

Business Documents & Technology

- Teacher Notes

Directions:

Fill in the blanks.

Business Documents Segment

1. Steps to Document Creation

- Include:
 - plan
 - gather information
 - **conduct** research
 - outline
 - write
 - create the first **draft** of the document

2. Steps to Document Creation

- Include:
 - revise
 - check the layout and format
 - check for **technical** errors
 - make corrections
 - edit
 - perform a **final** spelling/grammar check
 - make corrections
 - finalize

3. Tips for Writing

- Include:
 - knowing the purpose (why) and the subject (who) of the document being **created**
 - always focusing on the receiver and show empathy
 - keeping it **simple**, rather than being wordy or technical
 - ensuring the message is understandable and concise

4. Professional Writing Skills

- Are demonstrated by:
 - sending messages promptly
 - using **quality** paper
 - ensuring accurate formatting of documents
 - using high printing quality
 - checking for and removing all **misspellings** and grammatical errors

Business Documents & Technology

- Teacher Notes

5. Types of Messages

- Include:
 - positive
 - **negative**
 - persuasive

Important: Always make sure the type of message matches the response the receiver is looking for.

6. Positive Messages

- Are also known as goodwill messages
- Are **thoughtful** messages intended to generate feelings of support and approval
 - usually bearing good or neutral news
- Are designed to create a **favorable** impression of the writer and his/her company
- Examples include:
 - congratulations, appreciation and acceptance messages, job offers

7. Positive Messages

- Should be written using the direct approach
 - straightforward **strategy** which leads with the main point
- Include:
 - opening
 - announce information
 - explanation
 - present details and **supporting** information
 - close
 - build goodwill by being sincere and friendly

8. Negative Messages

- Are messages bearing bad news
- Can create a bad impression of the writer and his/her company
- Must be worded sensitively using **positive** rather than negative words
- Examples include:
 - order/credit refusal
 - **employment** denials
 - poor evaluation/termination messages

Business Documents & Technology

- Teacher Notes

9. Negative Messages

- Should be written using the indirect approach
 - subtle strategy which leads with explanation and **reasoning**
- Include:
 - opening
 - use **buffer**— gentle openings providing a cushion before bad news is presented
 - explanation
 - provide information and logical reasoning

10. Negative Messages

- Include:
 - negative Information
 - relate **explanation** to decision
 - provide alternatives if available
 - close
 - build **goodwill** by personalizing and staying away from negative subject

11. Persuasive Messages

- Are designed to make the reader want to take action immediately
- Must contain interesting and **persuasive** information
- Should be written using an indirect approach
 - gain attention in the beginning then proceed with explanation and main point
- Examples include:
 - sales messages, requests and **collection** messages, application cover letters

12. Letter Formatting

- Includes:
 - equal margins
 - usually the default margins set by the word **processor**
 - one inch side, top and bottom margins, if not set
 - side **margins** can be increased for short letters

Business Documents & Technology

- Teacher Notes

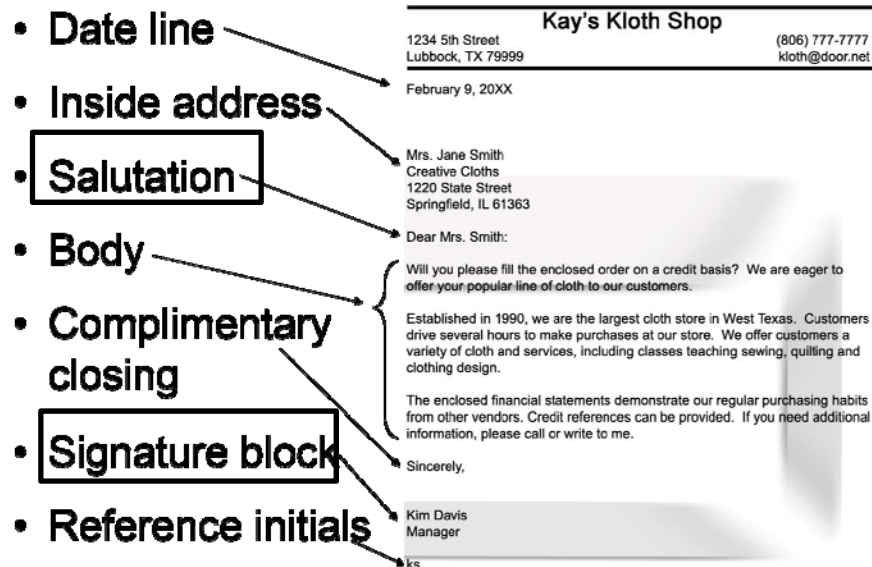
13. Letter Formatting

- Includes:
 - text alignment options
 - all text **aligned** on the left side with a jagged right side
 - preferred by most companies
 - gives more personal **appearance**
 - justified with left and right sides being aligned
 - gives a computer-generated appearance

