



UNIT-2

Professional Documents

Learning Outcomes

By the end of this unit the learner will be able to:

Unit 2

Professional Documents

Business Documents

Appearance

Despite constantly improving forms of communication such as email, the business letter still exerts enormous influence and deserves your close attention. Business letters are more formal and personal than email. They are also more private.

Very few customers of a business ever see the home office or a branch office; this is often true even of small businesses. What customers do see is company correspondence. An untidy or ungrammatical letter gives the instant impression that the company's product or service is equally flawed. On the other hand, upon receiving a handsomely spaced, well-constructed, and well-organized letter, a customer unconsciously assumes it has come from an up-to-date, well-organized, and successful business.

Letter writing occupies at least one-third of all office work, and good writing is the most effective advertisement of your capability. Any skills you can acquire or improve in this area do double duty: They help you work more quickly and **effective-ly** while advancing your career.

Besides the skills you need for your own writing, you need to learn techniques of letter writing to handle your boss's correspondence. Most successful businesspeople have already mastered the mechanics of language, but many in authoritative positions lack such skills. They rely on their administrative assistants to see that their letters are satisfactory.

Any letter that comes from your keyboard—whether composed by you or your employer—must have a businesslike appearance that does not distract from the message it has to convey. The letter must be neat and symmetrical, and it must not have any typographical, grammatical, or spelling errors. Its language should clearly and simply go to the heart of the matter discussed. Its language and appearance should also be within the conventions of the commercial world. That is the reason each company selects its own style for presentation to its public.

The way in which a company is known to its customers, its good name, its reputation, and the quality of its products or services all constitute the corporate image. Image is very important, and many companies spend fortunes to have the image instantly recognized by the consumer, so no matter what style the company uses, use it consistently. This helps make the company's correspondence characteristically its own. That consistency also translates into dependability in the customer's mind.

Paragraphing

If you are new to the company, it's not likely you'll be invited to decide on which style of letter to use. A certain style may have already been selected long ago after various experiments. In accordance with that style, you'll be instructed to indent paragraphs or to block them and to put a double space between paragraphs that are single-spaced. Your boss will no doubt also tell you his or her way of closing a letter, perhaps with the company's name and his or her signature with title below. You should conform to your employer's preference without question.

At the same time, you'll be told about open punctuation (no marks at the end of each line outside the text of the letter) or closed punctuation (marks after the date line, after each line of the addressee's name and address, after the complimentary close, and after the signature). Closed punctuation is usually used with blocked paragraphs.

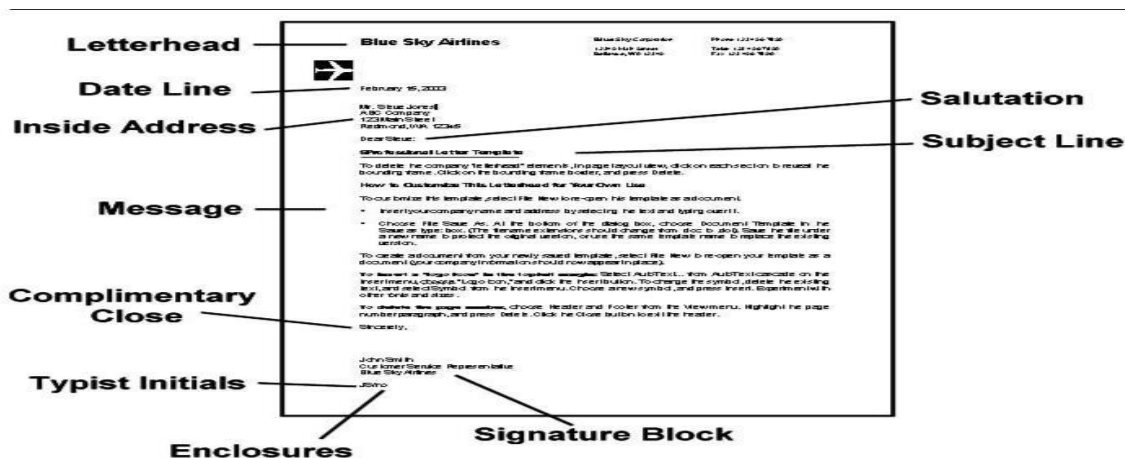
Parts of a Business Letter

The various parts of a business letter (see **Figure 2-1**) include:

- **Date line**—two to six lines below the last line of the printed letterhead. The date should be written out in this form: January 1, 2012.
- **Reference line**—a numerical file number, invoice number, policy number, or order number should appear on a new line below the date.
- **Special mailing notations**—special notations such as “confidential” should appear two lines below the date.
- **Inside address**—should include the addressee's title and full name, business title, business name, and full address
- **Attention line**—if the letter is not addressed to a specific person, skip one space after the inside address and add, “Attention: _____.” You can make the letter go to the attention of a department.
- **Salutation**—one line after the attention line or the inside address. Examples include: Dear ————, Ladies and Gentlemen, Dear Sir or Madam, Dear [company name].
- **Subject line**—gives an overview of what the letter is about. Can be used in place of a salutation or reference line.
- **Message**—the body of your letter with paragraph breaks; optional indentations for paragraphs, bullet lists, and number lists.
- **Complimentary close**—appears two lines below the last line of the message. Either left justified or five spaces to the right of center.

- **Signature block**—justified with the complimentary close with options of typed name and title, signature, or just signature
- **Identification initials**—the initials of the typist appears left-justified two spaces below the signature block.
- **Enclosure notation**—located with the identification initials or in place of them with a notation such as: enc, encl, enclosures (3), 3 encs.
- **Copy notation**—left-justified two lines below identification initials with the notation: cc: [person’s full name or initials].
- **Postscript**—two spaces below the last text on the page with a P.S. and then a short sentence.

FIGURE 2-1 Parts of a Business Letter



Beginning the Letter

The Date Line

Some offices show the standard date line near the body of the letter, ending at the right margin two spaces above the name of the addressee, which is written flush with the left margin. If the centered date line is chosen, it is placed two spaces below the letterhead as though it's part of the letterhead and centered exactly. This is an effective and well-balanced look if the company name and address in the letterhead fall in the center. If the letterhead is spread out across the whole top of the page ending at the right margin, then the standard date line seems more graceful and more balanced. When paper without a letterhead is used, the date line must be standard and must be a part of the three-line heading.

This consists of the address of the writer and the date of the letter:

1501 Guadalupe Street

Austin, Texas 78702

May 27, 2012

Never place the name of the writer in the typewritten heading of the letter, for that belongs only at the end of the letter.

In typing the date line, never abbreviate the name of the month or use figures for it. Also, use numerals only for the day of the month; never add nd, d, rd, st, or th to the numerals. These sounds are heard but are never written.

Wrong	Right
May 27th, 2012	May 27, 2012
June 22d, 2012	June 22, 2012

The Inside Address

The name and address of the addressee should be exactly as typed on the envelope. If a street address is long enough to require two lines, place the less important of the two above:

Student Union Building

Northwestern State Teachers College

Alva, Oklahoma 76021

If an individual in a company is addressed, show the individual's name (and title) with the company's name below that, single spaced. If there is a long address that must be carried over to a second line, indent the second line three spaces:

Mr. Rick Ritenour, President
 San Francisco National Bank and
 Mortgage Association
 1200 Market Street
 San Francisco, California 99001

Never abbreviate part of the company name unless the company's registered name uses an abbreviation (Co., Inc., or &) and such abbreviation is shown on the company's official letterhead.

Figures are used for all house numbers except "one" (which is spelled out). If there is a numerical street number, separate the house number and street number by a dash:

3780 87 Street (Note: no *th* after 87)

Names of cities are never abbreviated; the names of states are also never abbreviated. There is one exception: Use the official U.S. Postal Service postal state abbreviations on the envelope address. (See Chapter 4 on "Mail Services and Shipping.")

Never use an abbreviation such as a percentage mark for "care of"; always spell the words out. Never use "care of" before a hotel name if the addressee is a guest there, and never use it before a company name if the addressee is employed there. However, if the addressee is temporarily receiving mail at the office of the company, "care of" may be used before the company name:

Mr. Steve Eichman
 Care of The Rockwell Corporation
 60 Wall Street
 New York, New York 10022

Titles

An individual's name is always preceded by a title—for example, Mr., Ms., Mrs., Miss, Dr., or Col. It's permissible to place initials denoting a degree after the name of an addressee; in that case, always omit the beginning title:

Wrong

Dr. Gary K. Wilson, Ph.D.

Right

Gary K. Wilson, Ph.D.

Reverend and Honorable are titles of respect and are preceded by the word *The*.

The Mr. is omitted:

Wrong

Rev. John Wilson

Reverend Jim Seckman

Right

The Rev. John Wilson

The Reverend Jim Seckman

Women and Men

In addressing a woman, it's useful to refer to previous correspondence from the individual to see whether she included a courtesy title when she typed or signed her name. If you have no previous correspondence, use these general guidelines: Miss is used for an unmarried woman; Mrs. is used with her husband's full name (if known) for a married woman or a widow. If a divorcee retains her married name, use Mrs. plus her own name, not her husband's. Ms. is used in any of the above cases if the woman prefers it; it's also used if you do not know the woman's marital status or if you're addressing a divorcee who has resumed her maiden name.

Address a professional woman by her title, followed by her given and last name:

Dr. Bernice Wilson

The previous custom was to use Mr. as the title when the gender of the addressee was in doubt. The current custom, to avoid giving offense, is more likely to use the addressee's full name without a title, in both the address and the salutation:

Dear Toby Wilson

However, if the letter has some importance, it's worth making a quick call to the other party to get the proper title. Simply say to whoever answers the telephone: "I'm addressing a letter to Pat Richardson. Is that Mr. Richardson or Ms.?" This can save you and your employer much embarrassment later on.

