BSBITU211
Produce digital text documents

Release 1

Learner guide

aspire *learning resources*

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Aspire Version 1.1

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Contents

Before you begin

This learner guide is based on the unit of competency *BSBITU211 Produce digital text documents*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: www.training.gov.au.

How to work through this learner guide

This learner guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the learner guide you need to read, and which practice tasks and learning checkpoints you need to complete. The features of this learner guide are detailed in the following table.

Icon	Feature of the learner guide	How you can use each feature
	Learning content	Read each topic in this learner guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
	Examples	These highlight learning points and provide realistic examples of workplace situations.
	Practice tasks	Practice tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
	Video clips	Where QR codes appear, you can use a smartphone or other device to access video clips relating to the content. For information about how to download a QR reader app or accessing video on your device, please visit our website: www.aspirelr.com.au/help
	Summaries	Key learning points are provided at the end of each topic.
	Learning checkpoints	There is a learning checkpoint at the end of each topic. Your trainer will tell you which learning checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.

Foundation skills

As you complete learning using this guide, you will be developing the foundation skills relevant for this unit. Foundation skills are the language, literacy and numeracy (LLN) skills and the employability skills required for participation in modern workplaces and contemporary life.

The following table outlines specific foundation skills noted for your learning in this learner guide.

Foundation skill area	Foundation skill description
Reading	• Recognises textual information within organisational and task requirements to determine work requirements
Writing	• Records numerical and textual information in accordance with requirements of task
Oral communication	• Participates in a variety of spoken exchanges with relevant personnel in an effort to clarify document purpose, audience and presentation requirements
Navigate the world of work	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	• Seeks guidance from more experienced work colleagues
Get the work done	• Understands functions and features of specific digital applications and uses these to perform work tasks

Topic 1
Prepare to produce documents

Organisations require different types of word-processed documents to carry out their operations.

Before you can produce a word-processed document, you need to find out why the document needs to be created and confirm its requirements at the outset. Clarify exactly what kind of information needs to be in the document. You also need to find out who the intended audience is; for example, it may be for internal or external clients. Organisations use many types of documents, such as reports, letters and memos. Make sure you know your organisation's preferred presentation style. This may be described in a style manual so that when you create word-processed documents or templates you can refer to this and follow the organisational specifications.

This unit is designed to give you an overview of how to produce digital documents. Although there are many different systems for producing word-processed documents, this learner guide will primarily focus on Microsoft Word 2016 using the Windows operating system.

In this topic you will learn how to:

1A   Use safe and efficient work practices

1B   Identify the purpose, audience and presentation requirements for a document

1C   Identify requirements and the best application for the task

1A | Use safe and efficient work practices

Workplace safety is everyone's responsibility.

Both employers and employees must make an active contribution to ensuring their workplace is safe. Hazards need to be identified and risks assessed to reduce the risk of injury in the workplace. If you are working at a computer for an extended period of time each day, your workstation must be comfortable and designed to help you carry out your tasks efficiently. You will need to organise your work so that you are not doing a repetitive task for a long time. You should also take regular breaks to stand up and stretch.

Another consideration is to use resource conservation techniques to prevent wastage. Most organisations require staff to follow resource-saving procedures such as turning off lights in unused rooms and recycling paper. You need to be aware of any conservation efforts made by your organisation.

Workplace safety legislative requirements

You must work in line with legislative requirements, regulations, Australian and industry standards, and the relevant codes of practice.

All health and safety legislation requires employers to provide a safe workplace and adequate training and supervision, while controlling workplace hazards and risks.

> **Health and safety legislation outlines legal requirements such as:**
>
> - managing risks to health and safety
> - promoting and maintaining the health, safety and welfare of people at work
> - protecting people at work from injury and illness, including psychological injury
> - protecting the health and safety of the public in workplaces
> - consulting workers and encouraging them to maintain health and safety
> - providing rehabilitation and maximum recovery for injured workers.

Health and safety policies and procedures

Health and safety policies and procedures are documents that ensure all employees work safely and effectively.

All workplaces in Australia are required to have a policy in place that describes the organisation's and employees' responsibility for maintaining health and safety. The policy should include the organisation's goals and objectives regarding health and safety, and can help you fulfil your duty of care as an employee.

The following information relates to working in an office and using a computer workstation, and should be contained in an organisation's health and safety procedures.

> **Health and safety procedures outline:**
>
> - workstation ergonomics
> - standard safety precautions and housekeeping
> - safe handling of hazardous substances, e.g. cleaning products or printer inks
> - emergency and fire drills
> - hazard identification and risk control
> - manual handling, e.g. lifting, reaching and repetitive work tasks
> - emergency contact numbers, including local doctors and hospitals
> - location of first-aid equipment
> - details of first-aid officers.

Control risks associated with hazardous manual tasks

It is a legal requirement for the PCBU and workers to address the risks associated with hazardous manual tasks in the workplace.

The WHS Regulations and the Code of Practice for Hazardous Manual Tasks outline specific requirements for hazardous manual tasks that must be addressed.

A person conducting a business or undertaking (PCBU) must manage risks to health and safety associated with undertaking a hazardous manual task, including risks of developing a musculoskeletal disorder (MSD).

The Hazardous Manual Tasks Code of Practice helps PCBUs and workers to:

- identify hazardous manual tasks
- assess the risks
- control the risks
- review the control measures.

A PCBU must consult with workers, so far as it is reasonably practical, to develop their own set of procedures to manage the risk of MSDs.

> **To determine which control measures to implement, the PCBU must consider the following:**
>
> - postures, movements, forces and vibration relating to the hazardous manual task
> - the duration and frequency of the hazardous manual task
> - work conditions that may affect the hazardous manual task or the worker performing it
> - the design of the work area and layout of the workplace
> - the systems of work used
> - the nature, size, weight or number of people or things involved in carrying out the hazardous manual task.

Musculoskeletal disorders

The repetitive movements and sustained body position associated with entering data into a computer is regarded as a hazardous manual task and puts the operator at risk of developing an MSD.

MSDs come about in two main ways:

- gradual wear and tear to joints, ligaments, muscles and inter-vertebral discs through repeated or continuous use of the same body parts, including static body positions
- sudden damage caused by strenuous activity or unexpected movements, such as when loads being handled move or change position suddenly.

MSDs may include conditions such as:

- sprains and strains of muscles, ligaments and tendons
- back injuries, including damage to the muscles, tendons, ligaments, spinal discs, nerves, joints and bones
- joint and bone injuries or degeneration, including injuries to the shoulder, elbow, wrist, hip, knee, ankle, hands and feet
- nerve injuries or compression, e.g. carpal tunnel syndrome
- muscular and vascular disorders as a result of hand–arm vibration
- soft tissue hernias
- chronic pain.

Standard precautions

Your organisation may require you to use standard precautions, particularly work practices related to the prevention of repetitive strain injuries (RSIs).

These include ergonomic practices, workstation design, enforced breaks and regular exercise routines, such as stretching, rolling the shoulders and shaking arms.

Workers in an office are expected to follow standard precautions when using a workstation, particularly at a sit-down desk. Research on sitting has demonstrated that other precautions also need to be considered to help prevent injuries, such using standing workstations and alternating the mouse from one side to the other. It is important that you carefully follow any standard precautions that are prescribed for your workplace.

Equipment and systems safety checks

An important part of your daily work routine is to check the various systems and equipment you use during the day to make sure they are in good working order.

Your organisational policies and procedures should include steps to follow. You may need to perform this procedure at the start of your work day or at specified intervals throughout the day.

Ergonomics

The aim of ergonomics is to reduce the risk of accidents, injury and illness by applying safe work practices.

Ergonomics is about creating comfortable working conditions by adapting workstations, tools and equipment to an individual worker's needs. It also improves performance and productivity in the workplace. Ergonomics covers all aspects of working, from physical stresses such as sitting at a workstation all day to environmental factors such as noise, air conditioning and lighting.

When your posture is poor, you may suffer from aches and pains. Spending a long time in the same position can put stress on your body and this can be made worse if you are in an uncomfortable or poorly supported position. These symptoms may be very slight at first, but if you continue to have poor posture your symptoms may get worse and become intolerable. It may result in cumulative stress given the constant strain on your muscles, nerves or tendons.

When setting up your workstation, make sure your posture will not cause you pain or discomfort. The equipment you use needs to be adjusted to suit your body shape and size, and the tasks you are doing.

Ergonomic workstation design

How your workstation is designed can affect your health and wellbeing.

Several physical problems can result from poor workstation design; for example, lower back strain may result from sitting in a chair that does not support your back. Some features of the workstation may vary depending on the type of computer work being performed.

Below are some guidelines for setting up an ergonomic workstation.

Chair

Adjust the seat height to suit your furniture and equipment. Ensure that your feet are flat on the floor, your thighs are horizontal and your lower legs are vertical. If possible, use a chair with a five-castor base.