14. Letter Formatting

- Includes:
 - spacing
 - once after a period, question mark, colon or exclamation point
 - once after a comma or **semicolon**
 - once after a period following an initial or abbreviation
 - mixed punctuation
 - colon after **salutation**
 - comma after the complimentary close
 - see block letter example

15. Standard Block Format

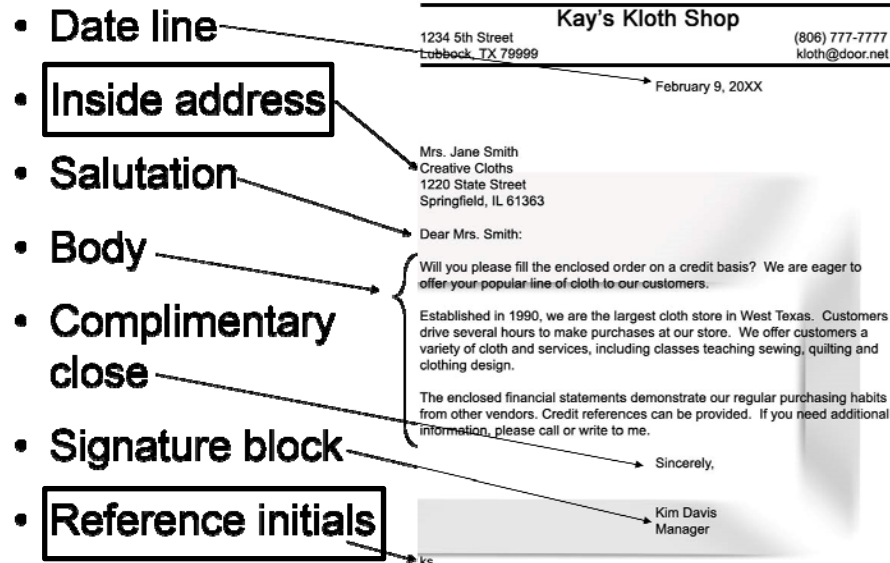


Business Documents & Technology

- Teacher Notes

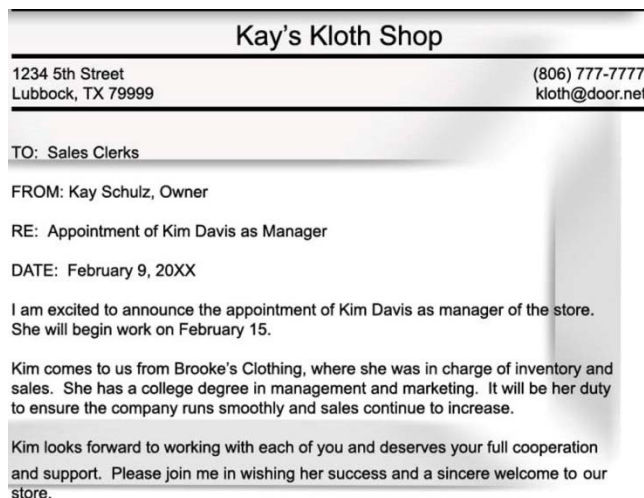
16. Modified Block Format

- **Date line** → February 9, 20XX
- **Inside address** → Mrs. Jane Smith
Creative Cloths
1220 State Street
Springfield, IL 61363
- **Salutation** → Dear Mrs. Smith:
- **Body** → Will you please fill the enclosed order on a credit basis? We are eager to offer your popular line of cloth to our customers.
Established in 1990, we are the largest cloth store in West Texas. Customers drive several hours to make purchases at our store. We offer customers a variety of cloth and services, including classes teaching sewing, quilting and clothing design.
The enclosed financial statements demonstrate our regular purchasing habits from other vendors. Credit references can be provided. If you need additional information, please call or write to me.
- **Complimentary close** → Sincerely,
- **Signature block** → Kim Davis
Manager
- **Reference initials** → ks



17. Memorandum Format

- Is used for intra-company communication



Kay's Kloth Shop
1234 5th Street
Lubbock, TX 79999
(806) 777-7777
kloth@door.net

TO: Sales Clerks

FROM: Kay Schulz, Owner

RE: Appointment of Kim Davis as Manager

DATE: February 9, 20XX

I am excited to announce the appointment of Kim Davis as manager of the store. She will begin work on February 15.

