

## Work Product, File Organization, and Efficiency Standards

### Purpose

This document provides standards that Business Affairs employees should follow when preparing work products that will be shared with senior leadership or the general public. Templates and resources for common work products are available for download on the [Business Affairs Employee Resources webpage](#). These resources may also be used for daily assignments and work.

These standards and templates do not contemplate every need. They can and should be modified to meet the requirements of specific documents or communications. As new requirements are defined, existing templates will be modified and new templates will be added.

### Outcomes

Standards and templates facilitate achieving the following outcomes:

1. **Promotes professionalism and brand integrity:** Templates give documents a professional design and structure and promote a consistent 'brand' for the division..
2. **Is accessible:** Templates are consistent with accessibility standards, as defined by the UNLV Office of Accessibility Resources.
3. **Promotes consistency:** Common fields and information are presented in the same manner, and generally in the same location, in documents. When similar work products are prepared using similar layouts, users can more easily read and adapt to new documents.
4. **Reduces effort:** Having templates eliminates the need to 'reinvent the wheel' when creating new work products and reduces duplication of effort.
5. **Provides guidelines for content:** While not all fields and information presented in a template are always required, templates identify a common structure and frequently required fields. The user can delete unnecessary fields and add fields as needed.

### Work Products

Almost everything we produce qualifies as a work product. Examples include:

- Reports
- Briefing papers
- Memos
- Emails
- Presentations
- Meeting agendas

- Workpapers and supporting materials
- Project charters
- Verbal communication / customer service scripts

### Work Product Expectations

Every work product generated by Business Affairs employees should be:

- **Accessible:** individuals with disabilities should be able to independently acquire the same information, engage in the same interactions, and enjoy the same services within the same time frame as individuals without disabilities, with substantially equivalent ease of use; accessibility is proactive
- **Accurate:** information and data should be accurate and identify and reference sources, as appropriate; anyone should be able to confirm or recreate the same data or information
- **Effective:** responsive to the assignment or request
- **Concise:** conveys the necessary information in an efficient manner that can be easily understood by the recipient and does not provide excess information
- **Timely:** delivered within the expected timeframe
- **Professional:** formatted professionally and consistent with standards appropriate to the work product

### Accessibility

UNLV is required to follow federal accessibility guidelines for institutions of higher education. Making documents accessible means taking proactive actions during document creation. We are all responsible for incorporating accessibility practices into our daily routine. [The Office of Accessibility Resources](#) offers training and resources to promote a culture of universal access. See below for things you can do to make your documents accessible. Please note this is not an exhaustive list:

1. Use the preset headings and subheadings in Microsoft Word and Google Docs. Document readers identify headings that are formatted in this way. The navigation pane in Microsoft Word recognizes preset headings and allows you to easily see the document layout and / or jump to a page or heading without scrolling.
2. Use bulleted and numbered lists. Similar to headings, document readers only identify lists created through this functionality.
3. Provide textual description for all pictures.
4. Use contrasting colors. Here are links to some color contrast checkers. Please note that documents need to pass the WCAG AA standard:
  - a. <https://webaim.org/resources/contrastchecker/>
  - b. <https://developer.paciellogroup.com/resources/contrastanalyser/>

Google, Adobe, and Microsoft include accessibility checkers in their software. Use these resources to identify and address accessibility concerns within your documents. This should be your final step before completing a document.

- Google: All UNLV email accounts include a subscription to [Grackle Suite](#), an accessibility checker for Google Docs, Sheets, and Slides. Use this tool to identify accessibility issues within your documents.
- Adobe: All PDFs uploaded to a public UNLV website must be [accessible](#) to index on search engines and comply with university policy. You may use [Adobe Acrobat](#) or Grackle Suite to make a PDF accessible.
- Microsoft: All Microsoft products include [accessibility checkers](#).

Training videos that provide an overview of accessibility and how to create accessible documents in Microsoft Word, Excel, Google Docs, and Adobe PDF are available in the [BA Custom Summer 2021 shared drive](#).

### Standards and Templates

These templates are designed for users to modify to fit their needs without manually recreating the format in a new document.

To use these templates, download them as a Word Document and modify to fit your needs. Please upload your final work product into ***your personal or shared*** Google Drive.

### Visual Integrity

Business Affairs templates and standards align with the guidelines established by UNLV's Integrated Marketing and Branding division. The [Visual Identity website](#) is a great resource for [editorial guidelines](#), to download [official logos and marks](#), and to learn about UNLV's [official colors](#) and [typography](#).

Use official Business Affairs letterhead, logos, and templates:

- [Logos \(update with web link\)](#)
- [Letterhead \(update with web link\)](#)

## Document Style

### Header

Headers should include:

- “UNLV Business Affairs” in the right-hand corner and / or the correct Business Affairs logo in the left corner (i.e., for a client-facing document or a formal report). (You will need to add the BA logo if you are not using official BA letterhead or template).
- A working title of the document
- Draft status (e.g., in process, final draft, revised final draft)
  - Draft status should *not* be communicated in a watermark
- If the document includes sensitive information, place the word “CONFIDENTIAL” in the header (using bold font and color for emphasis) and include a confidentiality statement in italics immediately after the working title:
  - “This is a confidential document for use only by authorized personnel within UNLV Business Affairs for internal purposes. This report should not be distributed without permission.”
  - It is recommended that a confidential document include a password for protection. A password can be added to a Word document in the “Review” tab under the “Protect” icon
  - Watermarks cannot be accessed by screen reader users. If they are deployed in a document, you must also include a text statement to indicate confidentiality.