Adjust the backrest by raising it to the maximum height and then lowering it until it fits the curve of your lower back. If this is not comfortable, lower it another couple of centimetres. Continue this until it reaches a comfortable position.

The backrest should support your lower back, and may also be adjusted backwards and forwards. When seated in your usual working position, move the backrest until it has a gentle pressure on your lower back. Make sure there is at least two centimetres of space between the front of the seat and the back of your knees. Armrests should be positioned so that they do not interfere with carrying out your work tasks.

Desk

Keep your head erect when seated at your desk, and ensure that the surface of the desk is just below elbow height.

If your desk is not height-adjustable, try to raise your chair so you are sitting at the correct height, and use a footrest, if necessary, to make up the difference. Ensure there is clearance between the lower edge of the desk and your legs, and between the front edge of your seat and your desk.

If your desk is too low, you may be able to extend the legs. You should have plenty of leg space underneath your desk. Don't clutter the space with bags and bins, as your legs may become cramped and your posture may become twisted.

Position any equipment or materials you use so that you can reach them easily without twisting. For example, place frequently used stationery in the top desk drawer, and ensure your keyboard and monitor sit directly in front of you to avoid having to twist your body.

Keyboard

The angle of your keyboard can be adjusted to suit you by moving the supports underneath it. Place the keyboard as close as possible to the front of your desk. Have your upper arms hanging freely. Your forearms should be approximately horizontal.

While typing it is best not to rest your wrists, as they should not be bent up, down or to the side. The knuckle, wrist and top of the forearm should form a straight line. Wrist supports give you a place to rest your hands only when pausing from typing, not while you are typing. Do not pound the keys; instead, use a light touch. Leave enough room on your desk to put the keyboard out of the way when you are not using it.

Don't place documents between yourself and the keyboard, as stretching will eventually cause muscle strain in your arms, shoulders and neck.

Mouse

Place the mouse and mouse pad directly beside your keyboard on the side you prefer. If you use the mouse frequently, you could try to alternate sides. You will be surprised at how easy this becomes with practice. Your wrist should be straight and the desk should support the weight of your wrist, not your arm. Try to keep your wrist flat and rest your fingers on the mouse between clicks. Hold the mouse lightly. Don't hold onto the mouse when you are not using it.

Monitor

Once you have adjusted your chair and desk, you can position your monitor. Adjust it so that the top of the monitor is level with or slightly lower than your eyes. If you can't adjust the monitor to the correct height, place it on a platform.

The viewing distance should be between 40cm and 70cm. The screen angle should be adjustable between 85 and 125 degrees. It is best to position the screen so that you can clearly read the text without having to lean forward, twist your neck or look upwards. A relaxed viewing angle is approximately 35 degrees. Place a document holder beneath or beside the monitor at the same viewing distance as the screen.

Also take surrounding factors into consideration, such as reflection, glare and shadow, when positioning your screen. You may need to use an anti-glare filter.

Desktop layout

Items on your desk, including equipment and resources, should be arranged so they are within easy reach.

Your desk area can be divided into three zones:

- the optimum reach zone – the area closest to you, where your hands operate most of the time
- the maximum reach zone – items are further away, but still close enough to reach comfortably
- the outer reach zone – where you may have to bend forward or stand to reach items.

Make sure your desk is organised so that frequently used objects, such as your keyboard, are close to you. Objects that are used less frequently, such as your phone, should be out of the way but still within easy reach. Other resources that are rarely used, such as in- and out-trays, should be in the outer reach zone.

The following outlines some devices that can help you maintain a good posture at your workstation.

Document holders are designed to hold papers and reference material in a convenient position for viewing. Place your document holder in the correct position. If it is below the screen or too far off to the side, each time your eyes look from one source to the other, your pupils have to adjust. Doing this for long periods of time can cause headaches and eyestrain. Place the document holder at a similar level, angle and distance as the screen to avoid having to shift your eye focus.

Document holders

Angle boards allow the user to maintain the correct posture when reading by reducing the angle between the work surface and the user. These supports can be adjusted to a suitable height and angle, and enable comfortable reading with the neck correctly positioned. Try to keep your neck as straight as possible when you are reading.

Angle boards

If you use a telephone for long periods of time, it is a good idea to use a headset. A headset will keep your neck straight and your arms free. Headsets prevent you from bending your neck to support the telephone handpiece.

Headsets

A footrest may be necessary if you can't place your feet comfortably on the floor. Footrests allow your feet to rest at the correct height and on a tilting angle, which prevents strain on the lower back.

Footrests

Setting up a home office

Communication technology and organisational policies to maintain a sustainable work–life balance have created opportunities for more flexible working arrangements.

This means that more employees are working from home offices or in other remote office locations. Many benefits can be derived from flexible working arrangements for employers and employees, but there is still a responsibility for all parties to make sure that home and remote offices use ergonomic practices and follow health and safety requirements.

Hot desking

Hot desking refers to a system where workstations are not assigned to an individual worker, but may be used by multiple workers during different periods of time.

The motivation behind hot desking is primarily the cost savings achieved by setting up fewer workstations in workplaces where not all the workers are in the office at the same time.

Another common adaptation of hot desking is where workstations are assigned to individual workers, but need to be readily available for other workers to access based on daily work requirements, such as a group of people coming together to work on a specific project.

Considerations with hot desking:
• It is common for workers to want their own space. Consequently, they may choose one location and stick to it.
• It can take extra time each day to set up a workstation for each individual to maintain good ergonomics and work efficiency.
• Personal hygiene needs to be maintained to prevent the spread of germs on items such as keyboards and mouses.
• Workstations need to be tidied appropriately in readiness for the next user.

The benefits of standing desks

Sitting at a desk for long periods of time has many negative health effects.

These can be overcome by using standing desks. Standing provides a greater opportunity for your body to move and adjust, and involves more muscular activity than sitting.

Some studies have shown that the negative effects of prolonged sitting cannot be counteracted by regular exercise. The only way to eliminate the problem is to avoid sitting as much as possible.

Some of the health benefits of standing include:
- alleviating back pain and other repetitive strain injuries by greater use of core back muscles to support the upper body
- increasing focus, alertness and activity level by releasing restless energy
- reducing the risk of developing cardiovascular disease, diabetes and blood clots, which can be caused by prolonged sitting.

It is recommended that you start using a standing desk gradually by alternating between sitting and standing. Using a standing desk for hours on end requires your body to adapt. You may experience sore feet, tired legs and fatigue at first. Wear comfortable shoes and use an anti-fatigue floor mat to help counteract this.

Ensure you have an ergonomically designed standing desk so that you maintain correct posture while working.

Standing desk recommendations
• Position arms at 90 degrees when standing. • Place the computer screen at eye level and tilt it slightly upwards. • Place the computer monitor at least arm's length away. • Keep your back straight and avoid leaning on the desk.

Monitor and adjust lighting

Good lighting is essential for a safe and hazard-free workplace.

You need to see things clearly in order to work effectively. Simply shifting the screen angle, adjusting blinds, altering the brightness settings on the screen and using desk lamps can reduce risks associated with poor lighting. Try to use natural sunlight rather than artificial lights if possible. If not, keep bulbs and fixtures clean, focus light on your task and use fluorescent lights to minimise eye strain and headaches.

The following are hazards associated with poor lighting:
• Glare – A computer screen positioned in front of a bright window can be difficult to see. • Flickering lights – A fluorescent light may malfunction, causing annoyance, irritation and even nausea. • Inadequate lighting – Reading in dim light can cause eyestrain. • Shadows – Shadows shifting across your work area can cause you to sit with bad posture in order to view your work.

Manage noise in the workplace

Noise can include any ongoing, loud or disturbing sound.

Excessive noise around machinery or equipment can cause permanent hearing loss. Noise is a problem if it disturbs or distracts employees, causes stress or interferes with communication or work.

Many offices are open-plan, often with employees seated close to each other and divided by partitions at chest or head height. Think about noise levels when you set up your workstation. It should be possible for people in open-plan offices to have some privacy when they are on the phone and carrying out their day-to-day tasks.

Noise in the office can come from:

- machines and equipment, such as photocopiers, scanners, paper shredders, phones and printers
- outside traffic and roadworks
- people talking to each other or on the phone.

Noise can also be a problem in other workplaces, such as on factory floors and at construction sites. You may have to wear ear protection if you are required to work in an excessively noisy environment.

There are many ways that noise can be controlled in the workplace. Examples include:

- Noisy machines can be put in a separate room or area.
- Sound-absorbent materials such as carpet and partitions can be installed or arranged to deflect and absorb noise.
- The volume level on your speakers can be adjusted.

Remember that noise is only a hazard when it is stopping you from working productively, comfortably or safely. Many people prefer to work with low levels of noise rather than complete silence.

Monitor and adjust air conditioners

Air-conditioning systems may cause hazards due to poor-quality air or inadequate temperatures.

Air-conditioned offices do not have fresh air from open windows. This can cause problems for some people. The air quality may need to be adjusted by allowing more fresh air inside or by improved ventilation systems.

