

Creating a Business Report

The main purpose of a business report is to present and analyze information. What information you present, and how, will depend on the purpose of the report.

Parts of a Business Report

Most business reports have three main parts: front matter, body, and back matter. The front matter includes pages such as the title page and the table of contents. The body contains the report's main information. Headings are often used to separate topics in the body if the report is long. The end matter contains pages such as the end notes page and the bibliography.

Format the Report

Here are some guidelines for formatting a simple business report:

- Use default side and bottom margins.
- Leave an approximate 2-inch top margin on select pages, including the first page of the report body and the Table of Contents, Endnote, and Bibliography pages.
- Use headers and footers to display page numbers, the name of the report, the date, and other information. The title page should not display any header or footer information.

Cite Sources in a Business Report

You can use either footnotes or endnotes to cite your sources in a business report. Models for both citations are shown on the right.

Footnote

¹ Hahn Jack, "Using Focus Groups," *Collected Business Essays*, New York, All Biz Publishing, 2009.

Endnote

1. Fine Cecilia, "Location is Everything," *Business Analysis Monthly*, August, 2010.

Footnotes and endnotes are formatted similarly.

SKILLBUILDER

- 1. Identify** What are the three main parts of a business report?
- 2. Summarize** What are three guidelines that you should remember when formatting a business report?
- 3. Plan** You work for a CD store, and you want to propose opening a branch of the store in a new neighborhood. Key an informal paragraph explaining what you would include in your business report.

Step-By-Step



- 1 Locate and open the data file **Business.docx**. Save as: **Business-[your first initial and last name]**.
- 2 Go to Page 2. Click before the head **Business Overview**.
- 3 Choose **Page Layout > Page Setup > Breaks**. Under **Section Breaks**, select **Next Page**.
- 4 **CHECK** Your page should look like Figure 4.21.
- 5 Click **Section Break**. When the cursor appears to the left of the break, press **DELETE**.
- 6 Repeat **Step 3** two more times.
- 7 Scroll up. Click before the second section break. Press **ENTER**.
- 8 **CHECK** Your screen should look like Figure 4.22. Save your file.

Shortcuts

If **Show/Hide ¶** is not active, press **CTRL** + **SHIFT** + * to view formatting.

EXERCISE 4-11 Insert and Delete Section Breaks

A blank Word document consists of one **section**, or part. A simple report usually has three main sections: the front matter, the report body, and the end matter. Inserting a **section break** divides a document into different sections. Each section in a document can be formatted differently. Dividing a report into sections makes it easier to apply specific margins and other formatting to the report's individual parts.

FIGURE 4.21 Section break inserted into a document

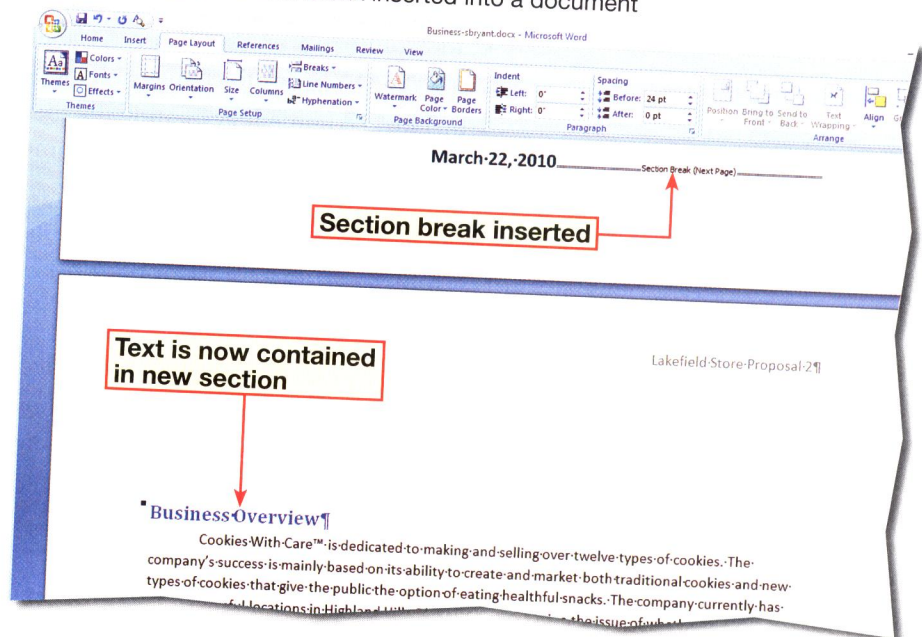
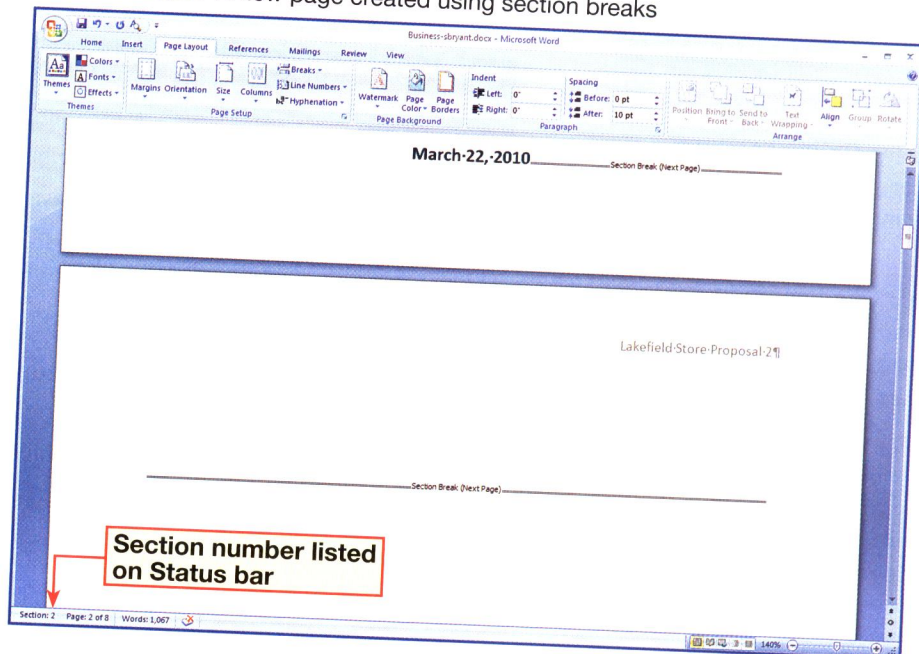




FIGURE 4.22 A new page created using section breaks




Step-By-Step

1 In your **Business** file, select the paragraph mark next to the second section break. Choose **Home>Font>Clear Formatting** .

2 Choose **References>Table of Contents>Automatic Table 1**.

3 **CHECK** Your screen should look like Figure 4.23. Select the text **Business Overview**. Choose **Home>Font>Dialog Box Launcher** . Check **All Caps**. Click **OK**.

4 With the text still selected, double-click **Format Painter** . Select **Current Location Analysis, Lakefield Overview, and Conclusion**.

5 Click **Format Painter** once. Deselect the table of contents.

6 **CHECK** Your screen should look like Figure 4.24. Save your file.

 *Continue to the next exercise.*

EXERCISE 4-12

Create and Format a Table of Contents



A **table of contents** lists the topics in a document along with their page numbers. You can create a table of contents automatically. By default, the table of contents will include all text that is formatted as the style Heading 1, Heading 2, or Heading 3.

