Berger Design Group

Pointing You to Your Future Home

Style Guide



Style Guide

This style guide was created in October 2011 by Alyssa Berger for the use of the independent home design company Berger Design Group at the request of manager Steve Berger.

About this Document

This document outlines the styles and document layouts used by Berger Design Group. By following this guide, the flow of consistency between and within documents will be guaranteed. This guide's purpose is to provide a standard reference for all styles, layouts, and graphics, as well as templates for specific documents used by Berger Design Group. This guide will ensure the continued consistency, conciseness, and functionality of Berger Design Group as well as maintain our credibility among our affiliated companies.

- 2 -28/10/2011

Table of Contents

DOCUMENT HIERARCHY	5
FONT	5
TITLES	5
Single-page documents	
Multi-page documents	5
HEADINGS	5
Heading 1	5
<u>Heading 2</u>	5
Headings 3 and 4	5
TEXT EFFECTS	6
BOLDING	6
<u>ITALICS</u>	6
<u>Underlining</u>	6
DESIGN LAYOUTS	7
PAGE LAYOUT	
TEXT ALIGNMENT	
COLOURS	
Text Colours	
Background Colours	
HEADERS AND FOOTERS	
GRAPHICS	
<u>Tables/Charts/Diagrams/Graphs</u> Photos	
TABLES	
Hierarchy	
Alianment	
Colours	
Table Styles	
Alternative Table Format	
BULLET/NUMBERED LISTS	
CAUTION/HELP BOXES.	
<u> </u>	
WRITING STANDARDS	11
CAPITALIZATION	11
SPELLING	11
ABBREVIATIONS	11
Abbreviations	11
Acronyms	11
Berger Design Group	11
CONTRACTIONS	11
<u>Sentences</u>	12
Paragraphs	12
NUMBER AND PUNCTUATION STANDARDS	- 12
NUMBERS	
PHONE NUMBERS	
MONEY	
DATE AND TIME	
MEASUREMENT SYSTEMS	
Imperial	
Metric	
PUNCTUATION	
Periods and Commas	
<u>Dashes</u>	
<u>Exclamation</u>	14

<u>Brackets</u>	15
Quotations	15
REFERENCING	- 15
<u>Articles</u>	
<u>BOOKS</u>	
WEBSITES	
GRAPHICS	15
DOCUMENT TYPES	16
E-MAILS	- 16
Styles	
Greetings	
Signatures	
Attachments	
LETTERS	
INVOICES	
POLICIES	
PROCEDURE DOCUMENTS	
PROCESS DOCUMENTS	
BROCHURE FLOOR PLANS	
Purpose	
Style	
Alternative	
Drawings and Site Plans	
Purpose	
Program	
Title Block	
WORD DOCUMENTS.	
DOCUMENT CONTROL	
FILING DOCUMENTS	
SAVING DOCUMENTS – FOLDER TITLES. General Documents	
Secific Documents Saving Documents – Document Titles	
General Documents	
Specific Documents	
REVISIONS.	
DOCUMENT RELEASE	20
Mailing	20
E-MAILING	20
COURIER	20
DESIGN LAYOUT SAMPLE	21 ·
INVOICE SAMPLE	- 22
LETTER SAMPLE	
POLICY SAMPLE	
PROCEDURE SAMPLE	
PROCESS SAMPLE	26

Document Hierarchy

Font

All Berger Design Group documents must have the font Calibri set as the default. For standard body text, such as this sentence, the font size must be 11-pt with no text effects.

Titles

Single-page documents

Titles must be Calibri bolded between 18 and 22-pt size. The title must be centered at the very top of the page.

Multi-page documents

The main title of the document must be Calibri bolded, between 22 and 26-pt size. The title must be centered on the page and may appear anywhere in the upper half of the first page of the document. Specifics regarding titles on other pages within multi-page documents are consistent with the guidelines for single-page documents.

Headings

Heading 1

(First Heading)

Headings dividing sections of a document must be bolded Calibri, 18-pt. The heading must be left-aligned on the page, and there must be a space between the heading and the following text. (On this page, an example of Heading 1 is the text 'Document Hierarchy'.)

Heading 2

(Subheading)

The size for subheadings of documents is Calibri 12-pt bolded. A space must be added between the subheading and the following text.

(On this page, an example of Heading 2 is the text 'Titles'.)