Business Titles

Business titles are never abbreviated:

Wrong

Mr. Mark Giddens, Sr. Ed.

Ms. Julie Seckman, Asst. Mgr.

Right

Mr. Mark Giddens, Senior Editor

Ms. Julie Seckman, Assistant Manager

When you are writing to a person holding more than one office within a company, use the highest title unless you are replying to a specific letter signed by him or her under another title, as applying to the subject covered. When you are writing to a department of a company, rather than to a person

within the company, place the company name on the first line and the department on the second line:

MB's Department Store

Electronics Department

120 Irving Mall

Irving, Texas 76022

Attention Line

An **attention line** refers the letter to the person or department in charge of the situation covered. The word Attention is followed by the name of the individual or department. Do not abbreviate the word Attention or follow it with a colon.

The attention line is placed two spaces below the last line of the name and address of the addressee, either flush with the left margin of the letter or in the center of the page when paragraphs are blocked. When paragraphs are indented, the attention line is placed in the center of the page.

The attention line is never used in a letter to an individual; it is used only in a letter having a plural addressee, in which case the letter is written to the entire company and not to the person named in the attention line. The salutation must always agree (singular or plural) with the name of the addressee, not with the name on the attention line. For example:

Johnson Smith & Company, Inc.

1500 Main Street

Greenville, Texas 75401

Attention Mr. Horace Wauson

Gentlemen:

Salutation

The **salutation** is typed two spaces below the addressee's address or the attention line, flush with the left margin. The first word of the salutation begins with a capital, as does the name of the addressee. In business letters, the salutation is followed by a colon. In personal letters, the salutation is followed by a comma:

Dear Governor Thompson:

My Dear Mrs. Thomas:

Dear Jane,

Sometimes you'll be required to write a letter addressed to no particular person or company (such as a letter of recommendation); then you use capitals for the salutation:

TO WHOM IT MAY CONCERN:

Subject Line

The **subject line** of a letter is an informal way of categorizing or titling the a letter. Many letters in business must begin with a subject line after the salutation, a valuable aid in the distribution of mail that also facilitates filing. The subject line can be centered, but when the paragraphs are blocked, it is flush with the left margin.

Do not type "Re" or "Subject" before the subject line. Underline the subject line, but if it occupies more than one line, underline only the bottom line, letting the line extend the length of the longest line in the subject.

Be sure to word the subject line so that it is helpful. If the letter is about an order of silk, a subject line reading simply "Silk" would contribute nothing. If, however, the subject line should read,

Silk Returned, Our Shipping Order 8939

The clerk opening the letter could promptly route it to the person within the organization best able to reply.

Contents

With the body of the letter, first consider its appearance. You must judge how long the letter will be and how much space it will occupy in order to place it on the page as within a picture frame—never too high, never too low, always with proper side **mar-gins**. If you create the letter with word processing software, you can add spaces to the top of the letter or change the page margins after you have written the letter.

The body of the letter should be brief and straightforward. The letter should have the same ease as a personal conversation. Although you must write whatever your boss dictates, many times while typing you can ease the language a bit to improve its impression on the reader; it's possible to do this with just a word or two more or less that won't call attention to any change. Of course, you should always have your boss approve your revisions. It's your responsibility to see that the letter going forth is creditable in every way to your employer's interests.

The length of the letter should be in accordance with its importance. If the letter is too short, it may have a curt tone and may seem to slight the recipient. If the letter is too long, the recipient's attention may wander after the first page, and he or she may not read the letter in its entirety.

Closing the Letter

Complimentary Close

When the salutation has been "Dear Sir" or "My Dear Sir," no personal connection exists between the writer and the recipient. Thus, the complimentary closing can be "Yours truly" or "Very truly yours." "Sincerely" or "Sincerely yours" is appropriate when there is an established personal as well as a business relationship, but it is used only in letters to individuals, never to a company. "Respectfully yours" appears only on letters addressed to a person of acknowledged authority or in letters of great formality.

Avoid the use of such complimentary closes as "Yours for lower prices" or "I remain" and other hanging phrases. In addition, "Cordially yours" is not suitable in a business letter. It is often used but this is incorrect since the phrase is too familiar for business. Avoid it.

The Signature

If in the body of the letter the writer has referred to we, us, or ours, the company—and not an individual in the company—is writing the letter. Consequently, the signature would then consist of the typed name of the company under the complimentary close, the space for the writer's signature, and the typed name of the writer with his or her title. The whole signature is typed in block form beginning under the first letter of the complimentary close. In some blocked-paragraph letters, the complimentary close begins at the left margin; then the signature also begins at the left margin.

Very truly yours,

GRAM'S QUILT COMPANY

Evelyn Wauson, President

Never put a line for the writer's signature. This is a superfluous and old-fashioned practice.

When the writer has referred within the letter to I, me, my, or mine, this means that he or she—not the company—is writing the letter. Therefore, the writer's name is typed with his or her title, omitting the company name entirely.

Very truly yours,

Evelyn Wauson, President

A woman may include a courtesy title in her typed signature, so as to allow the recipient of the letter to reply appropriately. Parentheses may be used:

(Miss) Louise A. Scott

Ms. Tina Anderson-Tat

Mrs. Pat Brueck

The courtesy title is blocked with the complimentary close, not extended to the left of it. For a married woman, the signature may consist of either the woman's first name and her surname or her husband's name preceded by Mrs. (no parentheses).

Sincerely yours,

Mrs. Ruth Wilson

A widow may sign as though her husband were living. A divorced woman no longer uses the given name or initial of her former husband. She may use whatever courtesy title she wishes, whether or not she keeps her married surname.

Other Elements

Reference Initials It's no longer considered necessary to type reference initials—the initials of the letter writer and the typist. However, if the company requires identification of this kind for its files, show these on the file copy only and not on the original. The writer's initials are typed in capitals, the typist's in lowercase. To separate the two, use a colon or a slash. Many companies require only the typist's initials since the writer's initials are obvious from the signature of the letter.

When using a word processor, write the initials or name of the person dictating the letter on the office file copy.

Enclosures Mention of enclosures should be placed two lines below the reference initials. It may seem to serve no purpose to add "Enc. 2" if the body of the letter mentions the enclosure of two papers. However, the mailing department may find this notation helpful to sort outgoing mail. In addition, as the recipient of such mail, this helps you keep the contents of letters together as you prepare to distribute them **with-out** having to read every line.

Postscript Sometimes the letter writer will take advantage of the postscript—following the initials, and put "P.S.," two spaces below the signature or reference initials, to dramatize some bit of information. This is acceptable. However, you should never use the postscript to add something that was forgotten during the writing of the letter. Instead, rewrite the letter.

A Last Look

Before you consider the letter finished, decide if it looks like a picture on the page; that is, have you centered the whole thing? Ask yourself: If you received this letter, would you be favorably impressed? Then check your grammar, spelling, and punctuation again.

A business letter should be folded neatly and precisely. The side edges must match, the typing inside the folds must seem to be protected, and only the fewest folds for the perfect fit into the envelope must be used. Upon taking the letter from the envelope, the recipient should be able to begin reading the letter immediately and should find it attractive. Remember that this is the reader's first impression of your organization.

Letters Written by the Administrative Assistant

Letters written over your own signature usually include acknowledgments of correspondence received while your boss is away, letters requesting appointments, follow-up letters, and letters requesting information that another secretary can furnish. While these letters are an excellent opportunity to show your capability and initiative, always keep in mind that service to your boss and the company is the main factor in deciding which letters to write without dictation.

Many of the routine letters described in this chapter may be handled electronically through email. However, because business letters are more formal, personal, and usually generate results better than email, many executives prefer them over email for certain types of correspondence. Regardless of whether the document is printed on paper or transmitted as an email or fax, you should follow the same guidelines.

Planning the Letter

Good ideas can be clouded by verbosity, while clear and forceful words make for quick understanding. Therefore, plan your letters before you write a word. You'll save yourself precious time and effort and add to the company's bottom line because the time element is the greatest cost connected with writing a letter.

To begin, ask yourself: Is this letter supposed to serve the writer, the reader, or both? Will the letter give information, or will it request information? Will it ask for action? What data must it contain? Before you write, be sure that you have all necessary information on the subject, so you can readily refer to previous correspondence or double-check your information. If you're hazy about the subject of the letter, so will be the reader.

In the first sentence, mention your purpose in writing so that the reader immediately knows what the letter is about. Then follow with whatever explanation is necessary, using a positive tone at all times—that is, words chosen to evoke a positive response. Speak directly to the reader from his or her own point of view, not from yours. The reader must see the advantages of replying favorably.

Use concise language, but be as natural as possible, as though you were speaking to the other person. Reserve the last sentence to request a response if there is to be further correspondence on the subject. Always make that last sentence complete, never hanging. A hanging statement is one that leads into the signature, such as “Hoping this meets with your approval, I am. . . .” If that’s the thought you wish to express, state it instead as, “I hope this meets with your approval.”

In a business letter, there’s no place for cute or clever remarks or for slang. Your use of slang may be misinterpreted as your not knowing the correct English equivalent. Also avoid exaggeration, sarcasm, or any remarks derogatory to any person or to any product—even competitors.

Letters Written for the Employer’s Signature

Your boss may prefer that all letters be written over his or her name rather than having some letters written over yours. This may be true even if you compose the letters and have permission to sign the boss’s name yourself.

When you’re composing such a letter, use the boss’s characteristic language and style. If your employer usually dictates in a short, concise manner, word the letter in the same way. If your boss usually goes into detail, do the same. And when you sign your employer’s name, try to duplicate his or her handwriting as nearly as possible. In other words, make the reader think that your employer took the time to dictate the **let-ter** and sign it. To do less is an insult to the recipient.