FIGURE 4.23 Table of contents inserted into Section 2

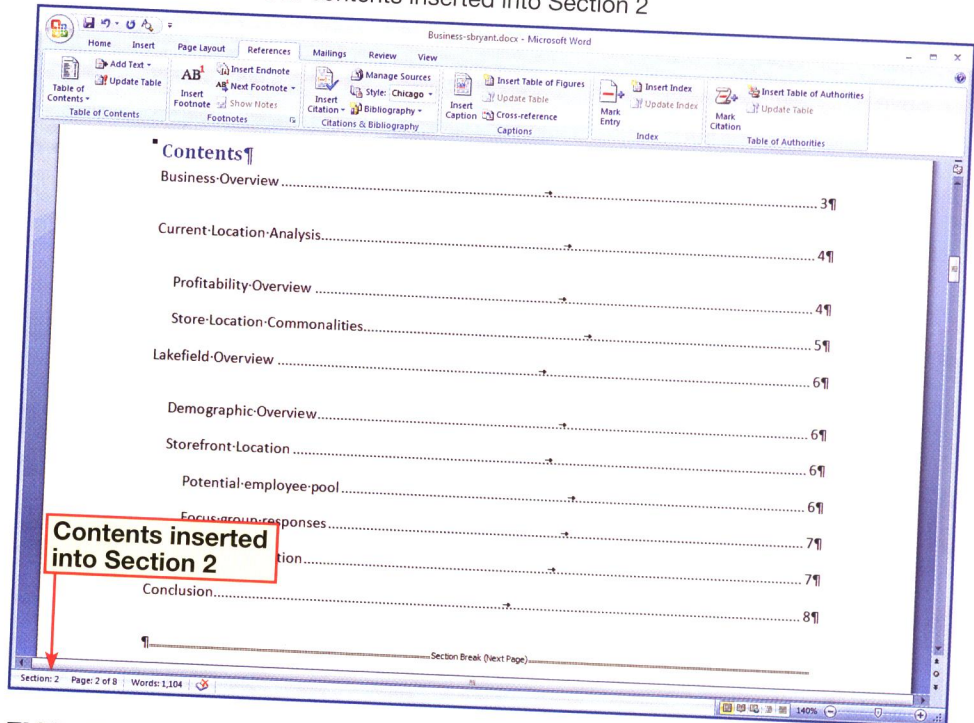
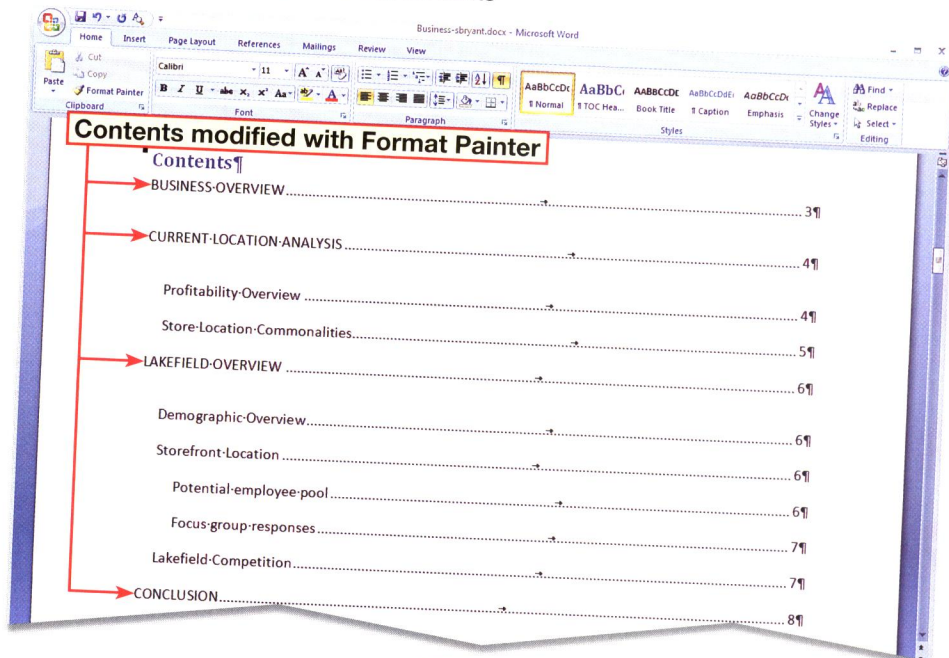


FIGURE 4.24 Modified table of contents



Step-By-Step

- 1** In your **Business** file, press **CTRL** + **HOME**. Choose **Insert>Header & Footer>Header>Edit Header**.
- 2** Under **Header & Footer Tools>Design>Options**, check **Different First Page**.
- 3** **CHECK** Your screen should look like Figure 4.25. Click **Header & Footer Tools>Design>Navigation>Next Section**. With the insertion point in the Section 2 header, in the **Navigation** group, click **Link to Previous** to deselect it. Delete the header text.
- 4** **CHECK** Your screen should look like Figure 4.26. In the **Navigation** group, click **Go to Footer**.
- 5** With the insertion point in the Section 2 footer, deselect **Link to Previous**.
- 6** In the **Header & Footer** group, choose **Page Number>Current Position>Plain Number**.
- 7** Choose **Insert>Header & Footer>Page Number>Format Page Numbers**.

➔ *Continued on the next page.*

EXERCISE 4-13

Format Different Sections in a Document

Section breaks can help you to create an appropriate header and footer for each part of a formal report. The first page of a formal report should not display any header or footer information. Other introductory pages, such as the table of contents, should display a roman numeral in the page's footer. Unlinking headers and footers from other sections allows you to change headers and footers on individual pages in the document while leaving others unchanged.

FIGURE 4.25 Page number removed from Section 1 header

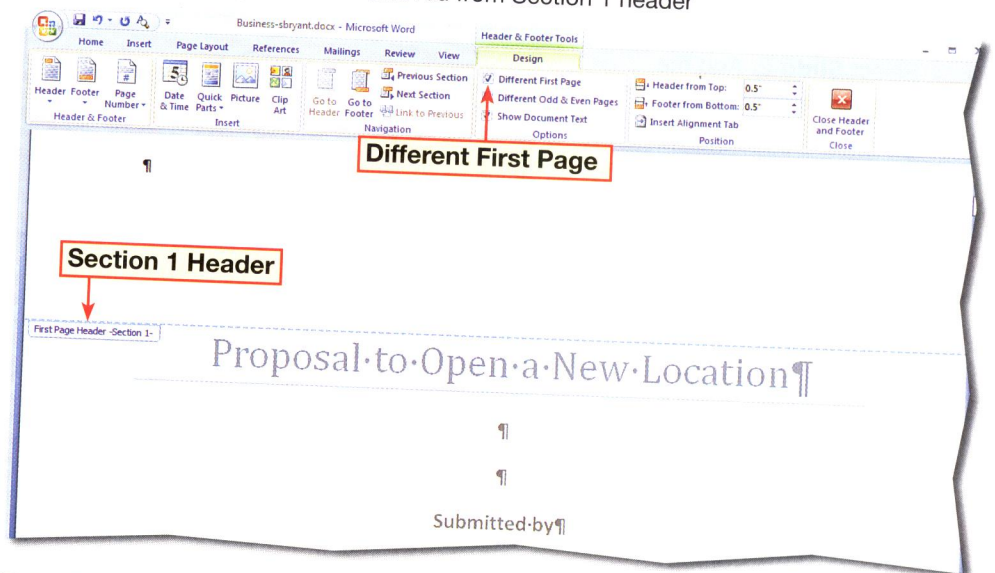
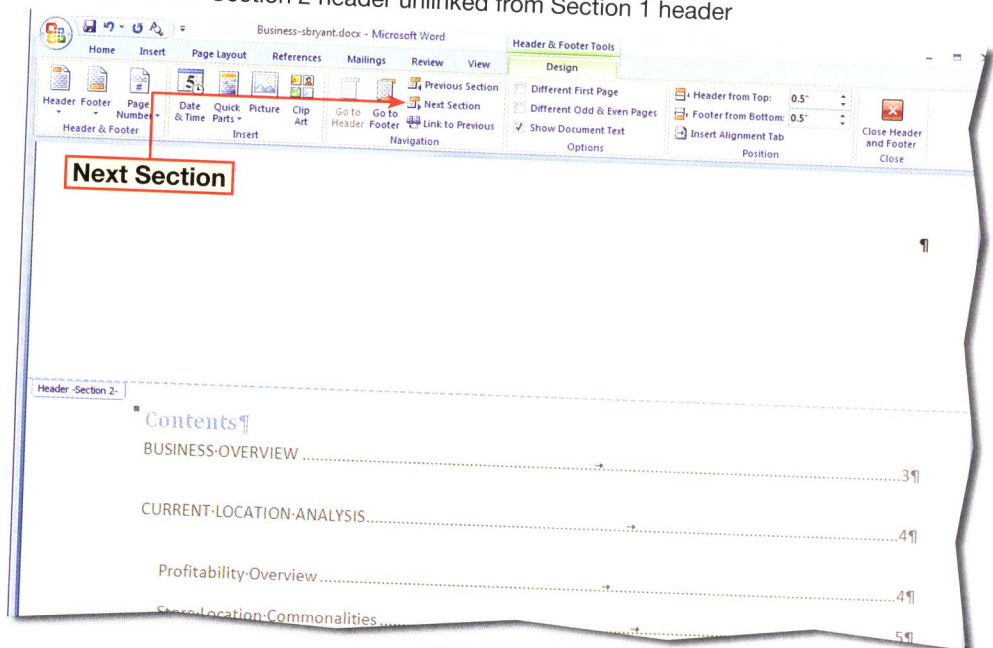