Headings 3 and 4

(Sub-subheadings)

If a second subheading is required it must be Calibri 11-pt, bold. If a third subheading is required in a document, the same format must be used with italics, rather than bold. The second subheading must be tabbed away from the edge of the page once, and the third subheading must be tabbed twice.

(On this page, an example of Heading 3 is the text 'Single-page documents'.)

NOTE: it is possible to make headings and subheadings coloured (see 'Colours').

- 5 - 28/10/2011

Style Guide

Text Effects

Text effects (marching ants, blinking lights, etc.) may never be used in any company documents.

Bolding

Bolding is to be used for headings and subheadings as well as for emphasis on certain words in a document. (Example: The dog was **very** tired that day.) Overuse of bolding, or bolding of complete sentences, is not acceptable. The exception is for the use of a warning label (see 'Caution/Help Boxes'), and for headers and footers which may be bolded if desired.

Italics

Italics are not permitted to be used for emphasis in any documents. They are only permitted to be used when the title of a published material, song, book, or film is referenced (see 'Referencing') or for the purpose of sourcing a picture or graphic (see 'Graphics'). Italics may also be used in headers and footers (see 'Headers and Footers').

Underlining

Underlining for emphasis in documents is not acceptable at any time. Underlines are only to be used for web addresses in the form of hyperlinks (i.e. visit www.google.ca) or when websites are being referenced (see 'Referencing').

NOTE: See the <u>Design Layout Sample Page</u> for examples regarding layout.

- 6 - 28/10/2011

Design Layouts

Page Layout

All pages of all documents require a minimum of a 1-inch margin around each side of the page. No text or graphics are permitted to extend into this required space. Avoid the use of centering objects on the page, with the exception of titles; choose instead to right or left align.

Text Alignment

Solid paragraphs or blocks of text must never be justified and they may be left aligned only. Rightaligning is acceptable for instances where text is wrapped around a graphic on the left side of the page (see 'Graphics') or for letter templates (see 'Letters').

Colours

Text Colours

Text colours may only be used for headings or subheadings in a document if the colours are obvious on the page; dark blue or green is the most acceptable. If you are unsure, check with your manager. Text colours may only be used when the documents are being sent off-site; an example is a brochure. Colours are not necessary for in-company purposes. The exception to this rule is help boxes (See 'Caution/Help Boxes').

Background Colours

Background colours and/or full bleeds may not be used with the exception of title pages of multi-page documents. If any text colours are used you must ensure that they are noticeable against the background; all background colours used must be pale in order to set off dark text. As with text, background colours should only be used when the documents are being sent offsite; colours are not necessary for in-company purposes.

Headers and Footers

Headers and footers must be in Calibri 11 or 12-pt. Bolding and/or italics are permitted if desired. All headers and footers must be consistent within each document; they are not required on covers or title pages of multi-page documents or at all on single-page documents.

Headers

Each header must have the text 'Berger Design Group' on the left, and the title of the document (i.e. 'Style Guide') on the right. Note this page as an example.

Footers

The footer must have the page number of the document on the left and the date of printing on the right. The page number must be in the format -1-, -2-, -3-, etc. For documents that will be fixated back-to-back, ensure that your footer is set up with odd and even settings so the page number is always on the outside page. The date must be in the format Day/Month/Year. EXAMPLE: January 21st, 2011 = 21/01/2011

- 7 - 28/10/2011

NOTE: See the <u>Design Layout Sample Page</u> for examples.

Graphics

Any pictures, tables, or diagrams used in documents should be made as small as possible in the document, and should always be black and white unless it is completely necessary to have them in colour. Graphics may be placed anywhere on a page, depending on the document, but they must always be in line with the text and must have at least a ½ inch margin of white space around each side.

Tables/Charts/Diagrams/Graphs

A title is required for tables and charts, which should be consistent with the subheading format (see '<u>Document Hierarchy'</u>) and aligned with the top left of the graphic. If sourcing is required, ensure that the source is left-justified in 11-pt italicized Calibri below the graphic. For specifics regarding the design of tables see '<u>Tables</u>' below.

Photos

Photos are not required to have a heading, but sourcing is mandatory (see 'Referencing'). Ensure that the source is left-justified in 11-pt italicized Calibri below the graphic.

Tables

Hierarchy

Tables must contain as few columns and rows as possible in order to convey the necessary information. The format for headings in a table must be Calibri 12-pt bold. The body text for the tables must be the standard body text for all documents (see 'Document Hierarchy').