Never write “Dictated but not read” or “Signed in Mr. Wilson’s absence.” It’s insulting to the recipient, implying that your employer either didn’t have the time or didn’t take the time to read and sign the letter personally. It also hints that you could not be trusted to write what your employer asked you to write.

For the same reasons, don’t sign the boss’s name and then add your initials beside it. If you find it useful to show the true writer and true signer, make a notation on only the file copy for future reference.

When you write a letter on your employer’s behalf but in your own name, sign it, but do not type your name below the signature line. Instead, type:

Sincerely yours,

Secretary to Mr. Wilson

Routine Letters

Encourage your boss to trust you with routine correspondence by emphasizing the enormous time savings it will produce. Then, when the boss discovers you can **pre-prepare** such letters for signature without dictation, he or she may reward you with more challenging correspondence. Following are the types of routine letters you should be able to handle with ease.

Appointments and Acknowledgments

You may write letters that request an appointment for your boss or acknowledge letters requesting an appointment with him or her. In each letter, always refer to the reason for the appointment and the suggested time. Always request a confirmation.

If a certain time has been requested and your employer approves, confirm the appointment accordingly. If your boss will be occupied at the requested time, suggest another and ask for confirmation. Be sure to keep a record of appointments suggested and not yet confirmed. If there is ever a disagreement over whether your employer broke an appointment, you will have proof otherwise in writing. For this reason, if the back-and-forth process of setting an appointment moves from the letter to the telephone, always send a letter to confirm it in writing.

Reservations

In writing for hotel reservations, state the type of accommodation desired, the name of the person desiring it, and the date and time of arrival, with the probable date of departure. Then request confirmation.

Usual reservations for plane or train travel may be made through a travel agent who understands your employer's requirements and makes every effort to satisfy. Travel agents can be invaluable to a business, and their services are free because their fees are paid by the airline or hotel. When using a travel agency, a telephone call will substitute for a letter to request arrangements; however, do request written confirmation once arrangements have been made.

Follow Up

In some offices, secretaries use a follow-up file (or a tickler file) to check on delayed replies after a certain lapse of time. When you write a follow-up letter, refer to the previous correspondence, identifying the last letter by date as well as content, and **per-haps** enclosing a copy if it contains a great deal of detail that could be useful should the original not be available to the addressee.

If you have many follow-up letters to write, instead of composing separate reminders, prepare a form request that can be duplicated on the copier machine or in your word processor. When follow-ups are sent outside the company, often the enclosure of a stamped return envelope will speed a reply.

Sample Model Letters

When a letter is typical of ones you send out frequently, make an extra copy and place it in a special binder, or keep a copy in the memory of your computer so you can refer to it as a model when you have to write that sort of letter again. On a typed letter, note the space plan for margins and center measurements so you'll have the format already arranged. With a computer or word processor, these margins and center measurements are much easier to reset.

Personal Letters

You'll find that many of the letters in this "letter bank" will be from your boss to another businessperson, yet the subject will be personal in nature. These letters are among the most difficult to write, since they must display sincerity in a variety of situations: sending congratulations, declining invitations, offering condolences, and the like.

Figures 2-2 through **2-4** are samples of personal letters to business associates that you may adapt for your own use. Such letters should use the salutation that your boss would normally use for the recipient. For the signature, use the name the employer is called by that recipient.

FIGURE 2-2 Sample Letters of Congratulations and Acknowledgments

Dear John:

I have just read in The Wall Street Journal of your promotion to General Sales Manager. I don't think that Smith and Company could have chosen a better person for the job.

Sincerely yours,
[signed] Phil

Dear John:

I appreciate your generous letter about my promotion to Executive Vice President. Such good wishes and kind words will help me do a better job, I'm sure.

Thanks for your note and for your valued friendship.

Sincerely yours,
[signed] Phil

FIGURE 2-3 Sample Letters of Condolences

Dear Mrs. Wilson:

It is with great regret that I just read of your son's passing.

I know no words of mine can console you in this sorrowful time, but I do want you to know of my deepest sympathy. You have many friends who are thinking of you.

Sincerely yours,

Philip Brown, President

Dear Mr. Crenshaw:

All of us at Thorne and Sons were saddened to learn of your wife's death. We know there is nothing we can say to help you in this time of grief, but we do want you to know that we extend to you our very deep sympathy.

Sincerely yours,

Philip Brown, President

(continued)

Dear Mrs. Holmes:

We at Liberty Oil Company were sorry to read of the tornado that struck your Denison factory. We know the loss was very great, but we know also that you will rise and go ahead with rebuilding.

If we can be of service in helping you overcome your present problems, please call on us. We have enjoyed doing business with R. G. Holmes Corporation and look forward to resuming our enjoyable relationship in the near future.

Sincerely yours,

Philip Brown, President

FIGURE 2-4 Sample Letter of Thanks

Dear Henry:

Your card and beautiful bouquet of roses helped a great deal to make last week bearable I am back at the office and feel I shall be good as ever very soon.

The accident was a shock, but with good friends like you, I know the days ahead will be brighter. You may be sure that I appreciate your friendship all the more at a time like this.

Sincerely yours,

[signature only]

Personal Service and Hospitality

When a person has done your employer a personal service or has entertained the boss without financial remuneration when he or she is out of town, that person should be thanked in a letter that can be written by you (**Figure 2-5**).

Introductions

Letters of introduction written by you for the boss's signature may be mailed or **pre-pared** for delivery in person. Such letters should contain the name of the introduced person, the reason for the introduction, the personal or business qualifications of the person, and a courtesy statement

(**Figures 2-6 and 2-7**).

FIGURE 2-5 Sample Letter of Personal Service and Hospitality

Dear Janet:

If it hadn't been for your keen mind and able assistance, our recent sales meeting might have been a complete flop. Because I had never before conducted such a meeting, I certainly was lucky to have your help. Thank you for your good judgment and wise suggestions

Sincerely yours,

[signature only]

FIGURE 2-6 Sample Letter of Introduction to a Business Associate

Dear Mr. Fielding:

This will introduce a good friend of mine, John August, who is associated with our state's Department of Commerce. He has heard of the fine work you are doing in Ohio and hopes he will have a chance to talk with you for a few minutes when he visits Cincinnati next Tuesday, March 22.

I have asked Mr. August to telephone you upon his arrival in Cincinnati to learn whether you can see him on that day. If you can, I shall appreciate it. I think you will enjoy meeting him.

It was great to see you at the Boston convention, and I look forward to the Buffalo convention in September.

Sincerely yours,

Philip Brown, President

FIGURE 2-7 Sample Letter of Introduction to a Personal Friend

Dear Tom:

A very good friend of mine, John August, will be passing through Nashville on his way to Boston next Tuesday, and I have asked him to stop by your office. John is a fellow you will enjoy meeting.

I shall appreciate any courtesy you may extend to him while he is in Nashville—his first visit to your great city, by the way.

Sincerely yours,

[signature only]

Invitations

Letters of invitation should be gracious without undue formality. Always tell when, where, and why the event will take place. (See **Figures 2-8** and **2-9**.)

FIGURE 2-8 Sample Invitations to Attend a Luncheon or Dinner

Dear Mr. Brueck:

The American Consolidated Life Insurance Company is holding a dinner next Thursday evening honoring its million-dollar-a-year salespeople. Will you join us as our honored guest?

Since you would be seated at the head table, we are asking you to join us in Room 200 of the Waldorf Hotel at seven-thirty, so that we may arrive at the banquet room in a group.

Sincerely yours,
Nora Drake, President

Dear Roger:

Arthur Whitfield is coming to town next Friday, and Mary Smith and I are entertaining him at a luncheon at the Ritz. We hope you can set aside a couple of hours so as to join us. I am sure Arthur will be happy to see you, as Mary and I shall also.

The luncheon will be held in the Persian Room at twelve-fifteen.

Sincerely yours,
[signature only]

FIGURE 2-9 Sample invitation to give an address.

Dear Mr. Lee:

As President of the Chicago Rotary Club, I have been asked to arrange the program for our next Thursday noon meeting. I know that all of our Chicago Rotarians would like to hear the address you gave in Detroit last week (I was

privileged to be in attendance there) on the subject of "The International Situation."

Next Thursday's meeting will be held in the Venetian Room of the Drake Hotel. I hope you will be with us to give our members the same treat you afforded the Detroit Rotarians.

Sincerely yours,

Philip Brown, President

Acceptance of Invitations

Letters of acceptance should be brief, appreciative, and enthusiastic. If the letter of invitation failed to include complete details, the letter of acceptance should ask for specific information

(Figure 2-10).

FIGURE 2-10 Sample Acceptances of an Invitation

Dear Miss Brett:

It is a pleasure to accept your invitation to attend the dinner next Thursday evening honoring your million-dollar-a-year salespeople.

I shall be in Room 200 of the Waldorf Hotel promptly at seven-thirty, as you request.

Thank you very much for your invitation.

Sincerely yours,

Philip Brown

Dear Mr. Brown:

I shall be delighted to speak to the Chicago Rotary Club next Thursday.

Thank you for inviting me.

Your suggestion that I repeat my Detroit address means that I won't have to prepare a new one.

I shall look forward to seeing you in the Venetian Room at noon.

Sincerely yours,

Barry Lee

Declinations

Letters declining an invitation should express appreciation and enthusiasm, with an assurance of regret or an explanation (**Figures 2-11** and **2-12**).

FIGURE E 2-11 Sample Letters of Declination

Dear Miss Brett:

Only yesterday, I accepted an invitation to speak in Boston on July 12, the date of your dinner meeting honoring your million-dollar-a-year salespeople.

This will make it impossible for me to be your guest that evening.

It was kind of you to invite me, and I regret my inability to attend. I hope the occasion will be a very successful one.

Sincerely yours,
Steve Wauson

FIGURE 2-11 (continued)

My Dear Mrs. Scott:

In reply to your letter of May 3 inviting me to participate in your association's fund-raising campaign, I appreciate your thoughtfulness in writing to me.