FIGURE 4.26 Section 2 header unlinked from Section 1 header



Step-By-Step

8 In the **Page Number Format** dialog box, under **Number format**, select **i**, **ii**, **iii**. In **Page numbering**, click the **Start at** box and key: **ii**. Click **OK**. In the footer, select **ii**. In the mini toolbar, click **Center**. Deselect the text.

9 **CHECK** Your screen should look like Figure 4.27. Click the Section 3 header. Deselect **Link to Previous**.

10 Key: **Lakefield Store Proposal**. Press the spacebar once. Choose **Insert>Header & Footer>Page Number>Current Position>Plain Number**.

11 Select the number. Choose **Insert>Header & Footer>Page Number>Format Page Numbers**. Under **Page numbering**, click the **Start at** box. Key: **1**. Click **OK**. Deselect the text.

12 **CHECK** Your screen should look like Figure 4.28. Click the Section 3 footer. Deselect **Link to Previous**. Delete the page number. Click **Close Header and Footer**. Save your file.

➔ Continue to the next exercise.

EXERCISE 4-13 (Continued) Format Different Sections in a Document

FIGURE 4.27 Roman numeral added to Section 2 footer

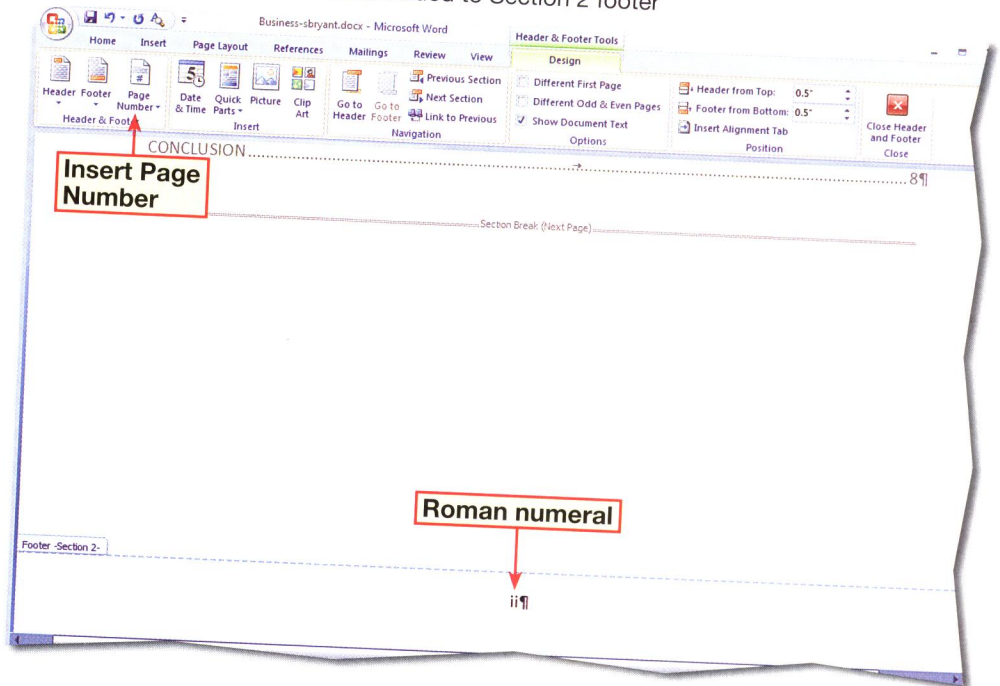
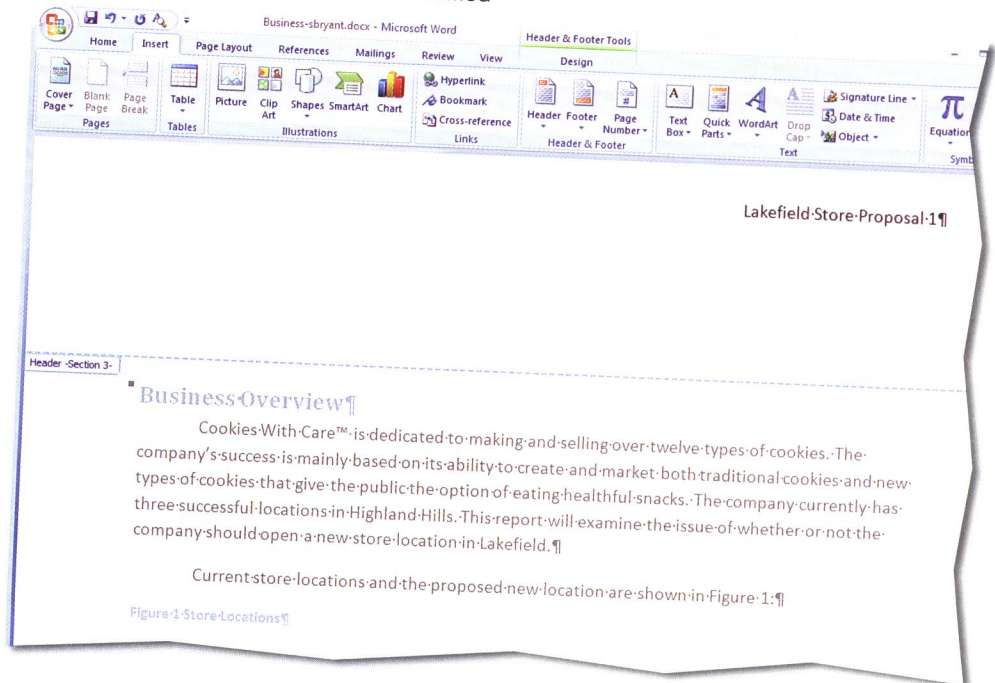


FIGURE 4.28 Section 3 header modified



Step-By-Step

- 1 In your **Business** file, go to Page 5.
- 2 In the first paragraph, click after the text **commented:**. Press **ENTER**.
- 3 Select the entire quote (starts with **My family** and ends with **With Care™!**). Choose **Home>Paragraph>Dialog Box Launcher**.
- 4 In the **Paragraph** dialog box, set the **Left** and **Right Indentation** to **0.5"**. Set **Special** to **(none)** (see Figure 4.29). Click **OK**. Deselect the text.
- 5 **CHECK** Your screen should look like Figure 4.30. Save your file.

Continue to the next exercise.