Kim comes to us from Brooke's Clothing, where she was in charge of inventory and sales. She has a college degree in management and marketing. It will be her duty to ensure the company runs smoothly and sales continue to increase.

Kim looks forward to working with each of you and deserves your full cooperation and support. Please join me in wishing her success and a sincere welcome to our store.

- Teacher Notes

- Include:
 - Title page
 - Letter or memo of transmittal
 - Table of contents
 - Table of figures
 - Executive **summary**
 - Report text
 - introduction
 - body
 - conclusion
 - **citations**/bibliography
 - appendices

<p>XXXX XXXXXXXX XXXXXXXXXXXX XXXXXXXXXXXX XXXXXXXXXXXX XXXXXXXX XXXXXXXXXX XXXXXXXXXXXX XXXXXXXXXXXXXXXX XXXXXXX XXXX .</p> <p>XXXXXXXXXXXX XXXXXXXXXXXX XXXXXXXXXXXX XXXXXXXXXXXXXXX XXXX XXXXXXXXXX XXXXXXX XXXX XXXXXXXXXXXX XXXX XXXXXXXXXXXXXXXX.</p> <p>First-Degree Heading</p> <p>XXXXXXXXXXXX XXXXXXXXXXXXXXX XXXXXXXXXXXX XXXXXXXXXXXXXXX XXX XXXXXXXXXX XXXXXXX XXXX XXXXXXXXXXX XXXX XXXXXXXXXXXXXXX XXXXXXX.</p> <p><u>Second-Degree Heading</u></p> <p>XXXXXXXXXXXX XXXXXXX XXXX XXXXXXXXXXX XXXXXXX XXXXX XXXXX XXX XXXXXXXXXXX XXXXXXXXXXXXXXX XXXXXXXXXXXXXXX XXXX XXXX.</p> <p><u>Second-Degree Heading</u></p> <p>XXXXXXXXXXXX XXXXXXX XXXX XXXXXXXXXXX XXXXXXX XXXXX XXXXX XXX XXXXXXXXXXX XXXXXXXXXXXXXXX XXXXXXXXXXXXXXX XXXX XXXX.</p> <p><u>Third-degree heading.</u> XXXXXXXXXXX XXXXXXX XXX XXXXXXX XXXXX XXX XXXXXXXXXXX XXXXXXX XXXXXXXXXXX XXXX XXXXXXXXXXX XXXX.</p> <p><u>Third-degree heading.</u> XXXXXXXXXXX XXXXXXX XXX XXXXXXX XXXXX XXX XXXXXXXXXXX XXXXXXX XXXXXXXXXXX XXXX XXXXXXX XXXX.</p> <p>First-Degree Heading</p>			
<p>XXXX XXXXXXX XXXXXXXXXXXX XXXXXXXXXXXXXXX XXXXXXXXXXXX XXXXXXX XXXXXXXXXX XXXXXXXXXXX XXXXXXXXXXXXXXX XXXXXXX XXXX XXXXXXXX.</p> <p>XXXXXXXXXXXX XXXXXXXXXXX XXXXXXXXXXXXXXX XXXXXXXXXXXXXXX XXX. XXXXXXXXXXXX XXXXXXXXXXX XXXXXXXXXXXXXXX XXXXXXXXXXXXXXX XXX.</p> <p><u>Second-Degree Heading</u></p> <p>XXXXXXXXXXXX XXXXXXX XXXX XXXXXXXXXXX XXXXXXX XXXXX XXXXX XXX XXXXXXXXXXX XXXXXXXXXXXXXXX XXXXXXXXXXXXXXX XXXX XXXX.</p> <p><u>Second-Degree Heading</u></p> <p>XXXXXXXXXXXX XXXXXXX XXXX XXXXXXXXXXX XXXXXXX XXXXX XXXXX XXX XXXXXXXXXXX XXXXXXXXXXXXXXX XXXXXXXXXXXXXXX XXXX XXXX.</p> <p><u>Third-degree heading.</u> XXXXXXXXXXX XXXXXXX XXX XXXXXXX XXXXX XXX XXXXXXXXXXX XXXXXXX XXXXXXXXXXX XXXX XXXXXXXXXXX XXXX.</p> <p><u>Third-degree heading.</u> XXXXXXXXXXX XXXXXXX XXX XXXXXXX XXXXX XXX XXXXXXXXXXX XXXXXXX XXXXXXXXXXX XXXX XXXXXXX XXXX.</p> <p>First-Degree Heading</p>			

Business Documents & Technology

- Teacher Notes

20. Graphics in Written Documents

- Allows:
 - data to be presented in a simplified way by using graphics
 - graphics should only be used to explain and **clarify** difficult data, not for enhancement purposes
- Includes:
 - tables
 - charts
 - maps
 - **diagrams**
 - Flowcharts

21. Graphics in Written Documents

- Should be inserted into text after their introduction
 - there should be written sentences immediately before or after the graphic to **summarize** its meaning
- Do not simply state the figure **number** and title

Technology Segment

1. Technology

- Is essential for businesses of all types to regulate and optimize business **functions** and communications
- Helps businesses operate more **efficiently** and effectively

2. Technology in Business

- Includes:
 - Internet
 - **wireless** communications
 - phone systems, fax machines, e-mail, instant message, videoconferencing, etc.
 - computer **networking**
 - local area network (LAN)
 - school computer lab or business offices
 - wide area network (WAN)
 - has two or more interconnected LANs
 - metropolitan area network (MAN)
 - serves a town or city

Business Documents & Technology

- Teacher Notes

3. Communication Methods

- Include:
 - calling
 - e-mail
 - faxing

4. Communication Procedures

- Include:
 - prepare
 - write down key points
 - identify yourself
 - first and last name, job title if applicable
 - identify purpose
 - politely and directly
 - take time to listen
 - give other party time to ask questions
 - review
 - make sure both parties agree on what should happen next, if additional communication is needed set up specific day and time

5. Log-in Procedure

- Includes:
 - typing in username
 - typing in password
 - logging out every time

6. Log-in Tips

- For work computers can include:
 - always remember username and password
 - never give out password
 - reset password regularly
- Are meant to uphold system security by managing access to files and operations

7. Troubleshooting

- Is the process of solving or determining a problem or an issue, often involves the process of elimination
 - identifying the problem by first deciding what is not wrong in a step-by-step manner

Business Documents & Technology

- Teacher Notes

8. Troubleshooting Procedures

- Include:
 - defining the problem
 - **eliminating** possible causes
 - formulating a hypothesis about the cause
 - testing **hypothesis**
 - solving the problem

9. Defining the Problem

- Involves determining what is going on
 - is there an **error** message
 - is the screen frozen
 - has there been a **power** outage
 - is there new hardware or software installed

10. Eliminate Possible Causes

- By using the facts and evidence to **progressively** exclude possible causes and **identify** the root of the problem

11. Formulating & Testing a Hypothesis

- Occurs after **narrowing** down possible problem source
- Can be done more than once if changing possible **causes** is required

12. Solving the Problem

- Is the final step in the process
 - make sure to **communicate** to all parties that the problem has been fixed
- Can be done by
 - researching error messages
 - **breaking** larger problems into smaller ones and fixing them one by one
 - restarting programs or computer

Business Documents & Technology

- Teacher Notes

13. Technology Safety & Security Policies

- May concern:
 - computer and software use
 - e-mail
 - Internet
 - instant messaging
 - blogs and personal posting
 - cell phone
 - portable computing device
 - camera phone

14. Technology Safety & Security Policies

- Can protect business by:
 - protecting trade secrets
 - protecting employer, customer and employee privacy
 - managing electronic documents and tools
 - limiting liability for employee misconduct
 - conserving company resources
 - preventing e-harassment

15. Technology Safety & Security Policies

- Usually include information stating:
 - do not give out passwords
 - always log out
 - never visit unprotected web pages
 - keep personal information off company computers

16. Ergonomic Techniques

- Deal with designing and arranging equipment so people can use technology easily and safely
- Can include guidelines for safe computer use, gaming, smartphones, tablets, etc.

Business Documents & Technology

- Teacher Notes

17. Ergonomic Techniques

- Include:
 - sit up tall, push hips all the way back in chair, have feet flat on the floor, have chair at 100 to 110 degree angle
 - position **keyboard** directly in front of chair, even with the front edge of the desk and at elbow height so wrist movement is not restricted
 - place monitor 18 to 24 inches from eyes, with top edge of display screen at eye level
 - take short breaks every hour to **relax** the neck, shoulders, arms, wrists and fingers