Additionally, office workers frequently complain of being too hot or too cold. If a person's desk is near an air-conditioning outlet, the area around their desk can be much colder than elsewhere in the office. They can also suffer from dry and itchy eyes. Report such hazards to the relevant person. This situation can usually be corrected by adjusting air-conditioning flow.

Vary your activities

Make sure you plan your daily tasks so that you aren't doing repetitive work for long periods of time.

Having a well-planned workstation and comfortable surroundings is pointless if you don't organise your work in a way that prevents discomfort or pain.

Your work role may involve several different tasks. Some tasks may be repetitive, such as typing up reports or entering data. If you are able to vary the tasks you carry out each day, this will help to prevent repetitive actions that cause stress to your body. For example, if you have to enter a lot of data, break up the repetitive nature of the task by discussing a project with a colleague, doing some research online or doing another work task.

You should also take regular breaks. Employers are required to allow employees to take rest periods throughout the day, including tea and lunch breaks, to reduce stress and fatigue.

Take exercise breaks

Using computers for too long without breaks has been associated with back and neck pain, headaches, migraines and eyestrain.

Try the following exercises several times a day, and encourage your colleagues to try them too. Make sure you are relaxed and stretch gently, without overstretching. Stop if you feel any pain or discomfort, and remember to exercise both sides of your body. Most importantly, breathe deeply and evenly throughout the stretch.

- **Neck:** Turn your head gently to look over your right shoulder. Hold for 10 seconds. Now roll your head forward to look over your left shoulder and hold for 10 seconds. Repeat several times.

- **Shoulders:** Sitting with a straight back and neck, roll your shoulders forward, then back. Repeat several times.

- **Wrists, hands and arms:** Interlacing fingers, turn your palms upwards. Now lift your arms over your head and stretch, leaning gently to the left and then to the right. Repeat movement several times.

- **Upper and lower back:** In a standing position, place your hands in the small of your back. Gently arch your back and hold for 10 seconds. Repeat when needed.

- **Shoulders and arms:** Stretch your arms above your head, cradle your elbow with your hand and gently pull your elbow behind your head. Repeat on the other side, holding the stretch for 10 seconds.

- **Eyes:** Every 20 minutes, look away from the screen. Focus on a distant object (more than three metres away).

Watch a video demonstration of the above exercises here.

Practise conservation techniques

Conserving resources at work not only benefits the organisation by reducing costs, but also the planet by reducing greenhouse gases and the amount of waste sent to landfill.

Most organisations have policies and procedures for conserving resources. You can find out what these are by reading your workplace manual, or by asking your manager or colleagues. The following outlines ways to conserve resources at work.

Minimise paper wastage

Policies for reducing paper wastage include:

- using both sides of the paper when printing and photocopying
- recycling non-confidential waste paper
- reducing the volume of printing where possible
- reusing paper by using blank sides for rough drafts
- using recycled paper or paper from plantation timber for printed documents.

Reduce energy use

Policies and procedures for saving energy include:

- training programs on smart energy practices to practise energy efficiency
- turning off lights and equipment when not in use
- keeping air conditioners at 18–20°C in winter and 24–27°C in summer
- using power-saving functions on devices such as computers and tablets.

Practice task 1

Question 1

Here is a checklist to follow when setting up your workstation. Go through the points that are relevant to you and make any necessary adjustments to your work area. You may need another person to help you and check your posture. If you are not able to tick some of the checkpoints, discuss making alterations to your workstation with your manager.

Chair

❑ Is the seat height-adjustable?

❑ Is it high enough to allow you to sit comfortably at the keyboard?

❑ Is it stable?

❑ Does it swivel?

❑ Is the height of the backrest adjustable and does it tilt backwards and forwards?

❑ If it has arms, can you still get close enough to the desk and swivel the chair?

❑ Are your feet flat on the floor or are you using a footrest?

❑ Are you sitting up straight with the backrest firm against your back?

Desk

❑ Is it large enough to allow the screen and keyboard to be correctly positioned?

❑ Is it low enough to allow you to keep your forearms horizontal or sloping downwards?

❑ Is it high enough to allow your thighs to fit comfortably underneath?

Keyboard

❑ Can it be tilted to allow you to adjust it?

❑ Are the symbols on the keys clear and easy to see?

❑ Is there sufficient space in front of it to allow you to correctly position your arms?

Monitor

❑ Does the monitor have easily adjustable brightness and contrast controls

❑ Is the image on the monitor stable and flicker-free?

❑ Are there adjustment mechanisms to allow the monitor to be tilted, swivelled or raised to avoid glare and reflections, and help you keep a natural and relaxed posture?

❑ Are you sitting far away enough from it for comfort?

Question 2

Give **two** examples of health and safety requirements you should follow before starting work at your computer desk.

Question 3

Give **two** examples of a health and safety requirement you should follow when producing a large document that you know will take many hours of keyboarding to complete.

1B | Identify the purpose, audience and presentation requirements for a document

Word-processing a document involves using a computer and software application to create a text-based document.

For example, to word-process a letter, you can type the text into Microsoft Word and format it as a letter. Before producing a word-processed document, find out its purpose. For example, consider who it is for and how it should be presented. This information can always be obtained from your manager or supervisor.

The following information contains guidelines on what should be considered when determining a document's purpose, audience and presentation requirements. Always refer to your organisational style guide for instructions on format and final presentation.

Purpose

The purpose of a word-processed document varies. The purpose will influence the type of document you produce, such as an agenda for a meeting or information for clients about organisational news or events. Sharing information is important in all organisations and word processing is a common way to produce information for distribution.

If you are asked to produce a word-processed document, the first thing you should clarify is the purpose of the document, which will determine the way it is planned and designed. For example, if the document's purpose is to provide detailed information about the progress of a project, you may need to collect information from colleagues before putting the document together.

Audience

You need to be aware of your document's audience. When you are producing a word-processed document, keep in mind who it is intended for as the document's audience will affect how the information is presented. For example, if you are developing a document for clients who are not familiar with the subject matter, you may need to avoid using jargon so they don't become confused. Consider the information needs of the audience and how detailed the information should be.

Presentation requirements

Most organisations have developed policies and procedures for how they would like word-processed documents to be presented. How you present your document will enhance the audience's ability to understand it; for example, you may need to present numerical data in tables or charts. Before starting to produce the document, check if there is a template available. Your organisation may require you to use templates for various document types, such as presentations, memos, agendas, meeting minutes and reports.

Organisational requirements for document type and style

Most organisations have requirements for the style in which documents should be presented.

You need to be familiar with the styles used by your organisation for each document type. An organisational style guide will explain all the specifications and design details for various documents and may have developed templates that outline an established style and layout for a particular type of document.

Word-processed documents used by organisations include:	
• memos to share information	• meeting minutes
• agendas for meetings	• briefing papers
• annual reports or research reports	• letters to customers or clients
• flyers for promotion	• mail merges
• standard form letters	• envelopes with addresses
• labels for mail outs	• slides for a presentation.

Document templates

Templates provide a quick and easy way to access documents that have a standard layout and style.

Templates can be formatted to any style your organisation prefers and are used to ensure that particular types of documents are always produced in the same style.

Examples include memos, letterheads, and standardised letters to customers and staff. Templates used by organisations can be created in-house or obtained online. There is a wide range of templates available for word-processing documents, such as agendas, letters, memos, invoices and invitations. In Microsoft Word 2016, the templates are available online, which means you need to be connected to the internet to be able to use them.
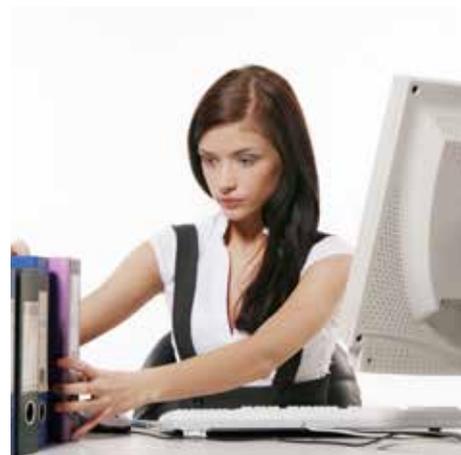
Using template designs can be useful if you are not sure how to set up particular documents, or if you want to alter the layout of existing documents. These are stored in either Sample Templates or Custom Templates.

If you have to create a template for your organisation, ask your manager for advice about organisational style requirements. If your organisation has existing templates, make sure you know where they are stored.

Meeting minutes and agendas

An agenda is a list of items to be covered in a meeting, while minutes are a written record of what occurred in the meeting.

Agendas help participants follow the proceedings. They are also used to specify the events for many other sorts of business activities, such as talks at a conference.

Word has Agenda templates that you can use to create an agenda. By selecting the **File** tab, choosing **New**, and searching for 'Agenda', you can access the online agenda templates.