Academic Skills

You should limit the number of long quotations in your academic or business reports and aim to keep most quotations about one sentence long. Block quotes should only be included if they represent an important idea that cannot be condensed or paraphrased.

EXERCISE 4-14 Format Long Quotations

A long quotation, or block quote, that runs four or more lines requires special formatting. Do not use quotation marks. Instead, indent the quote a half-inch from each side margin and leave a blank line above and below it. You should also remove the first line indentation from the long quote and remaining paragraph, since they are not new paragraphs.

FIGURE 4.29 Paragraph dialog box

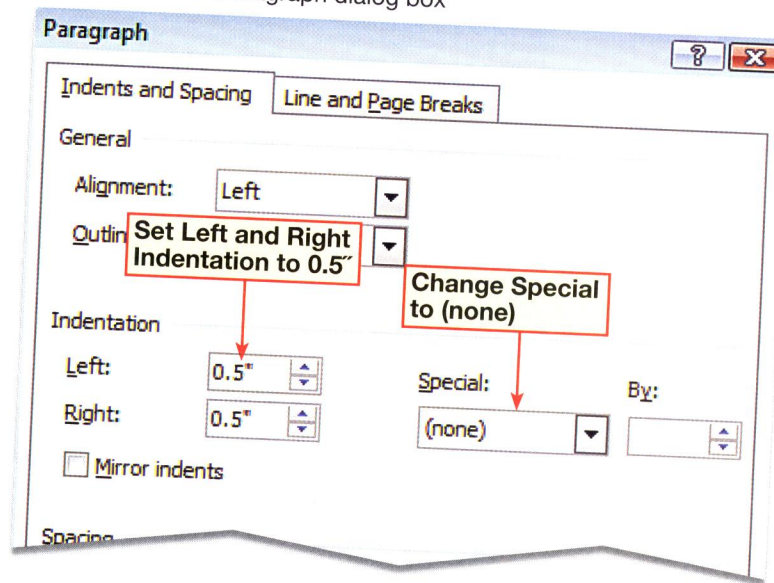
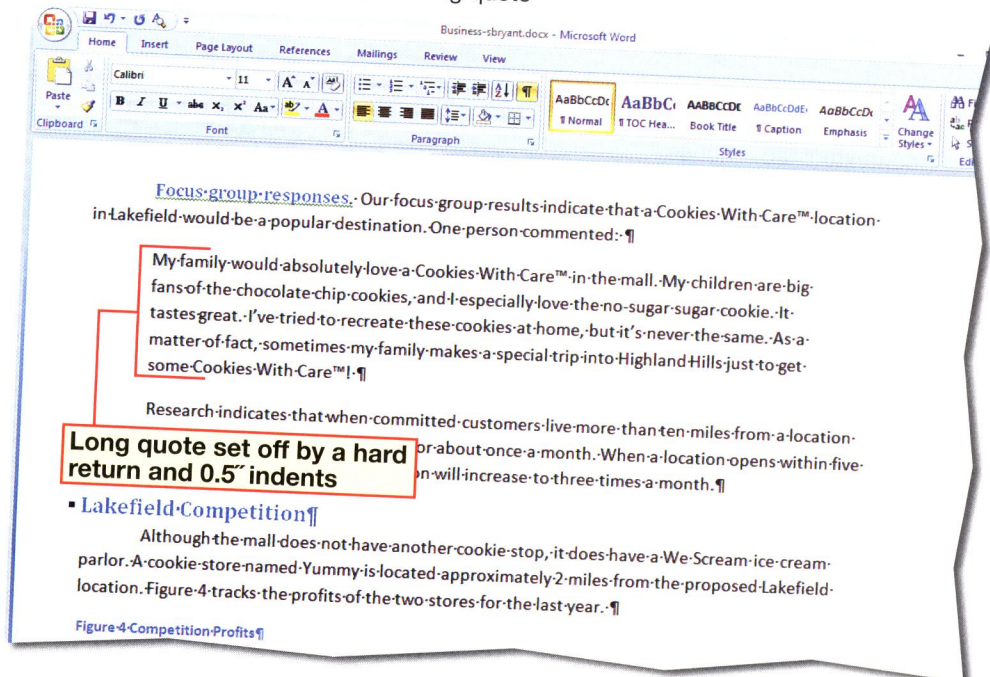


FIGURE 4.30 Properly formatted long quote



Step-By-Step

1 In your **Business** file, choose **References > Citations & Bibliography > Style**. Click the **Style** drop-down arrow and select **Chicago**.

2 Go to Page 5. Click after the sentence that ends with the text **three times a month**. Be sure to click before the period.

3 Choose **References > Citations & Bibliography > Insert Citation > Add New Source**.

4 In the **Create Source** dialog box, under **Type of Source**, select **Book Section**.

5 Fill out the remaining fields as shown in Figure 4.31. Press **TAB** to navigate among the fields. Click **OK**.

6 **CHECK** Your screen should look like Figure 4.32. Save your file.

Continue to the next exercise.

Microsoft Office 2007

The **Style** menu lets you apply different formatting to citations. Business reports often use the Chicago style. MLA style is used for academic reports.

EXERCISE 4-15

Select Reference Styles and Add a Citation Source

Word 2007's Citations & Bibliography tool allows you to log, or record, your citation sources as part of your file. You can insert and reuse multiple properly formatted citations.

FIGURE 4.31 Create Source dialog box

Create Source

Type of Source: Book Section

Bibliography Fields for APA

Author: Hahn, Jack [Edit]

Corporate Author

Title: Using Focus Groups

Book Author: [Edit]

Book Title: Collected Business Essays

Year: 2009

Pages: 384

City: New York

Publisher: All Biz Publishing

Show All Bibliography Fields

Tag name: Hah091

The Tag Name will be used to uniquely identify this source.

OK Cancel

FIGURE 4.32 The source has been added as an inline citation.

Business-sbryant.docx - Microsoft Word

Home Insert Page Layout References Mailings Review View

Table of Contents Add Text Update Table Table of Contents

Insert Endnote Next Footnote Footnotes

Manage Sources Style: Chicago Insert Citation Bibliography Citations & Bibliography

Insert Table of Figures Update Table Captions

Insert Index Update Index Mark Entry Update Index Mark Citation Table of

matter-of-fact, sometimes my family makes a special trip into Highland Hills just to get some Cookies-With-Care™.

Sources formatted to Chicago Manual of Style

Research indicates that when committed customers live more than ten miles from a location they will visit a store somewhat frequently, or about once a month. When a location opens within five miles of their home, visits to the new location will increase to three times a month (Hahn 2009).

▪ **Lakefield Competition**

Although the mall does not have another cookie stop, it does have a We Scream ice cream parlor. A cookie store named Yummy is located approximately 2 miles from the location. Figure 4 tracks the profits of the two stores for the last year.

Inline citation added to report


Figure 4-Competition Profits

sands of Dollars

□ We Scream

■ Yummy

Step-By-Step

- 1 In your **Business** file, press **CTRL** + **END**.
- 2 Choose **Insert>Pages>Blank Page** .
- 3 Choose **References>Citations & Bibliography>Bibliography>Bibliography** (see Figure 4.33).
- 4 Select the publication month, day, and year **August 12, 2010** in the first citation. Press **DELETE**. Key: **July 2009**.
- 5 **iCHECK** Your screen should look like Figure 4.34.
- 6 Save your file.

 Continue to the next exercise.

Academic Skills

Summarizing or paraphrasing ideas from a source without a citation is a form of plagiarism. You should cite sources even when you are not using a direct quotation in your documents. Think of a citation as a tool for giving credit to a source, not just for his or her words, but also for his or her ideas.

EXERCISE 4-16 Insert a Bibliography

After you have added all of your sources and citations, you can create a **bibliography**. A bibliography is a list of works cited in a report. At the click of a button, Word 2007's Citations & Bibliography tool compiles all your source information and formats a bibliography or works cited list that matches the reference style you have chosen.