I am familiar with your association's good work, and in the past it has been

my pleasure to contribute to it. It is with regret, therefore, that I must tell you

that all my available funds for purposes of this nature have been pledged. It is not possible for me to be a party to your worthy program at this time

You have my best wishes for a highly successful campaign.

Sincerely yours,

Mrs. Susan Wilson

FIGURE 2-12 Sample Letter of Declination

Dear Mr. Bryson:

I dislike writing a letter that will cause someone inconvenience, but this one falls within that category, to my regret.

This morning, I was advised that a close relative had passed away in Denver, and I shall be leaving this afternoon to attend the service tomorrow, the day of your meeting.

I am sorry that I shall not be able to speak to your group and especially that you will have to find a speaker to replace me at this late date. I hope you understand that I am helpless to avoid this trip.

I hope your meeting will be successful in every way.

Sincerely yours,

Nora Drake, President

Because this cancellation comes so close to the date of the speech, this letter would immediately be delivered by messenger or would be faxed or emailed if the addressee is in another city. It is wise to follow up with a phone call.

Interoffice Memorandums and Emails

If the company you work for is large, much of your correspondence will be with other departments or perhaps with branch offices scattered throughout the company. The office memorandum, commonly called a memo, is a popular and inexpensive method of communicating with these fellow employees.

In many offices, paper memos have been replaced by emails. However, there are many types of communication that are inappropriate for email. For example, confidential information or information that should not be forwarded should be printed on paper and not sent as email.

Memos should be directed only to persons within the organization and should be signed or initialed by the sender. If a memorandum is confidential in nature, enclose it in a sealed envelope. If copies are sent to individuals other than the person or **per-sons** addressed, a notation to that effect should be made at the lower left corner of the form. If you wish to create memo forms from scratch, use plain white paper. If your office is equipped with word processing computer software, store the basic form in the computer's memory and retrieve it when needed. Figure 8-13 contains an example.

FIGURE 2-13 Sample Interoffice Memorandum

TO: Mary Anne Scott, Shipping Department Manager

FROM: Bob Brueck, President

DATE: May 12, 2012

SUBJECT: Meeting to discuss various overseas carriers

A meeting has been scheduled for Tuesday, May 12, in my office to discuss with several carrier representatives suggested methods and costs to deliver our **prod-ucts** to international markets. Your attendance is requested.

Distribution:

Tom Alberton

Martha Reeves

Paper Selection

Paper selection is important for some written communications. Paper and envelopes come in various sizes, colors, and qualities. One way to rate a particular paper is by its basis weight. For example, 20 lb paper is often used in copy machines and laser printers, while 100 lb paper can be used for report covers.

Paper with rag content and cotton is more expensive than other varieties and is often a choice for letterhead. The standard size for letterhead is 8 1/2 x 11 inches.

Envelopes

Envelopes come in a variety of sizes. Security envelopes have extra thickness so that documents cannot be read through the envelope by holding it up to a light source. Windowed envelopes have a clear plastic window that allows an address to show through. Typical envelope sizes include:

- No 6 3/4—3 5/8 inches x 6 1/2 inches

- No 9—37/8 inches x 87/8 inches
- No 10—41/2 inches x 91/2 inches

Email

Email is short for electronic mail. It involves the exchange of written messages sent over computer networks such as the Internet. In many offices, email has replaced **writ-ten** memos, drop-by office visits, and even phone calls. Email provides a written record of office communications. You can send messages to groups of people simultaneously, attach files, and include hyperlinks to websites. Email is one of the most popular and effective tools for communicating with others over the Internet. With email, you can send a message to anyone in the world who has email access—and, barring technical difficulties, the message will be received in a matter of minutes.

Email Accounts

An email account allows you to connect to a network and the Internet. This is done through an Internet Service Provider, or ISP. The ISP helps you get connected to the network using a dial-up telephone connection, DSL, cable modem, WIFI, or cellular connection. When you establish an account with an ISP, the ISP will provide you with the following:

Email address

In most cases, this will be your name or nickname, followed by the @sign and an ISP identifier that will most commonly end with the extension .com or .net.

POP server

This is the name of your incoming mail server. POP stands for Post Office Protocol. This is the ISP's computer that receives incoming email messages addressed to you.

SMTP server

This is the name of the outgoing mail server. SMTP stands for Simple Mail Transfer Protocol. This is the ISP's computer that processes the email messages you send.

User name

This is usually the part of your name that appears in your email address before the @ sign. Some ISPs use your entire email address. The user name is used to access the ISP's system along with your password.

Password

This is the secret code you'll use to keep your email private. In many offices, an administrative assistant will obtain an email account from the company's system administrator. This person will assist you in setting up your computer to send and receive email and will provide you with your user ID, password, and email address.

Passwords can sometimes be case-sensitive. If your email password is all uppercase letters, you will need to press the SHIFT key while entering your password.

You should never store your password around your computer. Your password should be something that is easy to remember. If you are assigned a password that is hard to remember, change it yourself. Most email systems encourage you to change your **pass-word** often. The best passwords combine letters and numbers and are at least six characters in length. Never use your name, your user name, your telephone number, your birth date, your Social Security number, or family names as passwords. Also, never use any real word that can be found in the dictionary without combining it with numbers.

Email Programs

Email can be accessed from a website. This is often called Web mail. You can also use email software provided by your ISP. However, in most businesses, the most **common-ly** used email programs include:

- Microsoft Outlook Express
- Microsoft Outlook
- Windows Mail
- IBM LotusLive Suite
- Macintosh Mail
- Google Mail (Gmail)

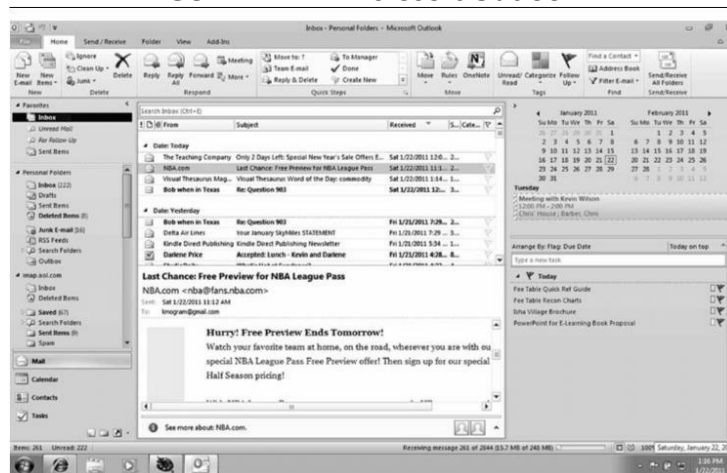
All email programs have similar features such as file folders for organizing mail, toolbars, a menu bar, a message list, and a message view window. The most **common-ly** used toolbar or menu bar commands include:

- New Message—to create a new message
- Print—to print a paper copy of a message
- Read—to view a message in a separate window
- Reply—to reply to a particular message
- Reply to All—to reply to everyone copied on a previous message
- Send and Receive—to send out mail you've written and receive new messages
- Forward—to send an email you've received to someone else
- Attachment—to send a computer file along with your email message

Microsoft Outlook

Microsoft Outlook is a more advanced email management program that is included with the Microsoft Office suite of programs. Microsoft Outlook is one of the most common email programs used by businesses today. In addition to sending and receiving email, users can also manage their personal calendar, schedule meetings with coworkers, and manage contacts. Microsoft Outlook can also be integrated with voice-mail systems so that voice messages can be retrieved and played on your computer. Figure 2-14 shows a screen image of Microsoft Outlook.

FIGURE 2-14 Microsoft Outlook



Windows Live Mail

Windows Live Mail functions similarly to Outlook. Windows Live Mail includes a built-in search box that lets you search for specific content in all your email messages. There is also a junk mail filter that helps reduce the amount of spam. Figure 8-15 shows a screen image of Windows Live Mail.

IBM LotusLive Suite

IBM's LotusLive Suite is an email messaging and collaboration program that includes email, a schedule, a To-Do list, a calendar, an address book, a personal journal, Web pages, and databases. LotusLive Suite can be integrated with voice mail, pagers, fax, and wireless devices such as cellular telephones and smart phones. **Figure 2-16** shows a screen image of LotusLive Suite.

FIGURE 2-15 Windows Live Mail

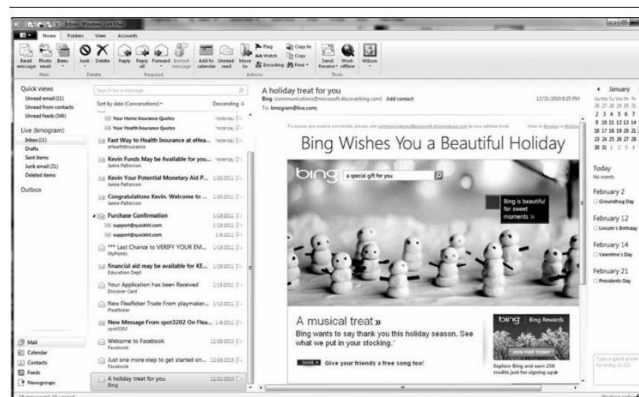
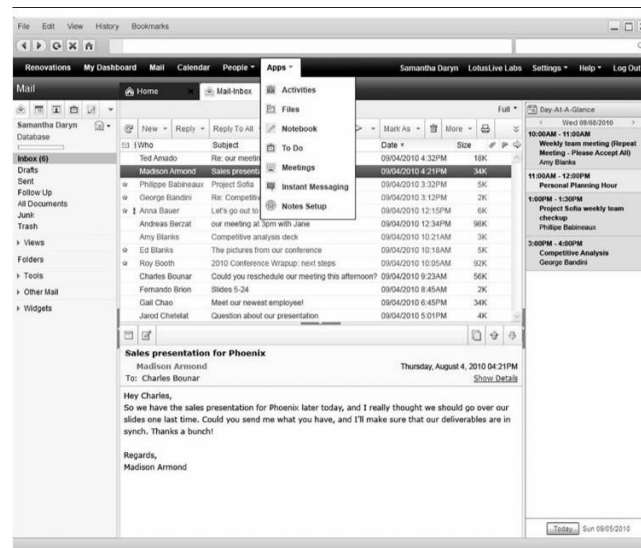


FIGURE 2-16 IBM LotusLive Suite.