Minutes are used to record a list of participants and the details of all issues discussed. They are written at the time of the meeting and are often placed on a server (a computer network) where all employees can access them. It may be your responsibility to write meeting minutes, so make sure you know where to find a template and copies of previous minutes.

You can find a template for meeting minutes by selecting the **File** tab, choosing **New**, and searching for 'Minutes'.

Example

Meeting minutes

Minutes of the monthly meeting of the Equipment Committee of Engineering Forces – Wednesday 18 April at 2pm at 237 Fraser Street, Belton

Present

G. Jones (Chair), L. Meadows, D. Juntovski, J. Crance, A. Andrews, S. Tran, H. Roberts

Apologies

J. Rostova

Minutes of the previous meeting

The minutes of the previous meeting were confirmed and adopted as an accurate record.

Correspondence

A letter was received from Century Computers for two computers and a modem.

A letter was sent to the Royale Receptions Centre requesting information on facilities.

Reports

G. Jones reported that the consultant from Eagle Consultancy had completed a report on the computer needs of the company. The findings will be summarised and distributed to all staff members.

Actions:

- H. Roberts to prepare a summary and distribute to staff within a week.
- J. Crance presented the financial report on spending for March. Major items were the coffee machine and filing cabinet. The report was accepted.
- A report from the Occupational Health and Safety Officer was tabled and discussion deferred to the next meeting.

Other business

D. Juntovski reported that the printer had consistently broken down during the previous three weeks and requested that the cost of getting a new printer be investigated. The meeting discussed the possibility of obtaining a second-hand printer.

Action: A. Andrews will obtain costs for a new printer and a second-hand printer from a range of suppliers and report at the next meeting.

Next meeting

The next meeting was set for Friday 27 April at 2pm.

Reports

A report is a document that outlines information about the activity in an organisation.

A report may be written about the progress of an existing project, the feasibility of a future project or to summarise the findings of research that has been undertaken. Writing a report is a way of communicating organisational information to a wide audience.

Reports often include many details that need to be collected from multiple people in an organisation. For example, if multiple teams are working on one project, their progress may need to be recorded in a single report. To access a variety of report templates, open Word, select the **File** tab, select **New** and search for 'Report'.

<table>
<tr><td>**Example**</td><td>

Report

Look at the following example of a report outline. Because reports are generally quite long and detailed, the report example is only an outline.

19/6/2018

Phase 1 of the Edition 5 Project

The Edition 5 Project is developing a new product to be ready for client sales in the following year.

The following Phase 1 milestones of the Edition 5 Project have been successfully reached:

- Evaluation of clients' needs has taken place.
- Collation and analysis of the results has been completed.
- A report into the evaluation findings has been released.

Actions

Phase 1 actions that need to take place include:

- development of plans for using the evaluation findings in the Edition 5 Project
- the assembly of a development team and the release of its plans in two weeks.

</td></tr>
</table>

Notices

A notice is a document that is used to give brief information to a wide audience.

The point of a notice is to attract people's attention and interest them in the notice's subject. It could include a message to the cleaners to turn off the lights before they leave or a reminder about an upcoming event or activity, such as the following example for a lunchtime seminar.

Lunchtime staff seminar

Wednesday 10 October

12pm – 1pm
Baltic Room

Hayley Kings, fitness instructor from Loosen Up Fitness Centre, will conduct a 1-hour seminar on how to stay fitter and healthier, and finding time for exercise in your busy schedule. A selection of healthy snacks will be provided.

Letters

Organisations commonly use business letters to send information to internal and external clients.

Many organisations have printed letterhead paper, and the information is word-processed before being printed on the paper. An organisation may choose to design a letter template that suits its organisational style requirements or use one available from word-processing software.

Many organisations have standard letters for different types of communication, including letters that are sent out regularly. Examples of standard letters include acknowledgement letters, overdue payment letters and customer reward letters. Standard letters can be saved as a template and accessed by selecting the **File** tab, then selecting **New** and **Custom**.

Example

Letter

Near East Trading Co
131 Victory Road
Kensington TAS 7725
Telephone: (03) 3275 9123

Ms Peta Jones
Manager
Expo Furniture
28 Hopper Street
Cairns QLD 4870

19 February 2018

Dear Peta,

We are pleased to announce that our Summer Selection is currently being finalised. A copy of the catalogue will be forwarded to you as soon as it is available.

At the beginning of March our sales representative will start showing the range to all our clients. You will be contacted personally to arrange an appointment to view the Summer Selection.

We hope you will be as impressed as we are with the new range. Please contact us if you require any further information.

Regards,

S Wilson

Sophie Wilson,
Brand Manager

Near East Trading Co

Practice task 2

Part A

Question 1

Explain why it is important that you find out information from your supervisor for each of the following before you begin a task.

a. The document's purpose

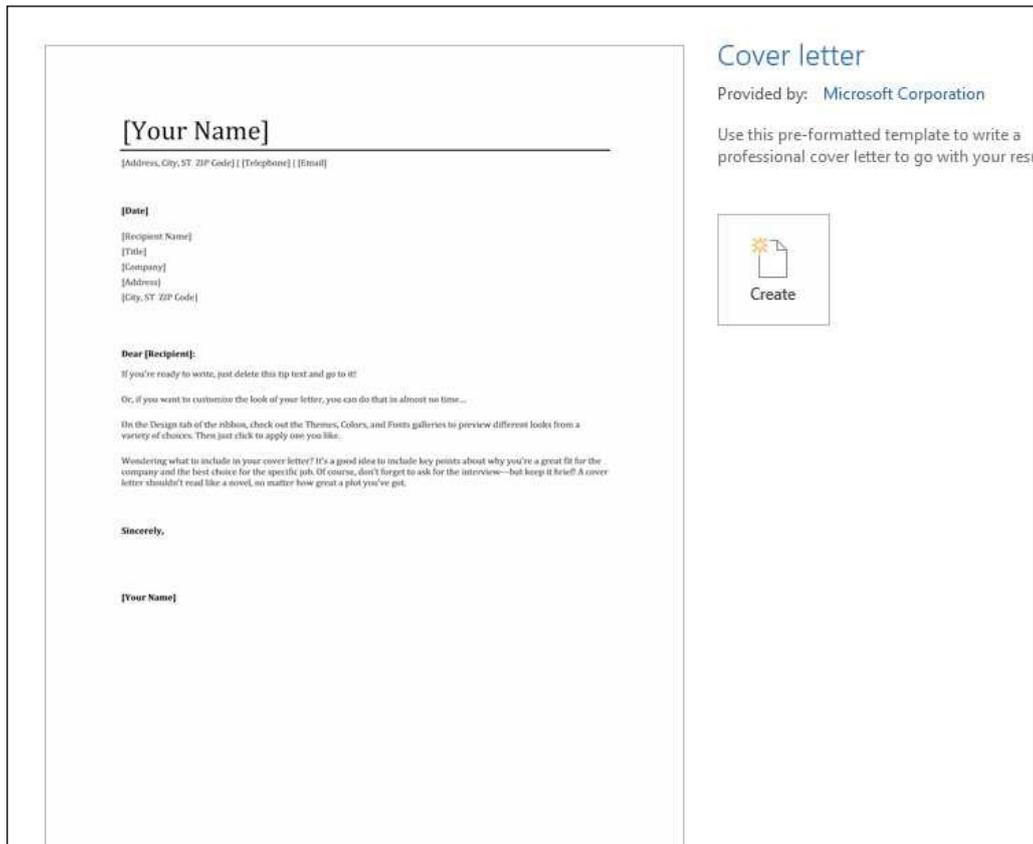b. The intended audience

c. The presentation requirements

Part B

In the following exercise, you are required to create a letter using a Word template.

1. Open Microsoft Word.
2. Select the **File** tab, then select **New**.
3. Search for 'Letter' and press **Enter**.
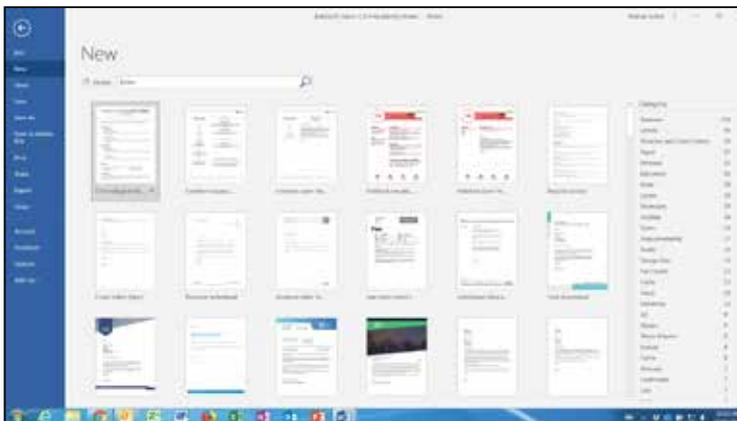
4. Choose an appropriate template from the list.
5. Select **Create**.

6. Write a letter on a subject of your choice. Save your letter as 'MyLetter'.

Mail merges

The mail merge option can be used to send the same information to a number of people.