FIGURE 4.33 Bibliography options

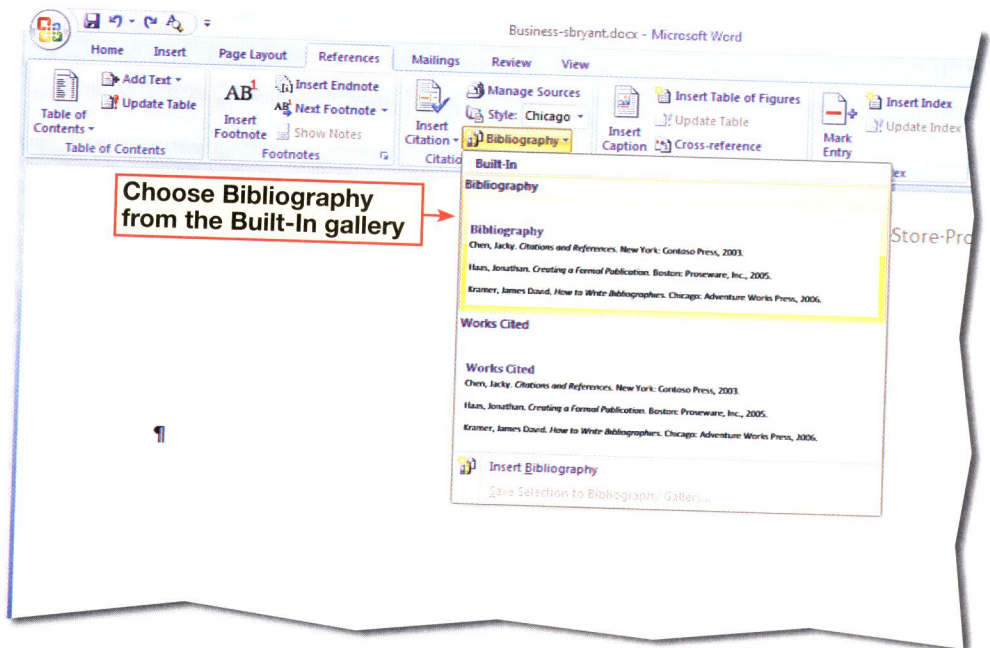
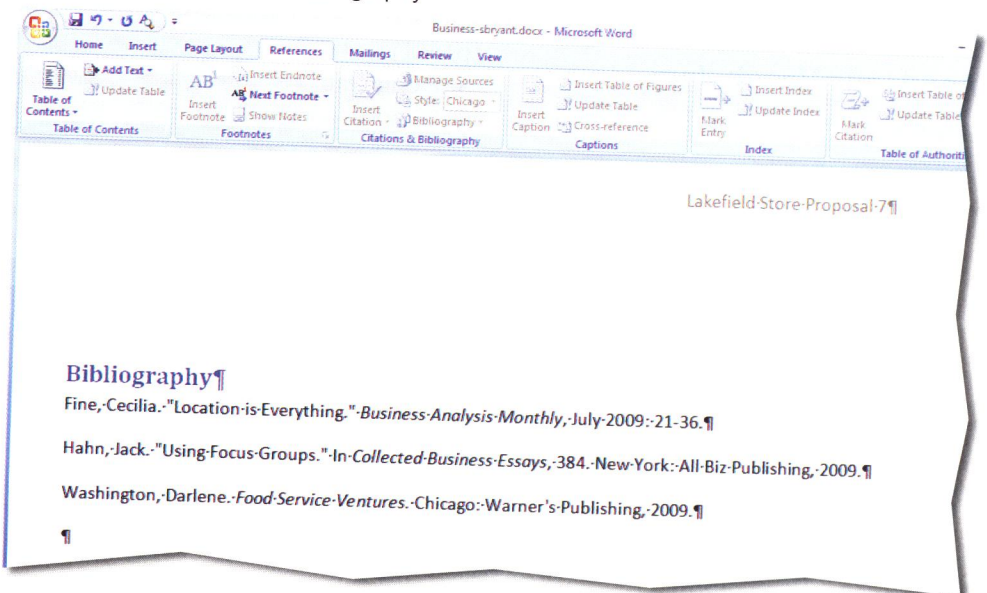





FIGURE 4.34 Inserted bibliography



Step-By-Step

- 1 In your **Business** file, go to Page ii. Click anywhere inside the table of contents.
- 2 Choose **References> Table of Contents> Update Table** .
- 3 In the **Update Table of Contents** dialog box, choose **Update entire table**. Click **OK**.
- 4 **iCHECK** Your screen should look like Figure 4.35. Notice that the **Bibliography** page has been added to the table of contents.
- 5 Select the text **Business Overview**. Choose **Home>Font>Dialog Box Launcher** . Check **All Caps**. Click **OK**.

- 6 With the text still selected, double-click **Format Painter** . Select **Current Location Analysis, Lakefield Overview, Conclusion, and Bibliography**.

- 7 Click **Format Painter** once. Deselect the table of contents.

- 8 **iCHECK** Your screen should look like Figure 4.36. Save your file.

 Continue to the next exercise.