Apple Macintosh Mail

Apple Macintosh Mail is a program that comes with the Apple OS X operating **system** used on Macintosh computers. Mail is a multifaceted program that allows for customizing mail messages with personalized stationary. It can be used as a memo pad and for keeping a To-Do list. Incoming email messages can be easily added to a To-Do list in order for you to stay organized.

Mail is a full-featured email application that includes most of the same functionality as Microsoft Outlook and LotusLive Suite.

Managing Email

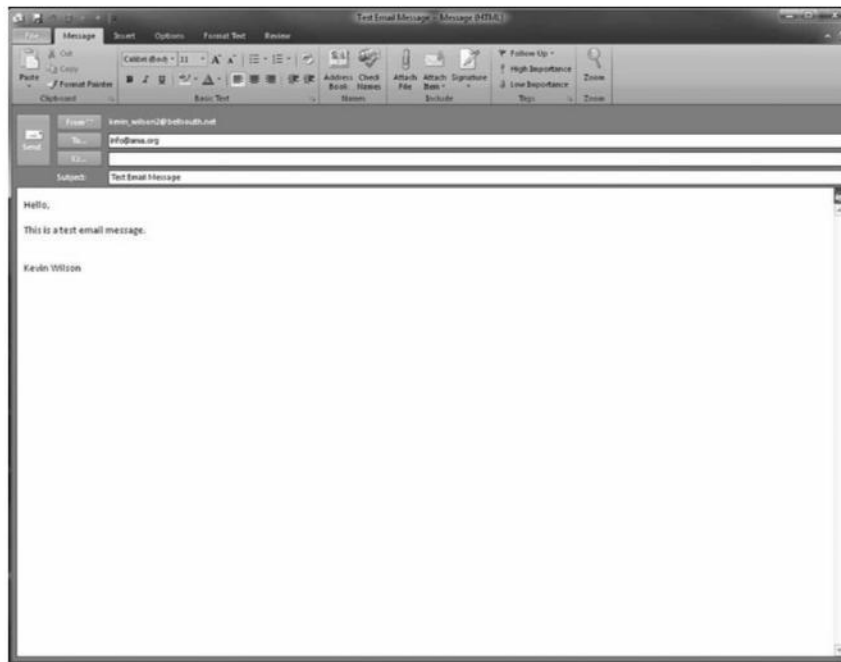
When you receive mail, the email program stores it in your Inbox. When you click the Inbox, you will see a list of messages you have received. When you select a message from the list, the body of the message is displayed in a window. You may read other messages by clicking on the listings in the Inbox window.

The icon to the left of a message indicates whether or not the message has been read. In Microsoft Outlook and Windows Mail, unread mail has a sealed envelope to the left of the message. When you read a message, its icon automatically changes to an open envelope.

After you have read a message, it remains in your Inbox. You can reduce the clutter in your Inbox by moving the messages to other folders. You can also use menu items to move a message to the Deleted Items folder or, once the message is highlighted, you can simply press the DELETE key.

You can print a message by opening it and clicking the PRINT icon on the **tool-bar**. To compose a new message, you click the NEW MAIL icon on the toolbar. A New Message window then appears.

Figure 2-17 shows the New Mail window in Microsoft Outlook.



To send a message, click the SEND button on the toolbar. The message will be stored in the Outbox folder until you click SEND AND RECEIVE. In Lotus Notes, you have to click REPLICATE to send and receive mail.

Sending Attachments

Whenever you email a message to someone, you have the ability to send additional files along with your message as an attachment. In Microsoft Outlook, you click the ATTACH icon on the toolbar. The Insert Attachment dialog box will appear. You can navigate to the appropriate file and attach it to the email message. You'll then see the attachment listed or shown as an icon, along with your message.

When you receive an attachment, the email program lets you know by showing you a small icon next to the message in your Inbox. In some email programs an attachment shows up as a paper clip icon. When you open the message, you will see a listing for the attachment or an icon embedded within the document. Double-clicking the icon will open the attachment file

Reasons for Sending Attachments

There are a number of reasons one chooses to send someone an attachment. Here is a partial list of reasons:

- The recipient can use the attached file to add, edit, or make revisions.
- You need a document to arrive ready to print and distribute.
- The recipient needs the document immediately.
- You need to send a single document to many different recipients.
- The recipient is going to distribute the document to others.

Alternatives to Sending Attachments

You should avoid sending attachments when they are unnecessary. You can avoid sending attachments by:

- Cutting and pasting word-processing data into your email message.
- Placing the files on a website or File Transfer Protocol (FTP) site for downloading.
- Sending the files on a CD or DVD.
- Faxing the document.
- Printing the document and sending it via regular mail or overnight express.

Problems with Attachments

Email attachments can be big and take a long time to download if the recipient has a slow connection. There can also be translation problems when the recipient doesn't have the right program or the correct program version for opening and using the attachment. In addition, many viruses spread across the Internet through infected attachments.

Email Protocol for Sending Attachments

Unless you send attachments to someone on a regular basis, you should always check with the recipient before sending an attachment. Make sure the person has the right software and can handle downloading the file.

When you send an attachment, use the email message as a cover letter. Explain what the attachment is and why you are sending it. You can use compression software if you are sure the recipient also has the same software. Compression software reduces the file size and download times for users with slower dial-up Internet connections.

Always keep in mind that the formatting of a document may change on the recipient's computer. Many files, such as Microsoft Word documents, are printer-dependent. That means that their layout on the screen and on paper is dependent on what model printer is installed.

If you want to make sure a document will look the same on the screen and when printed on a recipient's computer, use Adobe Acrobat. Adobe Acrobat uses a file format called Portable Document Format (PDF). Adobe Reader, which lets you open and read PDF files, can be downloaded for no

charge from the Adobe website at www.adobe.com. To create an Acrobat document, you need to purchase Adobe Acrobat creation software. After the software is installed on your computer, you will be able to create Acrobat documents by printing your document to the PDF printer, which acts as a software-only printer connected to your system. Instead of printing your document on paper, your document is printed as a PDF file and stored on your hard drive.

Attachment Protocol for Recipients

Don't get upset when you can't open an attachment. When this happens, send a reply and explain the problem. If necessary, ask for word-processing documents to be saved as text or have the document printed and mailed.

You should know what kind of attachments you can open. Each program has a file extension—a dot and three characters—added to the file name. The file extension is used by a program to identify its own data files. When you examine an attached file extension, it will tell you what program is needed.

The following is a list of common file extensions and the program needed to open them:

- doc and docx—Microsoft Word
- txt—Microsoft Word, WordPad, or Notepad
- rtf—Microsoft Word
- pdf —Adobe Acrobat Reader
- xls and xlsx—Microsoft Excel
- ppt and pptx—Microsoft PowerPoint
- pps—Microsoft PowerPoint
- jpg—Windows Paint
- bmp—Windows Paint
- gif—Windows Paint
- mp3—Windows Media Player
- mov—Quicktime Player
- avi—Windows Media Player
- zip—WinZip or other compressed file

Be careful with executable file attachments. These files are actually programs that could install a virus. Executable file extensions like exe, vbs, com, drv, dll, bin, and sys can easily contain viruses. You should always use anti-virus software and keep it up-to-date. Don't open file attachments from people you don't know. Some viruses come embedded within legitimate files, such as Microsoft Word macro viruses. Because of this, you should always download file attachments to your hard drive and scan them with your anti-virus software before opening them

Hyperlinks in Email Messages

There is a limit on how large of an attachment you can send with an email message. The maximum size varies depending on the recipient's Internet service provider. One alternative to sending a file attachment is to post the file somewhere on the Internet and to send a link to the file within an email message. In most email programs, when a Web address appears in the body of a message, it shows up as a hyperlink that the recipient can click to view or download.

Organizing Your Email

When you receive messages in your email program, they automatically go to the Inbox. In time, the number of messages you receive may crowd the Inbox and make it difficult to keep track of information. You can create new folders to organize your messages. You can then drag and drop messages from the Inbox to the various folders to store and save them.

It is important for an administrative assistant to keep a good filing system for email messages. You may want to create separate file folders for projects, personnel, clients, or subjects. You can create folders within folders to further organize your messages.

Email Address Book

All email programs have an address book to help you manage your email contacts. There are two ways to generate listings for the address book: You can enter the information manually, or you can add to a list through a menu command. Once you've added names to your address book, you'll want to start using it to address messages.

Signature Files

A signature file is a small text file that can be added automatically at the end of your email messages. Signature files are created in ASCII text format, which is a format that can be read by any program on any computer.

The content of this file should include your name, title, company name, address, phone, company website, and your email address.

Returned Mail

Sometimes a message you send cannot be delivered. When this happens, you will receive a message notifying you that your mail has been returned. There are a number of reasons this could happen. Often, the cause may be temporary problems with your ISP, or the host server of the intended recipient may not have been online when your message arrived. In addition, you may have made an error in the intended recipient's address. Should a message be returned to you, read the routing

information that appears at the top of the message. Verify that you sent the message to the proper address. If the problem persists, notify your ISP or the person you're trying to send mail to.

FIGURE 2-18 Windows Live Messenger.