Mail merge can be used for letters, envelopes and labels, including sales and marketing letters, evaluation of service letters and newsletters. Any information can be used as a mail merge, including name, address, postcode, customer number, amount owing and customer preferences. Data used in the mail merge can be stored via spreadsheet or database programs, or as a table in Word. It is possible to use either existing data or a list of data created as part of the mail merge process. The list of data that is created can be used again if further mail merge documents are required.

Here are some tips on mail merging.

Break details into small parts

A common error that people make when inputting the address is to record all details under Address line 1. Mail merge works with fields, which means that all details need to be broken up into smaller parts to enable you to manipulate the information as you see fit.

Be aware of how data will appear

How you insert the merge fields is how the data will appear, so if spaces or line breaks are required you will need to manually insert these into the document.

Printing merged document

When completing a mail merge document in the workplace, there may be numerous letters consisting of the same information, addressed to different people. In most cases, a merge document will be sent to print with only the merged document outline, with the associated database being stored in the computer system.

Practice task 3

In the following exercise, you are required to perform a letter mail merge and create a data source for the merge.

1. Open the letter you created in the previous exercise and delete the details of the recipient. The letter will be used as a pro forma for the merged letter that you are about to create.

2. Select the **Mailings** tab.

3. Click **Start Mail Merge** and select **Letters** from the drop-down menu**.**

4. Click on the **Select Recipients** drop-down menu.

5. Select **Type New List**. (If there is already an existing database of contact details to be used, access by selecting **Use Existing List**. Select the appropriate file, then skip to Step 9.)

6. Record required details under the relevant columns (**Title, First Name, Last Name**, etc.)

7. If additional fields are required, such as postcodes, you can rename a column. To do this, select **Customize Columns**, select the field you want to rename and click **Rename**. If entries are not required, highlight them and select **Delete**. When you have the desired fields, click **OK.**

8. To add all the fields required for addressing the letter, place the cursor where you want to insert the address block. Details to be recorded in the Address List are as follows:

Title	Mr	Ms	Ms
First Name	John	Janelle	Ha
Last Name	Smith	Groves	Duong
Company Name	Green Thumbs	Livestock Inc.	ARV Financial
Address Line 1	12 Smith St	21 Dorset St	32 Gloster Rd
Suburb	Melbourne	Sydney	Sydney
State	VIC	NSW	NSW
Postcode	3000	2000	2000

9. Click **OK**. Save the database of the list of names as 'MyList'.

10. From the **Mailings** tab, click the **Address Block** button. Specify the address block elements and click OK. Remove the existing address fields you are replacing.

11. To insert a greeting (such as 'Dear'), select the **Greeting Line** button.

12. To edit each letter individually, select **Finish & Merge**, then **Edit Individual Documents**. The letters will open in a new document for you to edit individually.

13. If you are satisfied with the final document, select the **Finish & Merge** button. Select **Print documents**.

14. Go to the **File** tab, select **Save As** and save the master letter as 'MyMerge'.

Labels and envelopes

All organisations need to have a system for entering addresses for correspondence to clients or suppliers.

An organisation may choose to enter addresses directly onto envelopes or to print out strips of labels that stick onto the envelopes. You can use word-processing software to create labels and to print addresses onto envelopes. To add an address to an envelope, you are required to use an existing letter.

If you are responsible for large mailouts in an organisation, this software function can save you a lot of time.
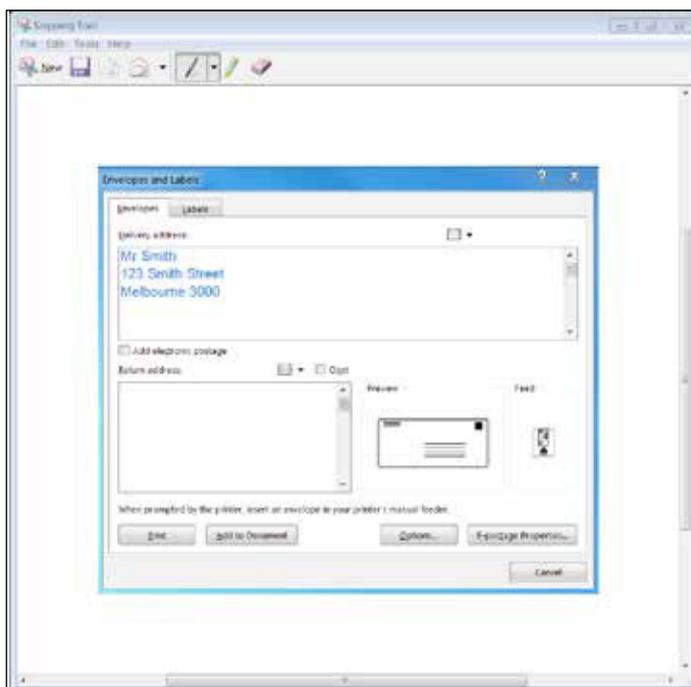
Practice task 4

In the following exercise, you will word-process an address for an envelope.

1. Open your MyLetter document.

2. From the **Mailings** tab, select **Envelopes**. The recipient's address that you typed into your letter should appear in the **Delivery address** box. Look at the following example to help you.

3. Under **Return address,** enter your organisation or home address.

4. If you want to change the size of the envelope, click **Options**. Under the **Envelope Options** tab, select the correct envelope size from the drop-down menu. Click **OK**.

5. To print your envelope, place an envelope in the printer and click **Print**. Make sure the envelope is inserted the right way. Close your MyLetter document.

Practice task 5

In the following exercise, you will create an address for a mailing label.

1. Create a new, blank Word document.

2. From the **Mailings** tab, select the **Labels** button.

3. Under **Address**, enter an address for your label. You can print a full page or a single label. For this exercise, select **Single label**.
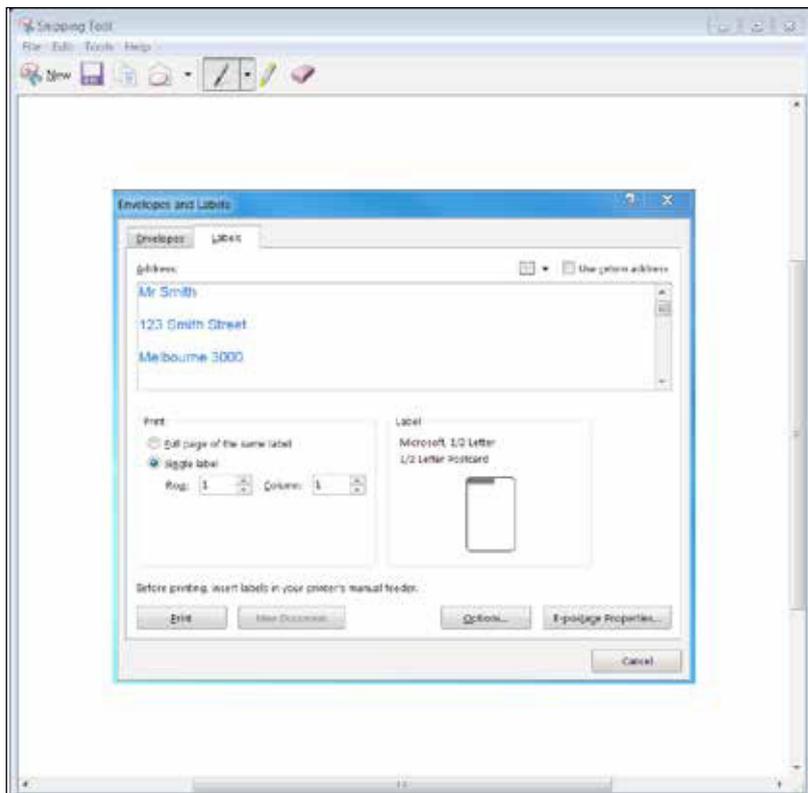
4. To select a specific label size, click **Options**. Many labels have a special size code that Word recognises. Check the labels you are using and make sure the code is in the label options. Select the appropriate label size and click **OK.**

5. To print your label, place a label sheet in the printer and click **Print**. Make sure the sheet is inserted the right way.

1C Identify requirements and the best application for the task

Consistent document layout and design helps to identify an organisation, and demonstrates its professionalism and culture to those receiving the information.

It is therefore important that care is taken in design and layout, and that it adheres to the corporate image of the organisation. This is the purpose of the organisational style guide, to ensure consistency in the presentation and final look of the documents produced right across an organisation.

Most organisations require employees to adhere to specific layouts and designs when creating documents. This may include using standard templates or using the corporate letterhead for certain types of documents.

Document layout and design may relate to:

- margin width
- font type and size
- spacing of text and paragraphs
- alignment of text
- use of headers and footers
- document reference details
- signature blocks and document sign-off
- use of company logos and slogans.

Corporate colour scheme

Some organisations require a particular colour scheme to be used when producing documents.