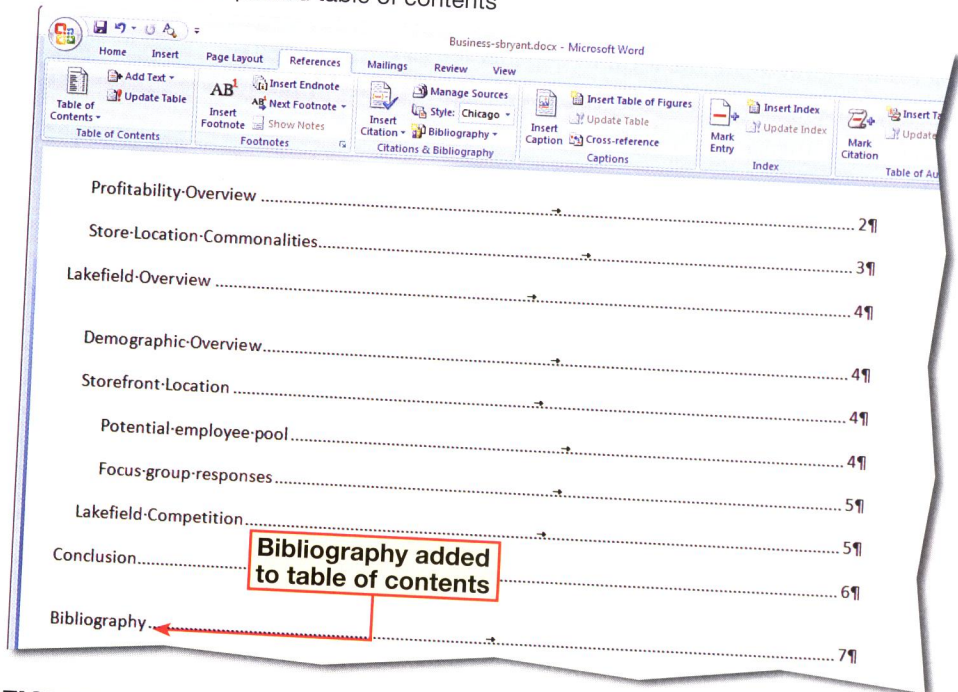
Lesson 4: Exercise 4-17

EXERCISE 4-17 Update a Table of Contents



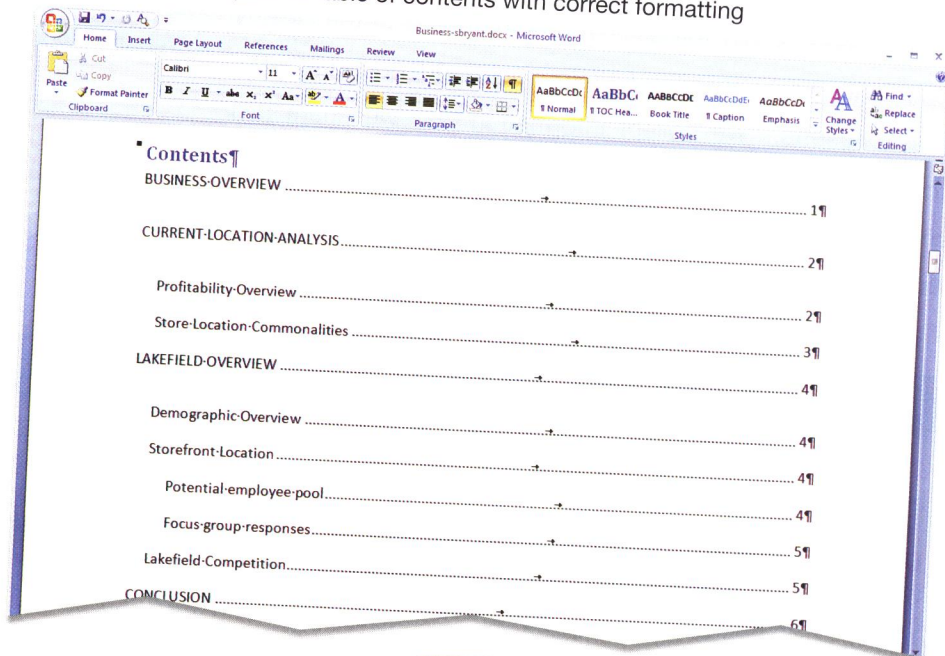
Headings, page numbers, and sections often change as you create and revise a document. Each time these changes occur, you should update the table of contents. Use Reveal Formatting to identify the different headings used in a document, and to apply heading styles as needed to selected text.

FIGURE 4.35 Updated table of contents



Profitability-Overview	2
Store-Location-Commonalities.....	3
Lakefield-Overview	4
Demographic-Overview.....	4
Storefront-Location	4
Potential-employee-pool.....	4
Focus-group-responses.....	5
Lakefield-Competition.....	5
Conclusion.....	6
Bibliography.....	7

FIGURE 4.36 Updated table of contents with correct formatting



Contents	
BUSINESS-OVERVIEW	1
CURRENT-LOCATION-ANALYSIS.....	2
Profitability-Overview	2
Store-Location-Commonalities	3
LAKEFIELD-OVERVIEW	4
Demographic-Overview	4
Storefront-Location	4
Potential-employee-pool.....	4
Focus-group-responses.....	5
Lakefield-Competition.....	5
CONCLUSION	6

Step-By-Step

1 In your **Business** file, choose **Office>Prepare>Properties**.

2 The **Document Information Panel** opens above your document. Click **Document Properties** and select **Advanced Properties**.

3 In the **Document Properties** dialog box, click the **Summary** tab.


4 In the **Title** box, key: **Proposal to Open a New Location**.

5 In the **Subject** box, key: **Lakefield Storefront Proposal**.

6 In the **Author** box, key: **Tina Yee**.

7 In the **Company** box, key: **Cookies with Care**.

8 **iCHECK** Your screen should look like Figure 4.37. Click **OK**.

9 In the upper-right corner of the **Document Information Panel**, click **Close**  to close the panel. Save your file.

➔ *Continue to the next exercise.*

EXERCISE 4-18

Review and Modify Document Properties



Properties help to define and describe a document, such as title, subject, or author. Properties stay with a document from computer to computer and can be viewed by anybody. You might add properties to an official business document to identify it as a draft or to distinguish it from a similar document. Word allows you to save properties and document information through the Document Information Panel.

FIGURE 4.37 Modified Document Summary

The screenshot shows the 'Business-sbryant.docx Properties' dialog box with the 'Summary' tab selected. The fields are filled with the following information:

- Title: Proposal to Open a New Location
- Subject: Lakefield Storefront Propodal
- Author: Tina Yee
- Manager: (empty)
- Company: Cookies with Care
- Category: (empty)
- Keywords: (empty)
- Comments: (empty)
- Hyperlink base: (empty)
- Template: Normal.dotm

At the bottom, there is an unchecked checkbox labeled 'Save Thumbnails for All Word Documents' and 'OK' and 'Cancel' buttons.




You Should Know

Document properties can be used by individuals and by companies to summarize contents, identify authors, and to highlight important changes to document drafts.

Tech Tip

File properties are not actually associated with a file until that file is saved.

Step-By-Step

- 1 In your **Business** file, scroll until the top of Page ii is at the top of your screen.
- 2 Choose **View>Window>Split** . Click near the middle of the document pane.
- 3 In the bottom pane, click **Select Browse Object** . Click **Browse by Heading** .
- 4 **iCHECK** Your screen should look like Figure 4.38.
- 5 Choose **Window>Remove Split**.
- 6 **iCHECK** Your screen should look like Figure 4.39. Save your file.

➔ Continue to the next exercise.

Academic Skills

Using a split screen can help you to double-check your work without having to scroll back and forth through a long document.

EXERCISE 4-19 Split Windows and Arrange Panes



When you split the window, the Word screen is divided into two panes that you can scroll independently. Splitting the window is useful when you need to compare different parts of a document. For example, you can make sure your table of contents contains all of the formatted headings in your document.

FIGURE 4.38 Split window

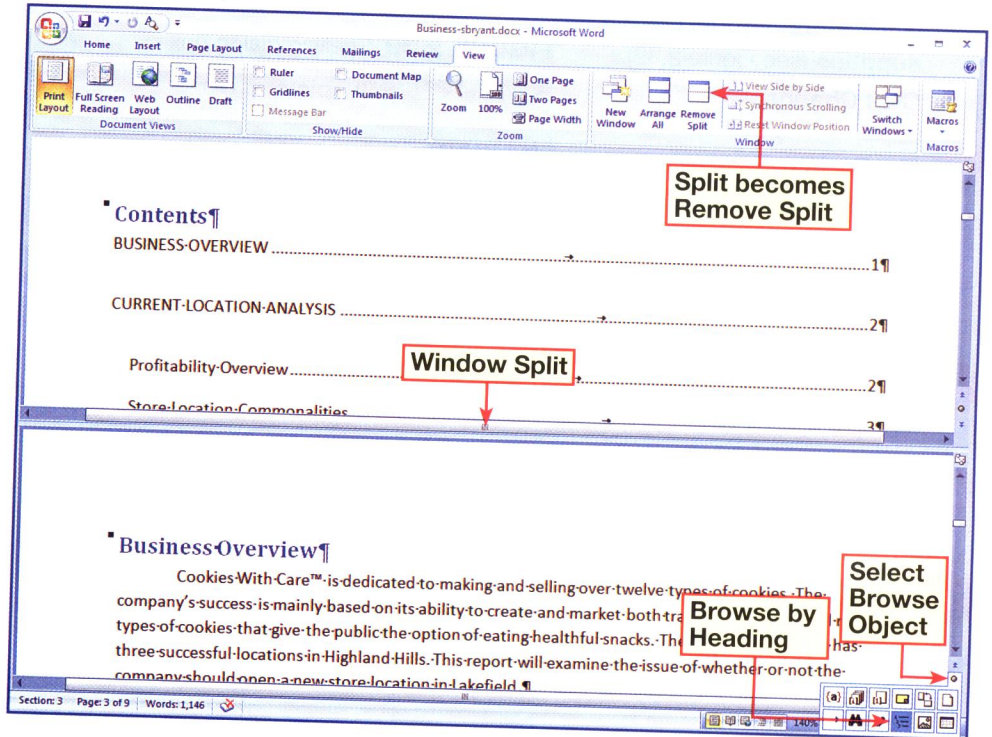
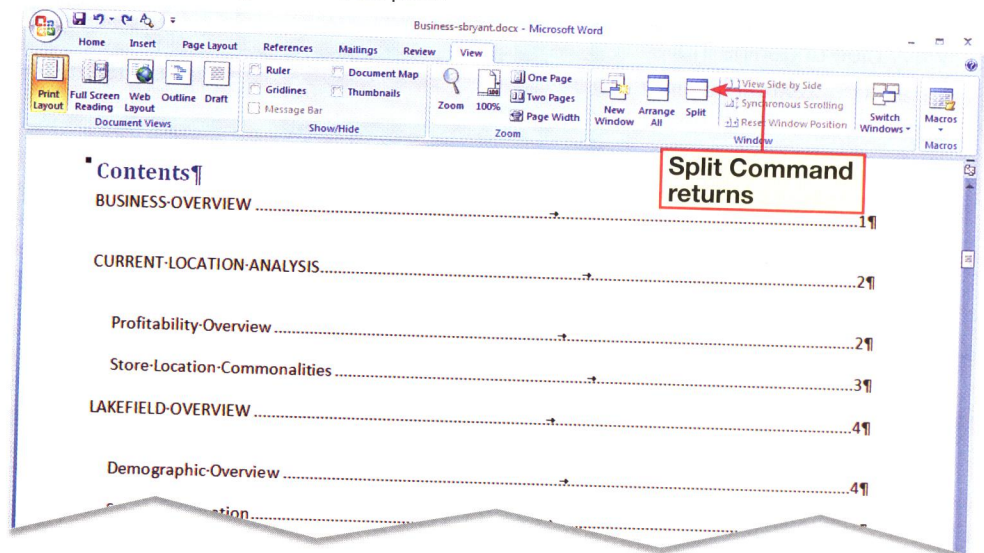