Instant Messaging

Instant messaging is a form of rapid response email that allows a user to send **multi-ple** email messages back and forth to another person when both parties are online at the same time. Rather than sending a series of email messages that must be read and replied to individually, instant messaging allows the two users to chat with each by typing short messages to each other.

Instant messaging allows you to store a list of people whom you want to **con-tact** with instant messages. This list is often called your buddy list or contact list. You can send a message to anyone on the list who is online.

When you send an instant message to someone, a message window opens where you and the other person can type messages that both of you can see. **Figure 2-6** shows a screen capture of Windows Live Messenger. **FIGURE 2-18 Windows Live Messenger.**



There are a variety of instant messaging programs available, including:

- America Online Instant Messenger (AIM)
- Windows Live Messenger
- Yahoo Messenger

In addition to being able to type text messages back and forth, the most popular instant-messaging software allows for sending files, images, video, and sounds.

Email Protocol for Administrative Assistants

Since email is a written form of communication, you should follow proper email protocols in order to look professional. You can do this by using proper language and accepted rules.

Addressing Your Email

To send a message to someone, enter his or her email address in the To field. Always verify the correct email address of a recipient. Sending just one email to the wrong person could be a disaster. If a person is already in your address book, many programs fill in the address automatically when you click on the name.

The CC field is for “carbon” copies. You should add recipients to this field when you want them to have a copy of a message but do not need a response from them. You should use this field sparingly, unless you are certain the recipient knows why he or she is receiving a copy of the message. Using this field can be confusing, since many people consider CC messages as FYI (for your information).

The BCC field is for blind “carbon” copies. When you add a recipient to this field, any recipients in the To or CC field will not know the person in the BCC field was copied. In most cases, you should not use the BCC field to send secret messages behind someone’s back. This can be an email etiquette disaster. Instead, use the BCC field to send messages to a list of people in order to keep their email addresses private.

Subject Line

Most email recipients decide when and whether to read a message based on the **sub-ject** line. Always add a subject to the subject line. Some computer novices and ultra-busy executives forget to add a subject line. Even if you have to reply to a message you receive that does not have a subject line, always add one yourself.

Keep your subject short. Many email programs limit the subject line message to forty characters or fewer. Avoid starting your subject out with “RE.” Many programs automatically insert “RE:” in the subject line when you reply to a message. You may want to capitalize the subject like a book title; that is, capitalize the first letter of each word except for articles and infinitives.

Always be very specific with your subject lines. A subject like “ISS Meeting on Tuesday” is better than “Meeting.” Make the subject meaningful. If the message generates a back-and-forth conversation, you’ll know what the message is about after you received it for the third time.

Message Greetings

Email should always have a personal greeting and include customized information. With email, there’s no need for the inside address, date, and all the normal things that go into a business letter. However, standard business letter protocol still applies with email.

If this is the first time you have sent an email to a recipient, introduce yourself and explain why you are writing. Be respectful of people you don’t know.

Body of the Message

Be respectful of the recipient’s time. Keep your messages short. If one sentence will do the job, use one sentence. If you have to switch subjects, it’s best to send a separate email so it can be filed separately.

Use the active rather than passive voice in your message. In the active voice, the speaker (or subject of the sentence) is the “doer” of the action being described. In the passive voice, the speaker (or subject) is the recipient of the action. For example, an expression in active voice is: “The committee drafted documents.” Alternatively, this idea expressed in the passive voice would be: “Documents were drafted by the committee.” Active voice is more direct and more easily understood.

Keep your language gender-neutral. Avoid using sexist language such as, “The salesman should configure his email program.” Instead, you could say: “The sales **per-son** should configure the email program.”

If you make a request in an email message, don’t forget to add “please” to your request. If someone does something for you, a polite “thank you” is always nice.

Always spell-check your messages. Most email programs have a built-in spell-check feature. Always proofread your messages before you send them. Many people don’t bother to read their messages before they send them, and it shows. Most spelling and grammar errors can be eliminated if you read your messages before clicking SEND. You can use common abbreviations and acronyms in your business emails if you are certain the recipient understands them.

Avoid using all capital letters in the body of your message. In Internet tradition, this means yelling. However, if you need to emphasize a word—such as DANGER or WARNING—that’s okay.

HTML Format Versus Plain Text

You can choose whether to send your messages in HTML format or plain text. The HTML format allows you to format your message just like word processing; **howev-er**, the recipient must be using an email program that recognizes HTML format. Within an office where everyone is using the same email program, such as Microsoft Outlook, it's okay to send formatted messages using HTML format. With plain text messages, all formatting information is disregarded.

For external emails, you should assume that the recipient is using a plain text email system. Therefore, when you send external emails, you should not use:

- Italics
- Bold
- Underlining
- Multiple colored or sized fonts
- Bullets
- Any special symbols or fonts
- Tabs
- Spacing to indent paragraphs

Even for internal emails, you should refrain from formatting your email to look like a desktop publishing job. Your message format should be basic and easy to read. Use paragraphs, and double-space between them. Don't double-space after periods. Most people now use a publishing style that requires only one space after a period.

Emoticons

Emoticons are little sideways faces created using punctuation marks. For example, the emoticon :-) means smile. Emoticons are often used to signal to your reader that you are being sarcastic or making a statement with a tongue-in-cheek attitude. They can also be used to soften a message. Use emoticons sparingly. They should be avoided at work.

Sign- Offs

For business email, you should always end your message with a formal sign-off. Sincerely, regards, or best wishes, followed by your name, are the best salutations for formal messages. For informal communications, you can sign off with just your name. For external emails, always include your contact information: name, title, company name, address, email address, and phone and fax numbers. Alternatively, include your contact information in your signature file.

When to Respond to Emails

In deciding how often to read and respond to email, you must balance your workload between productive work and spending all day doing email. Of course, your manager or a customer should get a quicker response than someone else if you are busy.

With most emails personally addressed to you, you should respond by the end of the business day. Even if the email requires that you perform a task or do some research, you should let the sender know you got the message and when he or she can expect you to complete the task.

You can use templates for frequently asked questions, such as directions to your office. You can create a template message in your word processor and cut and paste it into your email message.

When you send email to external recipients, you should not expect a reply as quickly as you would with an internal email. Unless a message is urgent, you should wait a few days, even up to a week, before resending the message. Remember, if a message is urgent, you can always call on the phone.

Handling Email Overload

When you find your Inbox swamped with messages, answer the most recent messages first. This will help you avoid answering questions or dealing with issues that may have already been resolved. In addition, by answering the most recent messages first, you maximize your appearance of promptness.

Don't spend all day reading and replying to email. You should read and respond to all non-urgent messages at one time—perhaps after lunch or at the end of the business day. File or delete messages you have already read and responded to. This will reduce the clutter in your Inbox.

Filtering Messages

There are filters built in to email programs like Microsoft Outlook. Filters allow you to sort messages directly to specific file folders, bypassing your Inbox. Filters do take some time to set up, but they are well worth the time. Some ideas for filters include separating:

Mail from particular people

- Internal email from external email
- Messages that do not include your company's domain name
- Messages where your email address is in the CC or BCC field
- Messages from mailing lists or newsgroups
- Personal email from family and friends

Urgent Messages

You should mark a message as “urgent” or “high priority” only when it really is. Never cry wolf with your email by getting in the habit of marking all your messages “urgent.” In fact, when you have an urgent message to send, you should consider whether email is the best medium for the message. Perhaps a telephone call would be more effective.

Return Receipt

On an internal email system, you can choose whether to be notified via email when a recipient receives your message. When the message is read, you get a read receipt.

Return receipts are usually not supported for external emails sent over the Internet. In many cases, the receipt tells you only that the message made it to the recipient’s email server. There are delivery receipt options in Microsoft Outlook that give the recipient the option of acknowledging the delivery of the message.

Some email programs allow you to read a message in a preview window without actually opening the message. If the recipient never actually opens and reads your message, you won’t get a return receipt.

If you send a message with a return receipt and do not get a receipt, or if you request something and do not get a response, send out a reminder message. For internal messages, give the recipient until the end of the day to respond. For external messages, give the recipient several days to a week to respond.

Rules for Forwarding Messages

Forwarding a message can be both good and bad. It’s good because it allows you to easily share information with others. It’s bad because any message you forward may end up becoming public.

When is it okay to forward messages? Not as often as most people think. Unless a person gives you permission to forward a message, you should not forward it. There may be many reasons someone would not want his or her message forwarded. The message may be for you only, the tone might not be appropriate for others, or the sender may not want to share his or her email address.

If you don’t want a message you send to be forwarded to someone else, how should you let the recipient know? Make it clear that the message is just for him or her.

Before forwarding a message that contains a history of replies, check to make sure that everything in the message is appropriate before you forward. Remove any unnecessary or sensitive content.

Always keep in mind that email is not private. Anything you write might be **for-warded**. Not everyone follows the correct protocols. One of the best rules to follow for email communication is to not write anything in an email that you would not want someone else to read.

You should never forward jokes and chain letters to anyone at work. You never know when someone might find them offensive. However, if you receive a lot of forwarded messages, you can set up a filter that looks for messages with FW on the subject line.

Is it necessary to reply to forwarded messages? The answer is usually no, unless you find that there is something in the message that specifically applies to you or one of your responsibilities.

Mass Mailings

Any time you need to send a single message to a group of people, you can always just add all of the addresses to the To and CC fields. However, this means you are sharing everyone's email address with everyone on the list. To avoid this, you can either **cre-ate** a group or use the BCC field. When you use the BCC field, none of the email addresses are revealed. You do need to put at least one email address in the To field; however, that can always be your own email address. You should never use the BCC field to send a message behind someone's back. This is considered impolite.

Creating a Group

Many email programs like Microsoft Outlook will allow you to create a group of email addresses from your address book and save the list with a unique name. When you send a message to the group, everyone in the list receives the message. Some company email systems have pre-configured groups. Be careful when **send-ing** emails to these groups. Know who these individuals are before you include them in a mass mailing.