This may relate to the type of font and colours used, as well as the colour and type of paper used for certain correspondence. For example, some organisations use coloured paper with the corporate letterhead for the first page of outgoing correspondence and plain paper for supplementary pages.

Alternatively, some organisations have their own colour scheme and logos as a template. If so, you will need to ensure the document is printed in colour as opposed to black and white. Where possible, verify colour scheme requirements with your supervisor or colleagues. The use of a colour scheme helps to promote the corporate image of the organisation, and the scheme is usually similar colouring to that of the corporate logo.

Corporate letterheads and logos

For many documents, such as outgoing official correspondence, it is necessary to use a company letterhead or logo.

Some organisations use pre-printed letterheads, and you will need to ensure that the appropriate spacing and margins are used to allow the full letterhead to be printed. If letterheads are commonly used, your office may use a set printer tray for company letterheads.

Alternatively, some organisations use templates for documents containing letterheads or logos. These will be available to you as new documents. Select the **File** tab, choose **New**, and search for 'Letterheads'.

There may be set guidelines when using corporate logos. For example, you may need to adhere to set procedures for the size, colour and positioning of logos, and when they should be used. You may need to obtain permission to use the company logo, particularly in larger organisations. This is because a logo is part of an organisation's branding. Therefore, the organisation needs to approve the logo's use to ensure its brand is used appropriately in line with the relevant guidelines. Examples of when this could be necessary include invitation letters, sales campaigns and presentation material.

For simple documents, it is normally a matter of using existing templates (with or without a letterhead) for outgoing correspondence. In this case, use of the logo may already be pre-approved. Discuss the use of the logo with supervisors and colleagues, and refer to policy manuals if possible.

Ask your supervisor for direction in using logos and if there are any specific procedures to be followed.

Consistent corporate image

In some organisations it is very important to adhere to strict corporate image guidelines when producing certain types of documents.

How colours and the logo are used, and the layout and design of a document all reflect an organisation's image and how it is viewed by the public. Many organisations spend money creating a brand or image that is designed to send a subconscious message of what it is they are trying to achieve.

The use of a consistent corporate images reflects what the organisation considers to be important. Some organisations believe the use of colours can create certain feelings or emotions; for example, blue is said to be a more trusting colour. Organisations that aim to be seen as professional service providers may use a more traditional approach to the layout and design of documents, while organisations that want their image to reflect a more modern approach may have their letterhead with the logo and corporate details on the side of the document as opposed to the top. Fonts may also be chosen to reflect either a modern or conservative image.

House styles

Many organisations have style guides for producing documents, which is a list of rules for the font and layout.

Style guides may also outline rules for the type of words that are used in the document. For example, acronyms and jargon may be appropriate for internal review by managers, but may not be appropriate if the document is to be distributed to customers or the general public.

The following provides some examples of rules that may be outlined in a style guide:

- Arial 12pt font must be used for the body text of a standard letter.
- The date must be included in the upper right of the document in the following format: Day Month Year.
- The left margin must be indented at 4cm.
- File reference details must be provided at the top of the document in italics.
- A signature must be included at the end.

In many cases, if a standard template is used, predefined styles will automatically appear in the document. Clarify the use of style guides for your organisation with your supervisor and colleagues.

Content restrictions

It is essential that you adhere to restrictions on the type of content that can be used in documents you produce, and ensure that sensitive material is not included.

Some information that you have access to in an organisation is not for the public domain, such as information on profit expectations, customer contact details or specific customer buying habits.

Documents also need to be tailored to the intended audience, using language and terms that they understand. This includes minimising the use of jargon and confusing abbreviations.

Copyright

Organisations frequently refer to copyright and use disclaimers in documents they produce.

An organisation may follow a particular practice when using copyrighted material. For instance, if it is quoting from another source in the document, it may reference the text by author and page (e.g. Smith, p. 9), and then provide a more detailed reference as a footnote (e.g. Smith, P 2007, *The art of referencing*, The Book Press, Crows Nest, NSW).

To insert a footnote in Word, place your cursor at the end of the text where the reference needs to be inserted. Select the **References** tab, then select **Footnote**. A number will appear at the bottom of the page, where you can enter the reference details. You will notice that the body text now has a number at the end of it, which refers to the footnote. This can be used to take you to the reference details.

Disclaimers are commonly used for outgoing correspondence such as emails and newsletters. Disclaimers generally state that the information is for the intended recipient only, or it may state that the information was correct at the time of printing. However, further expert advice may be required before disclaimers are applied to a document.

Headers and footers

Headers and footers are used to record the same information about a document on each page.

A header appears above the top margin of the document, while a footer appears below the bottom margin. In some cases, templates may include a header that contains the organisation's letterhead with a logo and contact details.

You may be required to insert a header or footer that contains more information, including the organisation's name, the date and the document title. Most of this information is available as predefined buttons or fields; alternatively, you may need to type in the required information. Most organisations have specific guidelines to follow for what is to be contained in the header/footer. Apart from the company letterhead, in many cases the information in the header/footer is a smaller size than the body text, and may have a different font applied. The information that appears in headers and footers is repeated throughout a document, or within sections of a document.

To access a header, select the **Insert** tab and then click on the **Header** drop-down menu. Select a style option from the list. When your header or footer is selected, you will notice that the screen options change to the Header & Footer Tools **Design** tab. This tab contains various options to create a header/footer that suits your document, such as a different header/footer on odd and even pages.

From here you can either type in the header required, or select the appropriate buttons to insert predefined fields into your document (e.g. file name and date). Common options to use include **Page Number**, **Date & Time** and **Quick Parts**.

Once you have finished amending it, you can double-click on the main document to exit the header. It is also possible to access the header/footer by double-clicking on it directly.

Select most appropriate word-processing application

Although this learner guide focuses primarily on Microsoft Word, many businesses use other types of word-processing software.

The following outlines the functions and features of various word-processing applications.

Microsoft Word	One of the most common word-processing applications, Microsoft Word is widely used by homes and businesses.
	Key features include:
	• style and formatting options
	• spellcheck
	• templates
	• track changes, enabling users to see edits that have been made
	• password protection.

| Google Docs	This application allows multiple users to create and edit text files in real time. Anyone who has access to the document can see who is currently viewing and editing it, and who has made which changes. Key features include: • style and formatting options • suggested edits • action items to show which user is responsible for which task.
Apache OpenOffice Writer	OpenOffice Writer is an open-source word-processing application. This means it is free to use and that anyone is able to change the software to suit their needs. Key features include: • style and formatting options • templates and extensions.
Corel WordPerfect	This is one of the oldest word-processing programs still in existence, with the original release dating back to 1979. Key features include: • style and formatting options • keyboarding shortcuts • numbering each line, as required in legal documents.
Microsoft Publisher	This is a desktop publishing application suitable for documents that emphasise layout and design, such as brochures, flyers and posters. However, it generally creates a larger file format and may be difficult to view edits by various people. Key features include: • style and formatting options • templates • design tools • picture editing tools.
Adobe InDesign	This is a desktop publishing application widely used in the publishing industry to create professional-looking documents with an emphasis on design and layout, such as posters, flyers, brochures, magazines, newsletters and books. However, due to its extensive design features it can take a long time to load and files may not be shared easily. Key features include: • style and formatting options • design and layout tools • keyboard shortcuts • picture editing tools.

As you can see from the table above, there is a lot of overlap between different word-processing applications, and one is not necessarily better than the other. Your organisation may have a preference for a particular program. Find out which one is used in your organisation before beginning your document.

Practice task 6

In the following exercise, you will create a header and footer.

1. Open your MyLetter document.

2. Select th**e Insert** tab and select the **Header** drop-down menu.
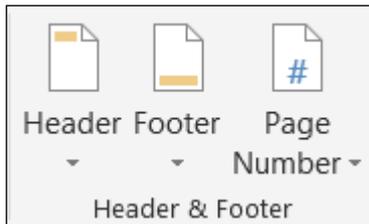
3. Select the **Blank** style header – this will allow you to enter text that is left-aligned. Type the word 'Agenda'.

4. Edit the footer, either by selecting the **Go to Footer** button from the Header & Footer Tools **Design** tab or by double-clicking on the footer at the bottom of the page.
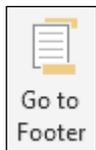
5. Type the file path of the document in the footer. From the **Design** tab, choose the **Quick Parts** drop-down menu, then select **Field**.

6. Select **FileName** and tick the **Add path to filename** option. This will insert a field that automatically provides details of the document's name and location. Click **OK**.

7. Save and close your MyLetter document.

Practice task 7

Part A

In the following exercise, you will create a template.

1. In Word, select the **File** tab, select **New,** then select **Blank document**.

2. Add clipart to the document to represent a corporate logo by going to the **Insert** tab and choosing **Online Pictures**.

3. In the **Bing Image Search**, type Clipart and the type of picture you're looking for. For example, 'Clipart Garden Centre'. Select an image and click **Insert**, then resize the image as appropriate.