Alignment

Each table must be centered on the page(s) of the document, unless it is a very small table which can have text running beside it, in which case it should be left-justified. The individual cells in the tables should be left-aligned and not fully justified. The exception is for headers, which may be either left-justified or centered.

Colours

Background

Colours used in tables should be limited and only used when necessary. In a large table where an abundance of text would be confusing to the reader (more than 4 columns or more than 10 rows) background colors that alter between columns or rows is allowed. The only acceptable background colors for tables are pale colors, which makes it easier to use plain black text on top.

Text

Coloured text is not allowed in tables; if emphasis is needed in tables, the size of the text may alter between 11-pt and 12-pt, or text may be bolded sparingly.

- 8 - 28/10/2011

Table Styles

The outside border of all tables must be a double line set at 1½ pt thickness. The interior lines of the table must be a single line, no thicker than ¾ pt thickness. If desired, the bottom line of the first row may also be double-lined in order to separate the headings from the rest of the text.

Example 1

The example below uses the proper table style and formatting; a 12-pt font is used for the headings and 11-pt is used for the body text. The heading row of the table is also bolded.

Fruits	Vegetables	Milk Products	Meat Products
Apples	Carrots	Yogurt	Salami
Bananas	Broccoli	Cheese	Beef
Peaches	Asparagus	Sour Cream	Chicken

Alternative Table Format

An alternative to the table above is a table where the headings are in the first column instead of the first row. The format for the first row of headings in the previous example may be transferred to the first column in this format.

Example 2

Note that in this format, the table's headings are still Calibri 12-pt bold, and the body text is Calibri 11-pt standard. Also note that the double line has been moved to separate the headings from the main text.

Fruits	Apples	Bananas	Peaches
Vegetables	Carrots	Broccoli	Asparagus
Milk Products	Yogurt	Cheese	Sour Cream
Meat Products	Salami	Beef	Chicken

Bullet/Numbered Lists

Bullet Lists

Two different types of bullet lists are acceptable. The first is the simple round dot; this is used for lists of items. The second is an arrowhead, which is used for checklists. Text in bullet lists may never end with a period unless it is a complete sentence. A space must be used between the title of the list and the bullets, but is not required between each bullet. If a list must be created which requires sub-sections, use a numbered list (see below).

List 1: Animals

- Cat
- Dog
- Mouse

- 9 - 28/10/2011

List 2: Things to do in the Morning

- Get dressed
- Brush teeth
- Eat breakfast

Numbered Lists

The only acceptable format for numbered lists is the 'number-period' format (i.e. 1.); however if sub-sections are required for numbered lists, lower-case letters may be used, in the 'lowercase-right bracket' format. A blank space must be added between the title of the list and the beginning of the numbers, as well as between each numbered item, but not between lettered sub-sections. Note the example:

List of Animals

- 1. Mammals
 - a) Dog
 - b) Cat
- 2. Amphibians
 - a) Frog
 - b) Toad
- 3. Marsupials
 - a) Kangaroo
 - b) Koala

Caution/Help Boxes

In procedure documents or process documents during which caution, assistance, or a warning is required, use the Calibri, 14-pt red, bolded format to write the necessary text. The label (i.e. caution or warning) should be in all capitals, followed by a colon. The text should then be surrounded by a black border with a 1½-pt thick line. Note the example:

CAUTION: Small parts not intended for children under 3 years of age.

- 10 -

Writing Standards

Capitalization

Capitalization is required for the beginning of sentences, proper nouns such as names and places, abbreviations (see 'Abbreviations' for more information), each word of the name Berger Design Group and all other company names as required, the first word of any bullet point or numbered list, and the word 'Internet'. The word 'e-mail' is not written with a capital E unless it is at the beginning of a sentence or list. Job titles are only required to be capitalized when they are part of a signature of a letter or e-mail, or when they are accompanied by the name of a person. For example, the title 'Doctor Smith' or 'Dr. Smith' is correct, but the sentence 'Mr. Smith is a Doctor' is incorrect.

Spelling

All documents should adhere to Canadian-English spelling standards. Words such as 'favourite', 'colour', and 'labour' are spelled with a u. If unsure about the spelling of a word, consult the most recent edition of the Canadian Oxford Dictionary. It can also be accessed online at: http://www.oupcanada.com/reference_trade/canadian_oxford_dictionaries/dictionary_online.html

Words with multiple spellings (i.e. theater and theatre) are usually both accepted and must only remain consistent within documents. If you are unsure, check with your supervisor.

