



# UNIT-9

## Other Written Communication

### Learning Outcomes

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

## Unit 9

### 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 9-1** shows two alternative heading numbering systems.

**FIGURE 9-1 Heading Numbering Systems**

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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

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

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<b>Nonparallel</b>	<b>Parallel</b>
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

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**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 9-1.)

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

**TAB LE 9-2    Sample Table with Data**

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 9-3** as an example of changing the format of a table.)

**TAB LE 9-3 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 9-4 and 9-5.)

**TAB LE 9-4 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 paragraph

**TAB LE 9-5 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
Pron	problem with pronoun

Writers/Communicators

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:

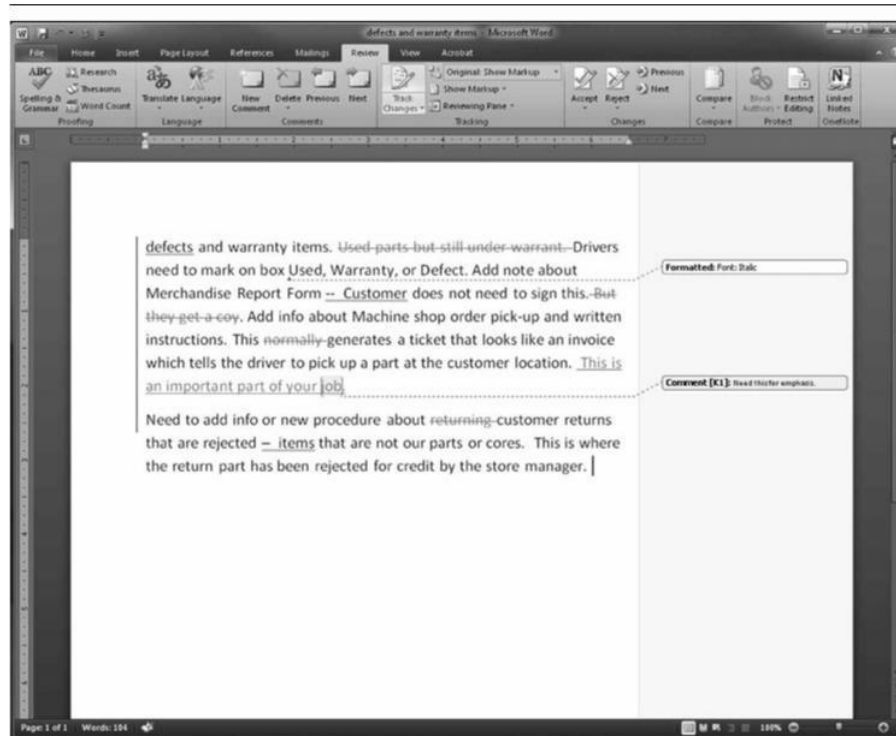
- Are all headings and other text elements consistent in style and layout?
- For letters, are the dateline, reference line, initials, enclosure, and carbon-copy notation accurate?
- Are all cross-references accurate?
- Are all margins consistent and proper?
- Are all tables aligned correctly and consistently?
- 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 9-2**) 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 9-2** Revisions in a Microsoft Word Document



**Further Reading:**