4. Insert a disclaimer stating that the information contained in the document is for the intended recipient only. (If your workplace has a specific disclaimer, insert it here.)

5. Save the document as a template titled 'CompanyDocument'. To save as a template, select **Word Template** from the **Save as type** drop-down menu.

6. Create a footer that provides details of the file reference. To use the template, open a new Word document and select **Personal**, then select the template you saved. This will provide you with a blank pro forma of the document, which you can use and save as appropriate.

Part B

Question 1

What can be done to ensure the layout and design of a document meets the professional and corporate image of an organisation?

Question 2

You need to send a word-processed document in an email to colleagues. There is a limit to the file size that can be sent and received in your organisation, so you need to make sure the attached document is not too large. The document only contains text, with no images or graphs. Which of the following applications would be appropriate to use? Tick all that apply.

☐   Microsoft Word

☐   Adobe InDesign

☐   Microsoft Publisher

☐   Corel WordPerfect

☐   Apache OpenOffice Writer

Summary

- Safe work practices – including ergonomics, work organisation, and energy and resource conservation – enhance working conditions and help to improve the overall effectiveness and efficiency of the office.

- If the working environment is not monitored and controlled, you may suffer from headaches, fatigue, hearing loss or eyestrain.

- Understanding the purpose of a word-processed document leads to strong and effective communication.

- A word-processed document needs to be presented in a way that meets organisational and task requirements.

- Types of word-processed documents used by organisations include memos, agendas, minutes, reports, briefing papers, flyers, letters, standard form letters, mail merges, labels and envelopes.

- Organisations may use a template, which is a layout model for a document. They may have designed the template themselves or they may use one that is included in their word-processing software.

Learning checkpoint 1
Prepare to produce a document

Part A

1. You have been requested by your supervisor to develop the minutes of the staff meeting. You can follow the requirements of your organisation, or an organisation you are familiar with, or your trainer may provide you with a sample template. The template should be consistent with the organisation's style and layout requirements for minutes of a meeting.

2. Explain how you used safe work practices, including ergonomics, work organisation and the conservation of paper, when creating the document.

3. Explain the purpose, intended audience and presentation requirements of the document template you have produced.

<div style="border:1px solid #ccc; height:400px"></div>

Part B

Read the case study, then answer the questions that follow.

Case study

Angela works as an administrative assistant in a large organisation. One of her duties is to word-process documents for internal and external circulation. One day her manager gives her the outline of a report that is needed for a board of directors meeting the following week.

Angela clarifies with her manager why the document needs to be created, the level of detail required by the board of directors, and the presentation and layout requirements for the document. Angela also enquires about the report's security and discovers that the document will contain confidential material and should be protected at all times.

1. What were the **four** issues that Angela clarified before creating the report?

<div style="border:1px solid #ccc; height:400px"></div>

2. Explain why it is important to understand the purpose, audience and presentation requirements of a document before producing a word-processed document.

3. Describe what Angela would need to consider when preparing the design and layout of the document.

4. Describe what Angela should do to ensure she is working safely when producing the document.

Topic 2
Produce documents

When producing a word-processed document, you should use software functions and formatting options to ensure the document has a consistent design and layout.

You need to check and amend documents in accordance with organisational and task requirements. Developing skills in proofreading and editing will help you produce documents that are accurate and error-free.

Using the screen display options and controls of the software program can help you to check and proof the document before you print. They also allow you to manipulate the on-screen document, including the overall appearance and layout.

Before printing documents, you need to preview and adjust them to suit your organisational requirements. Manuals, training booklets and IT helpdesks can be used to help solve problems that arise when producing word-processed documents.

In this topic you will learn how to:

2A   Use appropriate software functions to format a document

2B   Overcome problems with documents

2A Use appropriate software functions to format a document

Word-processing functions are used so that documents have a consistent design and layout.

Common word-processing functions include formatting paragraphs, inserting page numbers, adjusting spacing, inserting headers and footers, and checking spelling and grammar.

When you open a new Word document, it will have a number of default settings, such as font type and size, paragraph indentation and spacing. You need to be able to alter these settings to produce documents that suit your organisation's style requirements as outlined in the style guide.

Ribbons – tool buttons

Commonly used tools are available on ribbons.

In Microsoft Word 2016, toolbars have changed significantly. The program now operates by using a number of 'ribbons' that provide access to commonly used tools. You need to familiarise yourself with the various tools that are available in Word 2016.

Ribbons are categorised under various heading tabs such as **Home** and **Insert**. Each category has a tab so you can easily switch to the different tool buttons you need to use.
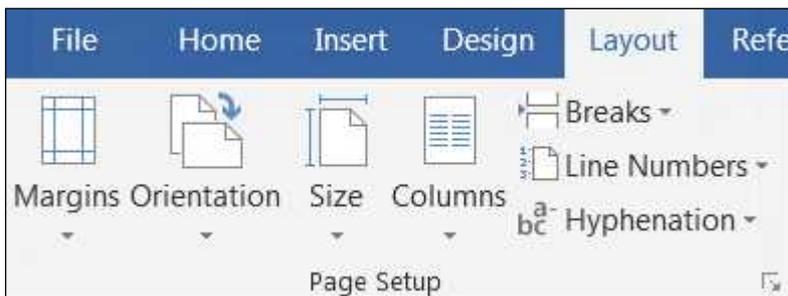

Additional tabs may appear with groups of tool buttons that are relevant to an action you are performing. For example, when you choose the **Outline** view, a new set of tools appears under an **Outlining** tab.

For each tab, there are groups of tools available. For instance, under the **Home** tab the available tool groups are:

- Clipboard
- Font
- Paragraph
- Styles
- Editing

Page setup

The page setup determines the margin size, orientation, size and number of columns on the page.

The **Layout** function allows you to choose options to change the overall appearance of a document by adjusting various options. As part of the **Layout** tab, there are various Page Setup tool buttons that enable quick and easy access to the options required to make alterations. You can use these options to alter the entire document or just part of it.

For example, you can change the orientation of a document from portrait to landscape. 'Portrait' means that the height of the document is greater than the width, like a portrait painting. 'Landscape' means the width of the document is greater than the height, like a landscape painting.

To modify the page setup of an entire document, place the pointer anywhere in the document. To modify a portion of a document, select the text you want to change by highlighting it (holding your mouse down while you drag over the text).

Practice task 8

In the following exercise you will need to use the page setup functions to set the margin, paper size, source and orientation of the document.

1. Open your MyLetter document.

2. Select the **Layout** tab, then select the **Margins** drop-down menu. Choose **Custom Margins**.

3. Adjust the margins by changing the values in the **Top, Bottom, Left** and **Right** boxes. Use the **Preview** display to guide your choices. When you are happy with it, click **OK**.

4. Select the **Layout** tab and select the **Size** drop-down menu. Make the appropriate choice for paper size.

5.   From the **Layout** tab, select the **Orientation** button. Ensure **Portrait** is selected.

6.   Save and close your MyLetter document.

Experiment with these options and view your document by going to **File**, then **Print** to preview the results of your choices. If you are unhappy with an option, you can undo it by clicking the top left arrow to go back to the **Home** tab and selecting the **Undo** button.

Paragraph formatting

Most word-processed documents are written in paragraphs and you need to know how to format them in accordance with your organisation's style requirements.

Paragraph formatting is used to break up the text on a page and create a more visually appealing layout. Paragraph formatting includes:

- indents – how far a paragraph is positioned from the margin
- alignment – how your paragraph text will appear on the page (right-aligned, left-aligned, centred or justified)
- spacing – the space before and after each paragraph and between each line.

To access paragraph formatting tools, go to the **Home** tab. In the Paragraph section, you can change things such as bullets, indents, and spaces between lines and paragraphs. Hover over each icon to learn more about what it does. You can also make more specific adjustments by clicking on the icon in the bottom right corner of the Paragraph section.

Pagination relates to the division of a document into pages, as in a book. For example, you can control where page breaks are positioned by selecting the paragraphs you want the options to control, then selecting the **Line and Page Breaks** tab in the Paragraph section and ticking or unticking the pagination options. For example, the **Widow/Orphan control** option, which is set by default, prevents the first or last line of a paragraph from being positioned on the top or bottom of a page.

Practice task 9

In this exercise you are required to set indents, spacing and pagination options for your document.

1. Open your MyLetter document.

2. From the **Home** tab, use the **Increase Indent** button or **Decrease Indent** button to move the paragraph forwards or backwards.

3. Select an alignment for your text.

4. From the **Home** tab, select **Line and Paragraph Spacing**, then select **Line Spacing Options** from the drop-down menu. Under Spacing, adjust the amount of space before and after each paragraph. The number is equivalent to the font size. For example, 6pt after means the space between lines is 6 points.

5. Select a few paragraphs in your document, then select the **Paragraph** tool in the **Home** tab.

6. Select the **Line and Page Breaks** tab.

7. Select **Keep lines together** to keep the lines in a paragraph together on a page or in a column.

8. Save and close your MyLetter document.

Tabs and rulers

Tabs are commonly used to position text horizontally on a page.