Abbreviations

Abbreviations

Abbreviations are titles or phrases which are referred to only by the first letter of each word such as FBI or CIA. In company documents, abbreviations are not to be spelled with periods between each letter, but they appear in all capitals. The exception is for a.m. and p.m.

Acronyms

Acronyms are abbreviations which form a word, for example: AIDS. Like abbreviations, acronyms do not require periods and should only be spelled in capitals.

Berger Design Group

Berger Design Group is acceptable to be used as an abbreviation (BDG) in specific context only. In an e-mail it is acceptable, but it is only accepted in letters or company documents after having been referred to by the full name. For example, early in the document the text 'Berger Design Group (BDG)' is used and later in the document the text 'BDG' may be used on its own.

If abbreviations or acronyms are created by Berger Design Group or are technical jargon, they must also be typed with full spelling, followed by the use of the abbreviation before it can be used on its own.

Contractions

Contractions should be avoided in documents whenever possible. Choose to say 'I cannot drive' as opposed to 'I can't drive'. This gives all documents a sense of formality, and is also much more polite in letters and e-mails that are to be sent off-site.

- 11 - 28/10/2011

Sentences

Standard sentence lengths may vary, but by no means should sentence fragments or run-on sentences be used. When a sentence extends beyond two lines of text, consider revising and shortening the sentence, or dividing it into two sentences.

Paragraphs

The standard acceptable paragraph length is seven sentences; the maximum must not exceed nine sentences and the minimum must not be less than five.

Number and Punctuation Standards

Numbers

In standard text, numbers should never be spelled out unless it is a single number on its own; numerical digits should be used instead, particularly in cases of measurement.

Correct Example: It was nine a.m. Incorrect Example: It was 9 a.m.

Correct Example: My number is (403) 710-4567.

Incorrect Example: My number is four oh three seven one zero four five six seven.

Phone Numbers

The correct format for phone numbers used at any point is (area code) 000-0000. The format 000-000-0000 is allowed for informal e-mails and letters with the exception of the required signature format. The format of phone numbers must always remain the same within any company documents.

Money

Dollars

In general paragraph writing, if you need to indicate five dollars, you may write it as '\$5' or 'five dollars'. Writing '\$5.00' is only allowed for formal e-mails, invoices, spreadsheets, and letters, and '5 dollars' or '5-dollars' is never acceptable.

Cents

The only acceptable way to indicate cents in standard documents is to write 'ten cents'. Writing '\$0.10' is only acceptable for formal e-mails, invoices, spreadsheets, and letters.

Dollars and Cents

Indicating dollars and cents together must never be written 'five dollars and ten cents'. It must be written '\$5.10' in any document.

- 12 - 28/10/2011

Date and Time

Dates

There are two ways to indicate dates. One is in regular text, and another is used for footers, letters, and invoices.

Regular Text

The date is in the formal 'Month Day, Year' as follows: April 17, 2007. Months are spelled out in full, and the abbreviations 'st', 'nd' and 'th' are not used.

Footers/Letters/Invoices

As is the format of footers, dates are in the format 'day/month/year' only. If we took the example of March 15, 2003, the format would be 13/03/2003. The day and month must be two digits, and the year is four digits.

Times

The standard format for telling time in digital form is 00:00, with a 12-hour clock only. There are no spaces between the numbers and the colon. The only other acceptable way is when time is written out using correct number standards in the midst of a paragraph (see 'Numbers' above).

Measurement Systems

Imperial

Imperial is used for all documents and building designs with the exception of site plans, which are done in metric. The acceptable format for numbers to be portrayed in imperial is as follows:

Inches

Inches are indicated with a double quotation mark.

EXAMPLE: Eleven inches = 11"

Feet

Feet are indicated with a single quotation mark.

EXAMPLE: Six feet = 6'

Feet and Inches

When feet and inches are indicated together, they have an en dash between them.

EXAMPLE: Seven feet and five inches: 7'-5"

Yards

Though used rarely, yards are portrayed as the number of yards with a lowercase yd. EXAMPLE: Twenty yards = 20 yd

- 13 - 28/10/2011

Metric

Metric is used only for site plans; all other documents are required to use imperial.

Millimetres/Centimetres

All millimetres and centimetres are indicated with lowercase mm or cm.

EXAMPLE: Five millimetres = 5 mm EXAMPLE: Thirty centimetres = 30 cm

Meters

Meters are indicated with one lowercase m.