Reply to All

If you receive a mass mailing and click REPLY TO ALL, everyone on the list will get a copy of your reply. This can be dangerous if done by mistake. When replying to a message, always make sure you click REPLY rather than REPLY TO ALL unless you really do intend to send a reply to everyone on the list. Some email programs will allow you set a preference that will prompt you when you click REPLY TO ALL. This feature helps prevent clicking REPLY TO ALL by mistake.

General Email Guidelines for Business

Email is not always the best medium for a message. Sometimes it is best to use the telephone or speak with a coworker in person rather than sending an email message.

Email is appropriate in business communications for things like directions, requests, information to be saved, information to be copied, and company-wide announcements.

What Messages Are Inappropriate for Business Email?

The following are examples of situations where email is an inappropriate medium for communication:

- Thank you notes
- Long memos
- Yes or no answers
- Job praise
- Telling your boss you are sick
- Requests for raises, promotions, or resignations
- Jokes
- Flirting
- Gossip
- Anything illegal or unethical

The Tone of Your Email at Work

When you email your boss, do not use a casual tone, even if you are friends. Keep your emails businesslike. You never know when your boss may need to forward one of your messages to a superior.

Never write an email when you are angry. Take time to calm down before you fire off a message you'll later regret.

International Email

There are special rules that apply to international business emails. Start by addressing the recipient as Mr. or Ms. and his or her surname. Do not use the recipient's first name. Keep the tone of your email formal, and avoid humor that might be misunderstood. Convert all your measurements to metric, and be careful about calendar dates. The date 2/06/14 means June 6, 2014 in Europe, not February 6, 2014. To be clear, always write out the month, day, and year.

If your message concerns money, be specific about what currency you are talking about. If you ask the international recipient to call you, provide him or her with the appropriate telephone country code. Also watch out for time-zone confusion. If you say you'll call the recipient at 5 p.m., make sure you are clear about whose 5 p.m. you mean.

Auto Respond Messages

When you are out of the office for longer than one business day and will not be able to respond to your emails, you should use an out-of-office notice that auto responds to your emails. An auto-respond message can be set up in your email program. It will automatically send a message to anyone who sends you a message while you are away. Your auto-respond message can inform the senders that you are away and will respond to their emails at a specific time when you return.

Email Hoaxes

From time to time you may receive forwarded hoaxes. You should be suspicious of any message that says, "Forward this to all your friends." Many times, these chain letters are simply ways to harvest email addresses for junk emailers.

If you are suspicious that a message may be a hoax, you can check the following websites dedicated to exposing Web-related hoaxes:

- urbanlegends.about.com
- hoaxbusters.ciac.org

You can also do a search of the particular message content in Yahoo.com or Google.com.

Spam

Spam is another word for junk email. These are the unsolicited sales offers and scams that try to trick the unsuspecting email user. Many Internet Service Providers have filters that attempt to eliminate spam; however, many spam messages still slip through. You can reduce the amount of spam you receive by setting up filters that look for subject line phrases like free, hot, money, hi, hello, and info. You should also report any spam messages to your Internet Service Provider. You can also report spammers to the U.S. government's Federal Trade Commission by sending an email touce@ftc.gov or fill out a complaint form at www.ftc.gov.

Never reply to spam. This will cause you to receive even more, because now the junk emailer will know your email address is real. Also, never click on any Web links in a spam message or call any telephone numbers listed.

Email Viruses

There are many different types of computer viruses that spread via email. These **virus-es** can clog up your hard drive and slow down your computer, destroy files, compromise access to your computer, and automatically spread viruses to other computers.

One of the most common ways to get a computer virus is from an email attachment. The attached file is either infected or is itself a virus. You should always use anti-virus software and keep it updated. Anytime you receive a file attachment, **down-load** it and scan it with your anti-virus software.

Email Privacy

Email is not private. Not only may your messages be forwarded to others, but your company has the right to read anything you write or receive via email. Because your employer pays for the computer, Internet connection, and your time, your business email account belongs to the company. Even if you delete email, it is still available for a company to view. The same rules apply for Web surfing and telephone usage.

Other Written Communications

Reports

As an administrative assistant, you may be asked to create a variety of reports for your boss. Some of the reports will be routine and will be created from various sources already available. Other, more formal reports will require input from your boss in the form of dictation, supplied documents, and a series of reviews and revisions.

There are four general types of reports that will be created by administrative assistants. They are:

1. Memorandum report
2. Letter report
3. Short report
4. Formal report

Memorandum Report

The memorandum report is a routine and informal report that might be prepared on a weekly basis to, for example, report the status of projects to upper management. This report is objective and impersonal in tone. There may be some introductory comments; however, they are very brief. Headings and subheadings are used for quick reference and to highlight certain aspects of the report. Usually, the memorandum report is single spaced and printed on plain paper; however, in some businesses, this report may be sent as an email or email attachment.

Letter Report

The letter report is normally a one-page letter that is printed on company letterhead. Letterhead second sheets are used for continuation pages. The letter report is most often sent outside the company to consultants, clients, or the board of directors. The report should have headings and subheadings to organize the content.

Short Report

The short report differs from the memorandum and letter reports because it has a title page, a preliminary summary with conclusions and recommendations, authorization

information, a statement of the problem, findings, conclusions, and recommendations. The short report may contain tables and graphs and can be either single or double spaced. Headings and subheadings are used to organize the content and to emphasize certain aspects.

The title page has the name, title, and address of the person or company to whom the report is being submitted. In addition, the title page includes the preparer's name, title, and address. Long report titles are divided and centered.

Formal Report

The formal report is more complex and has a greater length compared to the short report. Included in the formal report are the following:

- Report cover
- List of tables
- Flyleaf
- List of figures
- Title fly
- Synopsis
- Title page
- Report body
- Letter of authorization
- Endnotes or footnotes
- Letter of transmittal
- Appendix
- Foreword or preface
- Glossary
- Acknowledgments
- Bibliography
- Table of contents
- Index

There are specific margin settings for a formal report. The top margin for the first page should be 2 inches, and the top margin for subsequent pages should be 1 inch. Bottom margins on all pages are 1 inch. The left and right margins on all pages are 1 inch. For bound reports, the left margin should be 1 1/2 inches to allow extra room for the binding.

Spacing for the body of the report can be single or double. Set-off quotations should be single spaced, as are footnotes.

Paragraph indentations should be 5 spaces. Long quotations should be indented 5 spaces in from body. Numbered and bullet lists should also be indented 5 spaces in from body. Footnotes should match paragraph margins.

Primary headings should be left justified, bold, with additional space above and below. A 20- to 24-point sans serif font such as Helvetica should be used. Secondary headings should be left justified, bold, with a 16- to 18-point sans serif font. Third-level headings should also be left justified, bold, with a 12-to 14-point sans serif font.

There should be no page number on the title page, although a page number should be assigned for numbering purposes. The front matter should use small roman numerals for numbering. The body of the report should use Arabic numerals starting with 1. Page numbers should be either centered or in

the right margin, 1/2 inch to 1 inch from the top, or 1/2 inch from the bottom. Headings and Subheadings You should use a numbering system for headings. You can use numbers or a combination of numbers and letters. **Figure 2-19** shows two alternative heading numbering systems.

FIGURE 2-19 Heading Numbering Systems

1) Main Heading	I.Main Heading
1.1 Subheading	a. Subheading
1.2 Subheading	b. Subheading
1.2.1 Third-level heading	1. Third-level heading
1.2.2 Third-level heading	2. Third-level leading

Headings and subheadings should be parallel in structure. The following are examples of nonparallel and parallel structure.

Nonparallel	Parallel
1. Reading the Manual	1. Reading the Manual
2. The Instructions	2. Following the Instructions
3. How to Install the Software	3. Installing the Software

Report Cover

The cover should have the title and author's name. The title should be in all capital letters. The cover may optionally be printed on card stock.

Flyleaf

The flyleaf is a blank page that is inserted after the cover. A flyleaf is also sometimes added to the end of the report just before the back cover.

Title Fly

The title fly is a single page with just the report title in all caps, centered on the upper third of the page.

Title Page

The title page should include the title of the report in all caps, followed by the subtitle if there is one. It should also contain the recipient's name, corporate title, department, company name, and address. The page should also include the preparer's name, corporate title, department, company name, and address. The date the report is submitted should be included on the title page as well.

Letter of Authorization

The letter of authorization should be printed on letterhead and should explain who authorized the report and any specific details regarding the authorization.

Letter of Transmittal

The letter of transmittal is a cover letter for the report. It explains the purpose of the report, its scope, limitations, research used, special comments, and acknowledgments. The letter of transmittal may take the place of a foreword or preface.

Foreword or Preface

The foreword or preface contains an author's statement about the purpose of the report. This is an optional section that is used to provide **back-ground** on the project or to thank individuals who supported the project.

Acknowledgments

The acknowledgments page should list individuals, companies, or institutions that assisted in creating the report.

Table of Contents

The table of contents should include headings, subheadings, and third-level headings with page numbers. You can use an outline style with a heading numbering system. If you are using a word processor, you can automatically generate a table of contents based on the heading styles.

List of Tables

If tables are used in the report, you should include a list of tables in the front matter. The list should include table numbers, page numbers, and the descriptions that are used as table titles in the body of the report.

List of Figures

If illustrations are used in the report, you should include a list of figures in the front matter. The list should include figure numbers, page numbers, and the captions that are used with the figures in the body of the report.

Synopsis

The synopsis is a brief summary that presents the main points to be covered later in the report.

Report Body

The body of the report should include an introduction to the report, an introduction to the major sections (headings, subheadings, and third-level headings), and a summary at the end of major sections. The body should include normal paragraph breaks, bullet lists, numbered lists, illustrations, and tables.