### Footer

Footers should include:

- The department or individual’s name who drafted the document
  - Example: Prepared by: Business Affairs Employee Name
- The date the document was last revised (**be sure to keep this up to date**)
- A hyperlink to the Google Drive where the document is saved
  - Add the hyperlink by selecting “Document Info” in the *Design* menu while in the footer
- Page number

### Font

The default font settings in Microsoft Word are appropriate for most documents:

- Body text – Calibri (Body), Arial, or another Sans Serif font, 11 or 12 point
- Always use automatic headings: Using automatic headings promotes accessibility. Headings should be scarlet to align with university standards.
  - Heading style: Calibri (Light), 16 pt. font, scarlet

- To change the default from blue, right click on “Heading 1,” select “Modify,” and adjust the style, size, and color of the font
- Sub-heading style: Calibri (Light), 13 pt. font, Red
  - In order to change the default from blue, right click on “Heading 2,” select “Modify, and adjust the style, size, and color of the font

## Margins

The default “normal” margin settings in Microsoft Word are appropriate for most documents:

- Top and bottom, 1”
- Left and right, 1”

## Presentations

All PowerPoint presentations should be produced on the official [UNLV PowerPoint template](#).

Here are some best practices for creating PowerPoint presentations:

- Include an overview slide at the beginning to outline the main points
- Use large (28 or 30 point) Sans Serif font (Arial, Calibri, Roboto, etc.)
- Use consistent font and font sizes for headings and text throughout the presentation
- Only use one photo or chart per slide
- Highlight key points as opposed to including large blocks of text
  - Avoid complete sentences, dense paragraphs, or complicated punctuation
  - Move text-heavy content to handouts
- Use balanced design principles
  - Avoid too much empty space on a slide

## File Storage Conventions

All documents should be stored in a Google Drive and shared with all individuals or departments who may need access to them. Avoid saving documents to X drives as they are not widely accessible. As a general guideline, documents should only be saved in one location for streamlined retrieval and updates. Always share important files and shared drives with **at least one** other colleague who can access its contents in your absence. Check security settings to ensure that each individual is granted with the appropriate access. Google Drive offers five access levels:

- Viewer – can view files
- Commenter – can make comments and suggestions
- Contributor – can add and edit files
- Content manager – can add, edit, delete, and move files
- Manager – can manage content, people, and settings

The search functionality is one of the main navigational elements within Google Drive. Adding a description to files and shared folders ensures that files are indexed in the search engine. To add a description:

- Click on the "view details" icon in the upper right hand of the Google Drive browser
- Select any folder or file (but do not open the file) and select "add a description" under the details tab
- Add a description and identifying keywords to make the file easier to find

### File Names

Files should be named in the manner that is most useful when performing searches to retrieve a document. Date-based file naming conventions are preferred:

- **Date-based:** When documents are most frequently retrieved by date, use the following format: **YYYY-MM-DD-BriefDescription**
  - Example: *2020-02-27-DocumentTemplate*

If date-based file naming is not efficient for a department, see other suggested file naming conventions below:

- **Name-based:** When documents are most frequently retrieved by name, use the following format: **BriefDescription-LastName-Date**
  - *Document Standards - Smith - 2020-02-27*
- **Reference-based:** When documents are most frequently retrieved by a reference number, use the following format: **Reference #-BriefDescription**
  - *B296179 - Graduate College Worktag*

The title of a document should be short (no more than 20 characters if possible) and clearly convey the purpose of a document.

### Collaborating with Google products

Google products are excellent tools for collaborating with colleagues, but do have limited formatting capabilities compared with Microsoft products. Google products include Docs (similar to Microsoft Word), Sheets (similar to Excel), Slides (similar to PowerPoint).

If a project requires input from various team members, collect content and execute the first round of edits using Google products then move the content to a corresponding Microsoft program to create a final product. Here are some guidelines for utilizing Google tools:

- When inviting others to collaborate on a document, be sure to grant them the appropriate access. There are three access levels for all Google products: "Editing," "Suggesting," and "Viewing."

- If you do **not** want others to be able to edit the document, grant them “viewer” access only
- If you want others to edit and add comments directly into the document, grant “editor” access
- If you want others to add comments but not edit the document directly, grant them “commenter” access
- When a document requires input from multiple parties, it is strongly recommended that individuals make their changes as “suggestions” so others are aware of what changes are being made. This is similar to “Track Changes” in Microsoft Word.
  - To make changes as suggestions, click on the drop-down menu on the upper-right side of the document to change the mode from editing or viewing to suggesting
  - If somebody does not use “suggestion” mode when making changes to a document, users can see the version history of a Google Doc by clicking on the “Last edit...” link on the toolbar
- You may use the chat functionality to discuss changes, suggestions, and edits in order to collaborate in real time within a Google Doc. To access the chat, click on the chat icon on the upper-right hand of the document

### Ongoing Updates, Support & Maintenance

The Business Affairs communications team maintains this document and the templates in the Business Affairs Shared Resources folder. Information and updates about these shared resources will be communicated through direct emails to all Business Affairs employees.

The communications team will work directly with departments to identify and create additional resources including verbal scripts tailored to meet their specific needs. Please contact the communications team with questions, suggestions, recommendations for modifications, or requests to add new standards and templates.

### Communication Team Contacts:

- Heather Ortiz – [heather.ortiz@unlv.edu](mailto:heather.ortiz@unlv.edu)
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