EXAMPLE: 40 meters = 40 m

Punctuation

Periods and Commas

All sentences including periods, commas, colons, and semi-colons never require a space between the end of the word and the punctuation. There is also only one space required between the punctuation and the next word; never two spaces.

Example: Joe felt that, given his current circumstances, Mary should have the job.

Dashes

En Dashes

En dashes (short dashes) are used as hyphens in the middle of words. They are not used between words and there are never any spaces on either side of an en dash.

Correct Example: Joe Smith-Parker went to visit his mother-in-law. Incorrect Example: Joe Smith – Parker went to visit his mother – in – law.

Em Dashes

Em dashes (long dashes) are only used between words and never in the middle of them. There is always a space on either side of an em dash. They may be used for little else than a breaking thought in the middle of a sentence.

Correct Example: My little sister – the one with the blond hair – sat down next to me. Incorrect example: My little sister-the one with the blonde hair-sat down next to me.

Exclamation

Exclamation points may not be used anywhere in company documents. They are acceptable only in letters and e-mails when used appropriately. Multiple exclamation points at the end of a sentence are never acceptable.

- 14 - 28/10/2011

Brackets

There are two kinds of acceptable brackets. The first is the standard half-moon brackets (these ones), and the second is square brackets [these ones]. The first kind is used for standard documents and writing in place of em dashes. The second is only used in invoices or spreadsheets to indicate a negative figure, or for making a change to a direct quotation.

First Example: Bob (the one with brown hair) lent me his stapler.

Second Example: Amount Due on Invoice: [-34.57]. Bob told me that "[Gina] said it was alright."

Quotations

Single-quotations

Single-quotations are only acceptable to be used to indicate an example or a word or phrase which is being defined by the sentence. They are also used for indicating feet.

Example: 'Milky Way' is the name for our galaxy.

Double-quotations

Double-quotations are only used for referencing (see below), indicating inches, or for direct quotations.

Example: John said "I like cake" to me the other day.

Referencing

Berger Design Group uses Chicago Style for referencing. Referencing is required when any document, picture, webpage or other graphic is used in a document that was not created by Berger Design Group.

Note that if there is more than one author of a document, only the first author is required to cite. All dates must be spelled out in full (i.e. April 14, 2005).

Articles

Author (last, first). Date. Title of Newspaper or Periodical. "Complete title of article."

Books

Author (last, first). Year. Complete Title of Book. Publisher. City of Publication: Country of Publication.

Websites

Title of website. URL. Date accessed.

Graphics

Author (full name), Title, Page number, Type of image.

- 15 - 28/10/2011

Document Types

This section outlines the types of documents created by Berger Design Group. There are more documents that are used by the company and more that have the potential to be created, but this is a basic outline of the main types of documents used, what they are used for, and how they are structured.

E-mails

Styles

All e-mails must adhere to this guide wherever possible. The default font must be changed to Calibri-11 pt, and may only be bolded as necessary. Background colours are unprofessional and should not be used (with the exception of events such as an invitation to a business party); however, text colours are acceptable by normal document standards (see '<u>Text Colours</u>').

Greetings

E-mail greetings are allowed to vary, however the address must be 'Dear Sir' or 'Dear Madam' if the e-mail is addressing a new potential client. For existing clients, a more casual greeting is acceptable (i.e. 'Hello Bob,' or 'Good morning,').

Signatures

The acceptable signature for all Berger Design Group employees must look like the following, in Calibri 11-pt bold:

(Name, in the form 'First Last')

Berger Design Group

Office Phone: (403) 278-2516

Cell Phone: (Your personal cell phone number in the form (000) 000-0000)

bergerdesign@shaw.ca

(Or your business e-mail if it is different)

Attachments

The only attachments that may be sent by Berger Design Group e-mail are pdf files, doc files, or jpg files for pictures. The maximum amount of attachments per e-mail is two.

Letters

Letters must never be sent as e-mail attachments; they must be printed and signed by hand before being mailed to the recipient. Take note of the <u>Letter Sample</u> page and adhere to the template. Note that all text is either left or right aligned and never fully justified; also note that all text uses the standard body text format. Your handwritten signature must be added under your name once the letter is printed.

Invoices

The format of the invoice matches the styles and fonts used for all documents. It must adhere to the Invoice Document Format; ensure you familiarize yourself with it. The total of all work, plus a 5% GST must be added together to create the grand total of what is owed. All invoices must match the format.

