center the title at the top 2” margin of the page
  - iv. Keyed in hanging indent format and double spaced
  - v. Listed in chronological order by superscript number
- I. **Table of contents** – used to accompany a report, document, or manuscript to list the topics and subtopics in the order in which they occur
  - 1. **Margins** – same as the document it accompanies
  - 2. **Components**
    - a. Table of Contents (title)
    - b. List of topics and subtopics and their respective pages
    - c. Page number – in roman numeral style at the bottom of the page
  - 3. **Guidelines for keying**
    - a. A table of contents may be prepared using the software’s automatic feature or manually
    - b. Center the heading Table of Contents in all caps and bold 2 inches from the top of the page. Use a double or triple space after the title
    - c. Double space all entries
    - d. The content of the table of contents is a list of each element of the report or document following the table of contents
    - e. Key each element at the left margin
    - f. Set a right dot leader tab and key the corresponding page number in the right margin
    - g. Subtopics within a topic should be indented an additional .5 spaces from the left
    - h. Include a page number in roman numeral format in the bottom center of each page
    - i. Single space multiple-line entries
    - j. Key entries in initial caps
    - k. Use a double or triple space before the appendix listing on the table of contents

- I. Double space the items at the end of the report, such as the appendices and bibliography
- J. **News/press release** – issued by an organization to emphasize specific information that it considers important. It is sent to members of the media and other stakeholders for the purpose of spreading the information to the public quickly.
  1. **Margins** – no less than .5 inches
  2. **Components** of a News/Press Release
    - a. **The heading** News Release, For Immediate Release, or Press Release
    - b. **Date, time, location** (city) of event
    - c. **Description** of the event
  3. **Guidelines for Keying**
    - a. A news release template is available in many word processing software programs or may be keyed manually
    - b. The **heading** of the press/news release includes the company name and address and the phrase News Release
    - c. The **contact information** includes the representative's name, fax number, phone number, and email address
    - d. A **title** may be keyed a double or triple space below the contact information
    - e. The message of the news/press release begins with the **city and state and date** of the release keyed in initial caps and bold as a paragraph heading ending with a colon
    - f. The **body** of the news/press is single or double spaced and paragraphs are indented
      - i. Press releases online:
        - (a) <http://www.fda.gov/bbs/topics/NEWS/2007/NEW01590.html>
        - (b) [http://www.peer.org/news/news\\_id.php?row\\_id=801](http://www.peer.org/news/news_id.php?row_id=801)
      - ii. Online templates are available at <http://office.microsoft.com/en-us/templates/results.aspx?qu=news+release&av=TPL000>
    - g. At the end of the document, the symbols **###** are keyed to indicate the **close** of the message

- II. **Software support features** are tools inherent in a software package that add efficiency and reduce unnecessary duplication of repetitive tasks in document processing
- A. **Mail merge** is a feature that allows a user to create mass mailings of letters, mailing labels, and other documents and personalize the information in each
  - B. **Macros** are tools that allow a user to program repetitive tasks into the computer's memory so that they can be quickly accomplished with the touch of a couple of keys that the user has selected
  - C. **Track changes** is a feature used when editing documents that allows the user and other editors to view changes that have been made to the document
  - D. **Search and replace** is a feature that allows global edits to a document
  - E. **Styles** are global formats for headings and other text within a document
  - F. The **format painter** is a feature that allows a user to copy the format of text to other areas in a document
  - G. The **thesaurus** is a handy feature that provides alternative word choices in a document
  - H. **Comments** is a feature used to add editorial remarks to a document
  - I. **Templates and Wizards** are features used to automate the creation of documents. A template contains fields that are completed by the user. A wizard uses a template and adds helpful prompts for the user