FIGURE 4.39 Single document pane



Step-By-Step

1 In your **Business** file, move to Page 4. Choose **View>Document Views>Outline**. Click in the **Current Location Analysis**.

2 **!CHECK** Your screen should look like Figure 4.40.

3 Switch to **Print Layout** view. Save and close your **Business** file.

4 Locate and open the data file **Report_Outline.docx**. Save as: **Report_Outline-[your first initial and last name]**.

5 At the bottom of the screen, click **Outline View**.

6 Select the first two lines of text. Choose **Outlining>Outline Tools>Promote to Level 1**.

7 Select the next two lines. Click **Demote**. Deselect the text.

8 **!CHECK** Your screen should look like Figure 4.41.

Continued on the next page.

EXERCISE 4-20 Use Outline View



You can use **Outline View** to see the structure of a document. Outline View displays the text in levels—Level 1, then Level 2, and so on. Levels 1, 2, and 3 are equal to the Heading styles 1, 2, and 3. The body text of the document is the lowest level, and is indented furthest to the right in the outline.

FIGURE 4.40 Report in Outline View

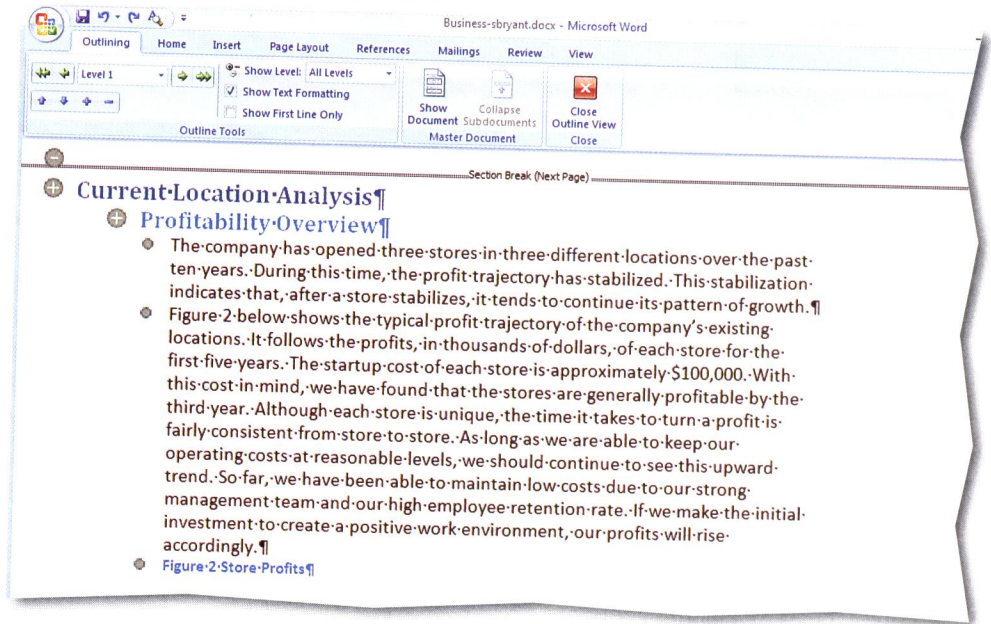
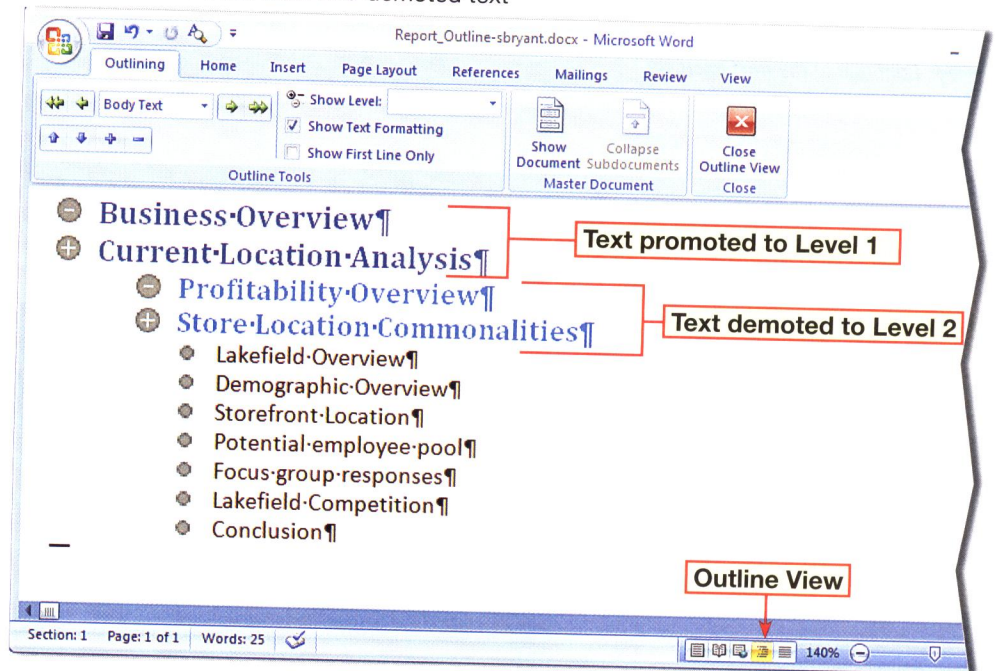


FIGURE 4.41 Promoted and demoted text



Step-By-Step

- 9 Promote the text **Lakefield Overview** to **Level 1**.
- 10 Demote **Demographic Overview** and **Storefront Location** to **Level 2**.
- 11 Select **Potential employee pool** and **Focus group responses**. Click the **Outline Level** drop-down arrow. Click **Level 3**. Deselect the text.
- 12 **iCHECK** Your screen should look like Figure 4.42.
- 13 Promote **Lakefield Competition** to **Level 2**.
- 14 Promote **Conclusion** to **Level 1**. Deselect the text.
- 15 **iCHECK** Your screen should look like Figure 4.43.
- 16 With your teacher's permission, print the outline. Save the file.

Continue to the next exercise.

EXERCISE 4-20 (Continued) Use Outline View



FIGURE 4.42 Level 3 text

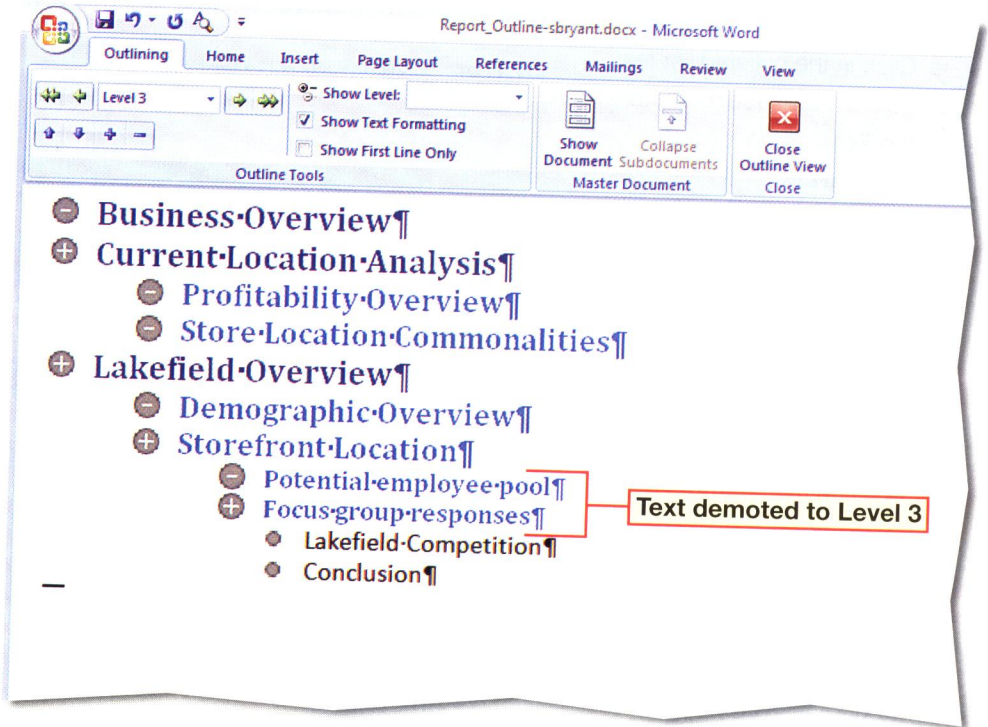
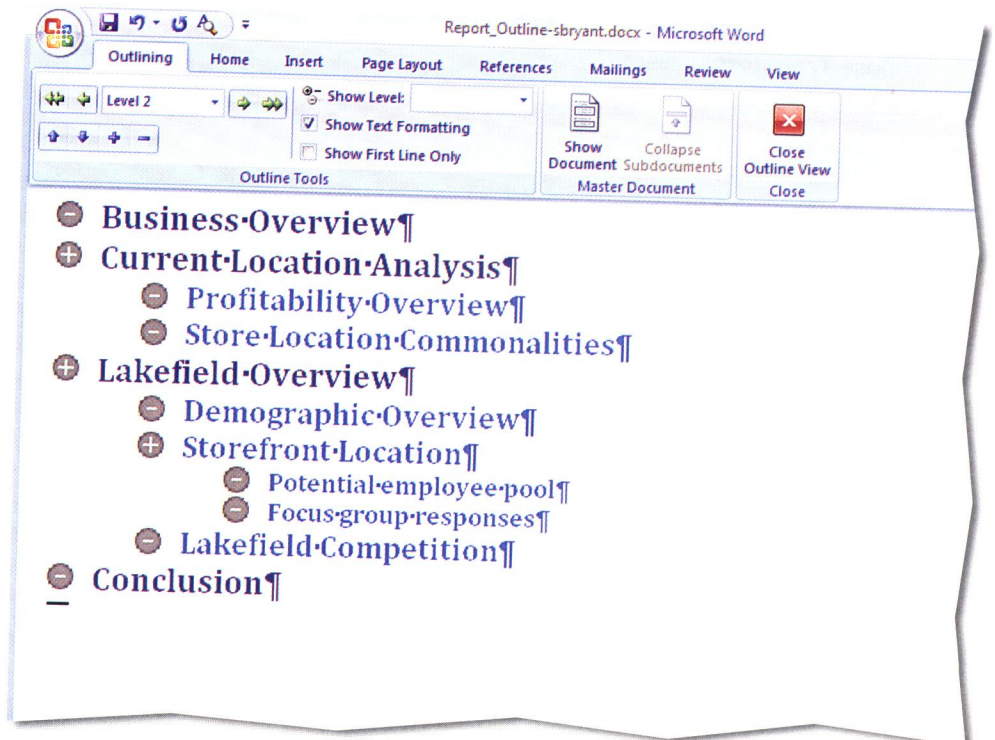





FIGURE 4.43 Final outline



Step-By-Step

- 1 Make sure your **Report Outline** file is open.
- 2 Open your **Business** file.
- 3 In your **Business** file, select **View>Window>View Side by Side** .
- 4 **CHECK** Your screen should look like Figure 4.44.
- 5 Scroll down. Notice that the two documents move together.
- 6 Click anywhere in the **Report Outline** file. Select **View>Window>Reset Window Position** .
- 7 **CHECK** Your screen should look like Figure 4.45.
- 8 Click anywhere in the **Report Outline** file. Select **View>Window** and click **View Side by Side**  to deselect it. Save and close both files.

EXERCISE 4-21

Arrange Open Windows



You can open more than one document at a time in order to compare them. Comparing two open documents side by side allows you to scroll through both documents at the same time. (You can also compare documents on two panes split horizontally.)

FIGURE 4.44 Two documents viewed side by side

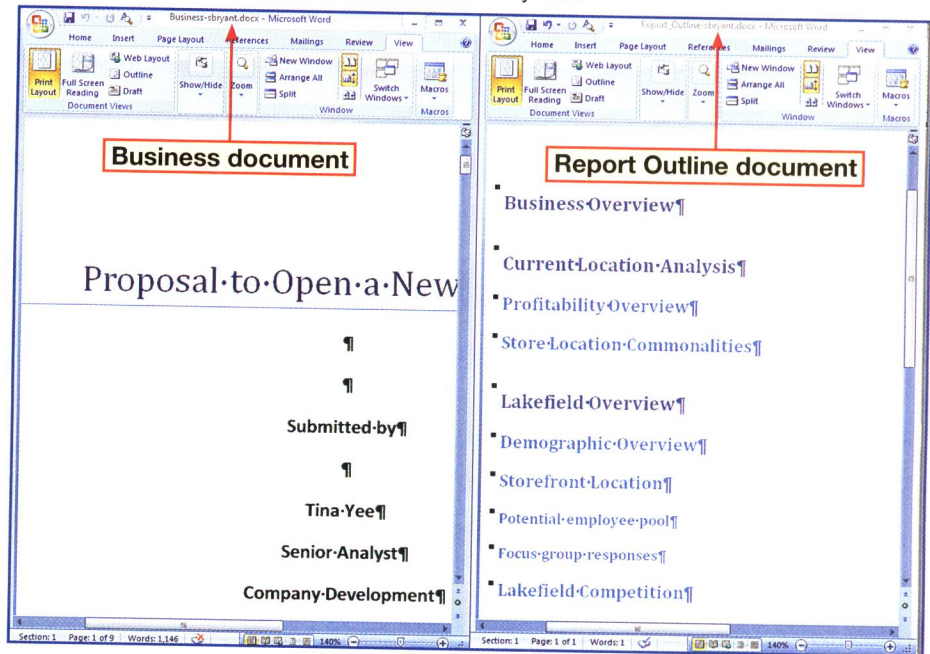


FIGURE 4.45 Window positions reversed