- 16 - 28/10/2011

Policies

Policy documents outline policies that have been created by Berger Design Group to solve problems and regulate specific tasks carried out by the company. The document format is very simple and not difficult to follow. The first part of the document outlines the specifics of the policy such as its reference number and when it comes into effect. The second part outlines what its purpose is as well as identifying any terms or phrases that relate specifically to the policy. The final part outlines the details of the policy. Study the Policy Sample for more information and for the template; however, keep in mind that many new points may be added following section three. These may vary depending on the policy.

Procedure Documents

Procedure documents are instruction guides for how to carry out specific actions or tasks. They may be used for a variety of things, but the template should be consistent. See the <u>Procedure Sample</u> for specifics, and more information regarding what to note. Do not forget to be detailed with the introduction and specific with the materials list.

Process Documents

Process documents are longer versions of procedure documents. As opposed to outlining steps that need to be taken to complete something, process documents outline steps to be taken in larger processes. For example, if you needed a document explaining how to save and print a set of building designs, you would create a procedure document. If you needed to explain how to design a specific type of house from start to finish, you would use a process document because it requires much more detail.

Take a look at the <u>Process Sample</u> and familiarize yourself with the template. Take note that most of the sections may vary with the process and sometimes some of them are not necessary. Do not include sections that repeat information already stated; only use what you need to.

Brochure Floor plans

Purpose

The purpose of brochures is to demonstrate the skills of this company to new potential customers. Because we are a sub-contracting company, we work for various builders; it is usually up to them to create the full brochure. Our job is to display a miniature of a front elevation and the main floor plan on a single page, which will be inserted into the brochure by the builder.

Style

In a blank Word document, insert either a jpg or pdf file of the front elevation of the house. It must be centered on the page with a maximum size of 10 inches tall by 13 inches wide. The floor plan for the main floor must be inserted below the elevation, with at least two inches of white space between them. This image must match the size of the front elevation perfectly.

Alternative

If accepted by the builder, the jpg or pdf files of the required documents may simply be sent by e-mail to the builder.

- 17 - 28/10/2011

Drawings and Site Plans

Purpose

Preliminary drawings are submitted to the client before any work is done on construction drawings. Once approval of the preliminary drawings has been made, and all necessary changes have been made, the completion of construction drawings may begin. Site plans are ground plans of the area surrounding the house in progress, and must include grading, geographical features, and existing buildings or other buildings under construction.

Program

Drawings and Site Plans are created in the Auto Cad program and not in Microsoft Word. As a result, typefaces and exact styles do not have to adhere to the rest of this style guide; they should simply be legible and must include the information listed in each title block as below. It is very common that documents created in Auto Cad be converted to pdf files when completed, and this must occur before drawings are sent by e-mail.

Title Block

All drawings and site plans must have a consistent title block on them. The title block format must be consistent between all documents and contain all the following content in the following order, though the exact styles may vary:

- Berger Design Group's full address
- > Berger Design Group's phone and fax numbers
- Address of project
- Designer of document
- Any revisions made
- Customer's name or business name
- Job number
- Square footage of each floor (not including basement) and total square footage of property
- Model of the property (i.e. custom)
- Scale of the drawing
- Date of drawing completion

Word Documents

General Word documents may include building specifications, price lists, architectural guidelines, and more. All documents must be created in Microsoft Word and adhere to the specifications in this style guide. Little variation should exist between documents, and the few documents that stand apart from others are invoices, process documents, policies, letters, and procedure documents. All information regarding these specific documents may be found previously in this section, and templates for each document may be found later in this style guide (see '<u>Table of Contents</u>').

- 18 - 28/10/2011

Document Control

Filing Documents

There are designated filing cabinets for all hard copy filing. A hard copy of most documents is required before the digital copy is deleted. All hard documents must be kept in storage for a minimum of seven years before they may be destroyed.

NOTE: No documents may be destroyed without the permission of Steve Berger.

Deleting Digital Documents

All documents to be deleted must first be approved to be deleted by Steve Berger unless they are old drafts of a final copy.

Saving Documents - Folder Titles

All documents must be saved in sub-folders under the main folder 'Berger Design Group'.

General Documents

General documents such as letters, invoices, and price lists should be saved in specifically named folders such as 'Invoices'. There is also a file folder for documents that do not have categories, such as a list of items. This folder is called 'General'.

Specific Documents

Builders

Folders containing documents relating to a specific builder must be referred to by the name of the builder (i.e. Calgary Best Homes).

Private Jobs

Folders containing documents relating to an independent job must be referred to by the name of the client (i.e. John Doe Residence).

Saving Documents – Document Titles

The title of the document must directly reflect the contents.

General Documents

All documents are labelled by a name and number, which varies depending on the document type. Letters are referred to by the date of the letter and the name of the recipient (i.e. John Doe, 02/05/2011). Invoices are referred to by the invoice number (i.e. BDG207). Documents such as price lists are simply named in the 'General' folder by the title of the document, such as 'Spec Home Price List'.

- 19 - 28/10/2011

Specific Documents

Builders

Documents relating to a specific builder must be referred to by job number. Each document will be placed in the file by the name of the builder; the title is the job number plus the document type. For example: '2506 Site Plan.doc'.

Private Jobs

Documents relating to a private job must be referred to by the name of the client and the type of document. For example: 'John Smith Site Plan.doc'.

Revisions

When revisions are made to a document, a new version of the document must be saved with the same name as the original, and in the same place. In the title of the document, the text 'Revision 1' in brackets must follow the original title. Any further revisions must simply follow the number pattern.

Document Release

Mailing

All mailed documents must have a Berger Design Group address label on the upper left corner of the envelope and the necessary stamps affixed to the top right before leaving the office. The address of the recipient must be either printed on a label and affixed to the front or printed out very neatly by hand. The only documents permitted to be mailed are documents that fit in a standard sized envelope; all large documents must be couriered (see below) or delivered by hand.

E-mailing

As mentioned under '<u>E-mails</u>' a maximum of two documents may accompany an e-mail. These do not require permission from Steve Berger to be sent except under special circumstances such as the release of an invitation to a business event.

Courier

Large documents such as preliminary and construction drawings must be either delivered in person or sent by courier to the recipient.

NOTE: All documents released by the company must first be approved by Steve Berger, with the exception of e-mails, monthly invoices or checks, and letters not requiring his signature.

- 20 - 28/10/2011

Design Layout Sample

Heading 1 Example 1

Heading 2 Example 1

The quick brown fox jumped over the lazy dog.

Heading 2 Example 2

The quick brown fox jumped over the lazy dog.

Heading 3

The quick brown fox jumped over the lazy dog.

Heading 4

The quick brown fox jumped over the lazy dog.

Heading 1 Example 2

My favorite types of ice cream:

- Chocolate
- Vanilla
- Strawberry

What I need to do today:

- Eat
- Sleep
- Play

Heading 1 Example 3

Heading 2 Example 3 Table

Numbers	Colours	Animals	Cities
One	Red	Cat	Calgary
Two	Blue	Dog	Edmonton
Three	Green	Mouse	Vancouver

Berger Design Group Invoice Sample

Invoice Sample

Berger Design Group

87 Aspen Cliff Close SW Calgary, AB T3H 0M1 Phone: (403) 278-2516 Fax: (403) 278-8071

Invoice Number:

Date:

GST Number: 896564325RT0001

Service provided to: (Name of builder or private residence)

Job Description	Unit Price	Total Amount
Job Number: Number of hours:	(money per hour)	(subtotal)
Job Number: Number of hours:	(money per hour)	(subtotal)
Job Number: Number of hours:	(money per hour)	(subtotal)
Job Number: Number of hours:	(money per hour)	(subtotal)
	Subtotal	
	5% GST	
	Total Amount Due	

Kindly pay amount upon receipt of invoice.

Thank you for choosing Berger Design Group.

- 22 - 28/10/2011

Letter Sample

(Name of Recipient) (Full Address of Recipient) (Today's Date)

Dear Sir or Madam:

The introduction to the letter must include a pleasant greeting and a brief overview of what the letter is regarding. This is also a good time to mention whether or not this letter is a response to one previously sent by the recipient or a follow-up from Berger Design Group.

The body of the letter must include more details about what the letter is regarding, why it is being sent, and a polite request for the recipient to take whatever action they are being requested to take by the letter.

The last paragraph must review the important points of the letter and politely request the recipient to take action when they are available to do so, followed by a pleasant closing. Each paragraph should be no longer than 6 or 7 sentences and must be as polite as possible while also being brief.