Endnotes and Footnotes

A footnote is a note of text written at the bottom of a page in a report in order to site a reference or to make additional comments on content in the main body of the text. A footnote is normally labeled with a superscript number.

Endnotes are similar to footnotes, but rather than being written at the bottom of a page, they are listed at the end of a section or at the end of the report.

Appendix

If there are supplementary reference materials or sources of research, you can include them at the end of the report in a separate section, the Appendix.

Glossary

The glossary should include technical terms with definitions along with any abbreviations. Abbreviations should be spelled out the first time they are used in the body of the report.

Bibliography

The bibliography should list all sources of information that were used to compile the report.

Index

An index is optional for many reports. If you are using a word processing **pro-gram** such as Microsoft Word, an index can be generated automatically similar to the way a table of contents is created. However, you will need to mark index entries throughout your document before you ask the program to create the index.

Indexes are an alphabetical listing. The first word of each entry has an initial capital letter. The rest of the words are lowercase. Subentries in the index are like sub-headings and are indented one or two spaces. Cross-references direct the reader to another location in the index. Punctuation is kept to a minimum.

Documenting Sources of Information

You should always acknowledge the work of other writers to allow the reader to judge the quality of the information based on the quality of the source, and to enable the reader to verify information. Some writers use parenthetical references within the text to document sources; others include footnotes or endnotes.

Footnotes and Endnotes

Footnotes are short notes set at the bottom of the page. Endnotes are placed at the end of the report. In one common method for documenting sources, both footnotes and endnotes are numbered, with a small number inserted at the end of the text being referred to. The corresponding footnote appears at the bottom of the page; the corresponding endnote appears at the end of the report.

Footnotes and endnotes should include the author's name (or authors' names), the title of the source, the place of publication and publisher, the date, and the page reference. For example:

James Stroman, Kevin Wilson, and Jennifer Wauson, *The Administrative Assistant's and Secretary's Handbook* (New York, AMACOM Books, 2011), page 201.

You can also document sources by inserting parenthetical references within the text. The parenthetical references generally include only author names and the page being cited, for example: (Stroman, Wilson, and Wauson, p. 201). Full publication information appears in a bibliography at the end of the report.

Bibliographies

Bibliographies list all works cited in the report footnotes/endnotes or parenthetical references. You may also include research that was not cited as a specific reference but was used to create the report. The bibliography listings are ordered alphabetically by author's last name. If there is no main author, then the book title is used. The author's surname comes first. Additional authors are listed first name, last name. For example:

Stroman, James, Kevin Wilson, and Jennifer Wauson. *The Administrative Assistant's and Secretary's Handbook*. New York, AMACOM Books, 2011.

Report Templates

If you are using a word processing program such as Microsoft Word, you can create a report by using one of the report templates that are available. By clicking FILE, NEW, and then clicking the Reports Tab,

You will see three default reports that you can choose from:

1. Contemporary Report
2. Elegant Report
3. Professional Report
4. Press Releases

When writing a press release, start with the main idea, followed by major details related to the idea, followed by minor details, and then finally supplemental information. The major elements to include are the five Ws: who, what, when, where, and why. Also, don't forget to explain how.

A press release should be factual, interesting, and informative. All the details should be carefully verified and proofread.

Press releases should be printed on normal size office paper and be double spaced. All margins should be 1 inch.

The top of the press release should include contact information, with name, address, phone number, and email. The words Press Release and For Immediate Release or For Release (and then the date) should also be included.

If a press release is longer than one page, MORE is typed at the bottom of the first page in all capital letters, centered or on the right side. Subsequent pages are numbered and should include a short title caption, left justified.

At the conclusion of the press release, type five number signs ##### or -end- or (END).

Tables

Tables are a good way to organize information into a compact, easy-to-read form. Word processing software programs, such as Microsoft Word, have features for creating and formatting tables.

The default table has horizontal and vertical grid lines. You can determine the number of rows and columns as you create the table. You can also add additional rows or columns as needed. The table grid will be the same width as regular paragraphs. (See Table 2-1.)

You can click within a table cell and move the column spacers in the ruler to make columns wider or smaller.

TAB LE 2-1 Sample Table with Data**Sales by Region**

North	South	East	West
\$123,000	\$135,221	\$132,010	\$90,321
\$133,210	\$111,301	\$112,101	\$99,781
\$141,210	\$98,989	\$156,287	\$101,341

Other table cells can be merged to create cross-headings that span several columns or several rows. To do this, select the cells, then click the Table Menu, then click MERGE CELLS.

Data in a default table will be left justified. You can select a row and then click on a different justification using the icons on the toolbar. Some types of data—such as money—are often presented right justified. Heading text, as well as other text, can be made bold, italics, or both. You can change the color of the text and add shading to rows or columns.

You can change the height above and below the text within the table by selecting the table, then clicking FORMAT, PARAGRAPH, and then adjusting the settings for Spacing Before and After.

Using the borders and shading feature in the Format Menu, you can select the entire table or parts of the table and change the size or style of the grid lines. You can also remove the grid lines completely if you want. (See **Table 2-3** as an example of changing the format of a table.)

TAB LE 2-3 Table with Formatting Features

Sales by Region			
North	South	East	West
\$123,000	\$135,221	\$132,010	\$90,321
\$133,210	\$111,301	\$112,101	\$99,781
\$141,210	\$98,989	\$156,287	\$101,341

You should capitalize the first word of each item in a table, plus any proper nouns or proper adjectives. Table text can include numbered lists and bullets, just like regular document text.

When placing tables within a report, the table should appear as soon as possible after it is mentioned in the text. Tables should always be introduced in the text. Avoid breaking a table at the end of a page and running it onto the next page. Start the table at the beginning of a new page if necessary.

Add two spaces after the last normal paragraph text before inserting the table.

Leave two spaces after the table before resuming with the next paragraph.

Editing and Proofreading









Editing a document requires checking for the following:

- Grammar
- Spelling
- Punctuation
- Accuracy
- Style

The traditional lines between copyediting and proofreading have blurred with the use of computers in business. Many administrative assistants must edit and proofread their own documents before they are distributed. In some large offices, a technical writer or documentation specialist may edit reports that will be distributed to wide audiences within the company or communications destined for outside the company.

Sometimes a boss edits and proofreads documents and then sends them back with corrections. Depending on who is performing these tasks, an administrative assistant may need to make corrections to documents that contain proofreading symbols and abbreviations. (See Tables 2-4 and 2-5.)

TAB LE 2-4 Common Proofreading Symbols

Symbol	Meaning
	insert a comma
	insert an apostrophe or single quotation mark
	insert something
	use double quotation marks
	use a period here
	delete
	transpose elements
	

close up this space

#	a space is needed here
¶	begin new paragraph
No¶	no paragraph

TAB LE 2-5 Common Proofreading Abbreviations

Abbreviation	Meaning
Ab	a faulty abbreviation
AgrS/V or	agreement problem:subject/verb <i>or</i>
P/A	pronoun/antecedent
Awk	awkward expression or construction
Cap	faulty capitalization
CS	comma splice
Dgl	dangling construction
DICT	faulty diction
- ed	problem with final -ed
Frag	Fragment
	problem in parallel form
P/A	problem with pronoun/antecedent agreement

Abbreviation	Meaning
Rep	unnecessary repetition
R-O	run-on sentence
Sp	spelling error
- s	problem with final -s
STET	let it stand
S/V	problem with subject/verb agreement
T	verb tense problem
Wdy	Wordy
WW	wrong word

Copyediting

Use the following checklist when copyediting a document or manuscript:

- Are the headings and subheadings consistently used?
- Is the spelling correct?
- Are all proper names accurate?
- Are all lists parallel in structure?
- Do all nouns and verbs agree?
- Are numbered lists correctly numbered?
- Are all dates correct?
- Are all alphabetical lists in alphabetical order?
- Is all punctuation correct and consistent?
- Is all capitalization correct and consistent?
- Are all bibliographical references accurate and consistent?

Proofreading

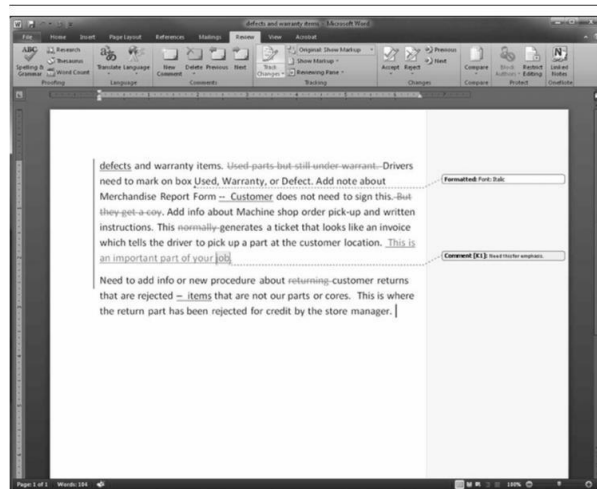
Use the following checklist when proofreading a document or manuscript:

- Are all headings and other text elements consistent in style and layout?
- For letters, are the dateline, reference line, initials, enclosure, and carbon-copy notation accurate?
- Are all cross-references accurate?
- Are all margins consistent and proper?
- Are all tables aligned correctly and consistently?
- Have any footnotes been omitted?
- Are all end-of-line word divisions accurate?
- Are there any accidentally repeated words in the document?
- Are the page numbers correct?
- Are all headings and captions separate?

Electronic Revisions

Rather than make edits on paper, you can make edits electronically on a word **process-ing** document. By using the Track Changes feature (**Figure 2-2**) in a program like Microsoft Word, you can allow multiple people to add revisions and comments. Revisions show up in different color fonts for each person's changes. After you have reviewed the revisions, you can accept them or reject them, either one at a time or all at once.

FIGURE 2-2 Revisions in a Microsoft Word Document



Further Reading: