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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.

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?

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?

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.

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

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

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.

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.

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

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)

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.

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.

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.

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.

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.

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.

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.

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

- 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.