Thank you for your time, Sincerely, (Name in the form 'First Last')

Berger Design Group 87 Aspen Cliff Close SW Calgary, AB T3H 0M1 Phone: (403) 278-2516 Fax: (403) 278-8071 bergerdesign@shaw.ca (Or your personal business e-mail if it is different)

- 23 - 28/10/2011

Policy Sample

(Title of Policy)

Policy Number: (Date of policy)
(Policy number)

Revision Date: (Date when policy will next be revised) **Approval:** (Name of person who approved policy)

Signature:

(Must be signed by hand)

Purpose

This section will describe in a paragraph what the goals of this policy are and how it will reach them.

Definitions

This section will outline and define specific words or titles used in this policy including job titles, phrases, and potential jargon.

Section 1 – Scope

- 1.0 Point one regarding the scope of this policy.
- 2.0 Point two regarding the scope of this policy.

Section 2 – Consequences

- 1.0 Point one regarding consequences occurring if the guidelines outlined by this policy are not met.
- 2.0 Point one regarding consequences occurring if the guidelines outlined by this policy are not met.

Section 3 - Guidelines

- 1.0 Point one regarding the guidelines by which to adhere to this policy.
 - a) The people in charge of carrying out this policy.
 - b) Regulations regarding this policy.

- 24 - 28/10/2011

Procedure Sample

Introduction

The introduction outlines what goals are to be met by following the steps of this procedure.

Materials

This section outlines whatever materials are required to carry out this procedure.

Step 1

- **1.1** Remember to outline all details of the procedure.
- **1.2** Do not forget to be specific.

Step 2

- **2.1** Always lead the steps with a verb, such as 'Do', 'Take' or 'Move'.
- **2.2** Use very direct wording.

Step 3

- **3.1** You do not need to use sub-steps as outlined here; these are optional.
- **3.2** Not all steps have to be in complete sentences; you may use bullet points.

Step 4

- **4.1** If you choose to use bullet points, make sure you use the correct bullet points for numbered lists.
- **4.2** Warning boxes do not have to appear at the end of the document, they may appear after any step as long as they are direct and relevant.

WARNING: This warning box outlines what to be aware of. It may also be a help box, in which case it will outline where to go for assistance.

- 25 - 28/10/2011

Process Sample

Introduction

This section outlines how this process will reach its outcome. Give a general overview of the steps.

Materials/Personnel

This section outlines what materials will potentially be needed for this process or who will be required to assist you or be involved. This section is not required for every process.

How to Begin

You need a section outlining how to begin the process.

Where to Go

You need a section explaining where to go to get the materials you need or how to obtain them.

Who to Ask

You need a section explaining who is involved and where to find them.

The Process

You need a section explaining the details of the process and how to carry it out.

How to Complete

You need a section explaining how to complete the process.

What to Do if This or That Happens

You need a section explaining what to do if a problem ensues or how to avoid a problem.

Overview

If desired, you may have a flow chart or list of an overview of the process.

WARNING: Warning or help boxes required for this process may be inserted where necessary.

- 26 - 28/10/2011

Index

В

Background, - 7 -, -8 -

Berger Design Group, - 2 -, - 3 -, - 5 -, - 7 -, - 11 -, - 15 -, - 16 -, - 17 -, - 18 -, - 19 -, - 20 -, - 22 -, - 23 -

Bold, - 5 -, - 8 -, - 9 -, - 16 -

Border, - 9 -, - 10 -

Brochure, - 7 -, - 17 -

Bullet, -9-, -11-, -25-

С

Colours, - 7 -, - 8 -, - 16 -

Ε

E-mail, - 11 -, - 16 -, - 17 -, - 20 -

F

Font, -5 -, -9 -, -16 -

G

Graphic, -6-, -7-, -8-

Graphics, -6-, -7-, -8-

Н

Headers and footers, - 7 -

Headings, - 5 -

ı

Invoice, - 16 -, - 20 -, - 22 -

Italics, - 6 -

L

Letters, -4-, -7-, -16-, -20-

M

Margin, - 7 -, -8 -

Ν

Number, - 7 -, - 10 -, - 12 -, - 13 -, - 15 -, - 16 -, - 18 -, - 20 -, - 24 -

Ρ

Page number, - 7 -

Policy, -4-, -17-, -24-

Procedure, - 4 -, - 10 -, - 17 -, - 18 -, - 25 -

Process, - 10 -, - 17 -, - 18 -, - 26 -

S

Site plans, - 18 -

Style, - 2 -, - 7 -, - 17 -

Т

Tables, - 5 -, - 8 -, - 9 -

Template, - 16 -, - 17 -

Title, - 18 -, - 24 -

U

Underlines, - 6 -