Using the tab key on the keyboard allows you to tab the text approximately 1.25cm at each stop – this is the default option. Alternatively, it is possible to use the ruler to place the tab stop at the required position.

To view tabs that have been inserted, you can use the **Show/Hide** formatting marks tool in the Paragraph section of the **Home** tab.

Any tabs that have been inserted will appear as black arrows.

Tabs can be aligned by selecting the tab stop at the top of the left ruler.

Each time you click, a different alignment option is selected (left-aligned, centred, right-aligned, decimal, bar, first line, hanging).

The ruler is used to judge where the margins, tab stops and indents are aligned on the page. The ruler enables you to see and alter their position. It is also useful if you are working with tables or columns. When the ruler is turned on, both a vertical and a horizontal ruler are displayed.

To turn the ruler on, from the **View** tab, tick **Ruler** ☑ Ruler

Practice task 10

In the following exercise, you will practise inserting tabs.

1. In your MyLetter document, select the **View** tab and tick the **Ruler** option. ☑ Ruler

2. Click on a paragraph in your document.

3. Select the alignment of the tab stop using the type of tab stop on the left of the ruler.

    └

4. If there are no tab stops, click on the ruler at the point where you want the tab stop to be positioned.

5. To remove a tab stop, simply drag it off the ruler.

6. To modify a tab stop, such as to add a leader (a dotted or dashed line), simply double-click on the tab stop on the ruler. Make alterations using the following dialogue box.
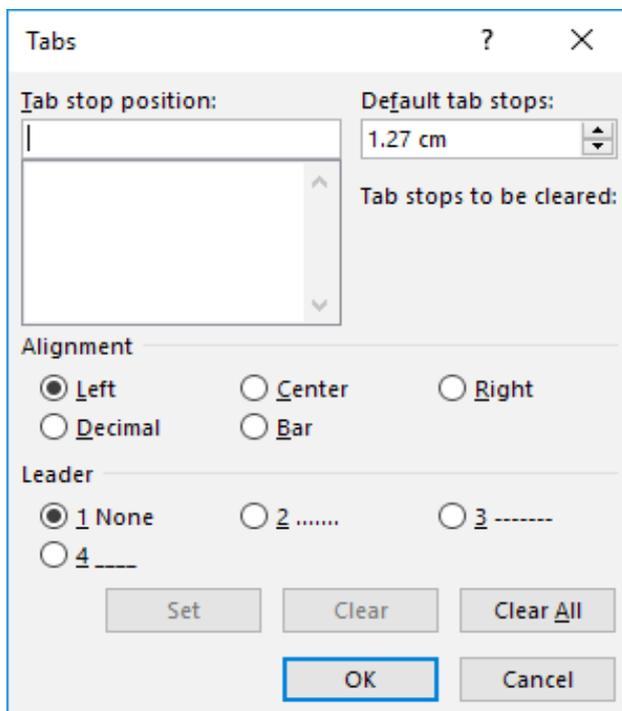
7. Click **OK**, then save and close your document.

Columns

Creating columns can be useful for the presentation and layout of certain types of documents.

Columns are commonly used for newsletters, reference manuals and other documents as they allow you to alter the way the information is presented. You can use this function to flow the information on a page over a series of columns, similar to that of a newspaper.

To change the number of columns, select the **Layout** tab, then select the **Columns** drop-down menu to choose the number of columns you want on the page.

# Format font type, size and colour

Organisations use font formatting to improve the readability and presentation of documents.

Font formatting can make the text more legible by increasing the size, emphasising text with the use of bold, underline or italics, and using colour to highlight important information or to draw the attention of the reader.
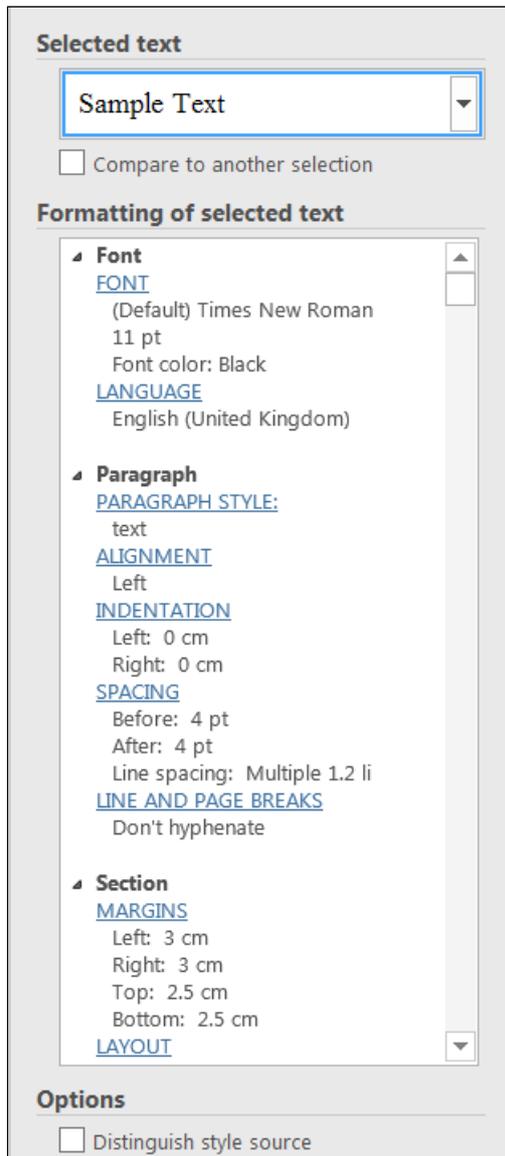
A font is the style of type used in a document, such as Times New Roman, Arial or Book Antiqua. As well as attributes such as bold, italic and underline, fonts can be different sizes and colours, and you can even add special effects.

Usually documents have a consistent style, such as one type of font for headings and another type for the main body of text.

From the **Home** tab, you can make selections using the formatting tools for Font, including changing the font type and size. Hover over each option for more information.
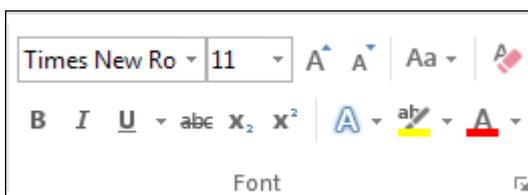
You can find out more about specific formatting of an on-screen document by pressing **Shift+F1**. This will display character and paragraph settings, which you can change by highlighting text and clicking on the relevant sections.

Selected text

Sample Text

☐ Compare to another selection

Formatting of selected text

◢ **Font**
FONT
   (Default) Times New Roman
   11 pt
   Font color: Black
LANGUAGE
   English (United Kingdom)

◢ **Paragraph**
PARAGRAPH STYLE:
   text
ALIGNMENT
   Left
INDENTATION
   Left: 0 cm
   Right: 0 cm
SPACING
   Before: 4 pt
   After: 4 pt
   Line spacing: Multiple 1.2 li
LINE AND PAGE BREAKS
   Don't hyphenate

◢ **Section**
MARGINS
   Left: 3 cm
   Right: 3 cm
   Top: 2.5 cm
   Bottom: 2.5 cm
LAYOUT

Options

☐ Distinguish style source

Practice task 11

For the following exercise, use the styling options to format the font.

1. Open your MyLetter document. Select a few sentences of your document. From the **Home** tab, change the attributes of the font by making selections using the formatting tools.

2. Select a few other sentences from your document. Change the font colour using the **Font Colour** tool.

3. Save your changes and close your document.

Bullets and numbering

Bullets and numbering can be used to create lists in a document.

This can improve the presentation of text and make it easier to read by breaking up the main points. You can access bulleting and numbering options from the Paragraph section in the **Home** tab.

A multilevel number list can be created using the **Multilevel List** button. The paragraph level can be adjusted by clicking the **Increase Indent** or the **Decrease Indent** button from the formatting tools.

Below are examples of different styles of lists.

Bulleted list

- A bullet, such as a thick dot or hyphen, is inserted at the start of each new paragraph.
- The bullet and text are indented.

Numbered list

1. A number is inserted at the start of each new paragraph.
2. If you add or delete a paragraph from the list, the numbering will automatically update.
3. You can also right-click on a number and set a different numbering value using the drop-down list.

Multilevel list

- Multiple features can be highlighted with multilevel lists:
  – These lists are good for indexes or other complex documents.
  – Each list level has a different indent.
- Numbers or letters are automatically inserted:
  – Explore the options in the drop-down list.

Borders and shading

You can use borders and shading to organise or emphasise certain parts of a document.

You can add lines, boxes and shading to paragraphs, selected text and tables. A border can also be used to frame an entire page. You can access borders and shading options from the Paragraph formatting tools in the **Home** tab.

Practice task 12

In the following exercise, you will add borders and shading to a document.

1. Open the MyLetter document. Select some text in the document. Select the **Borders** drop-down menu from the **Home** tab.

2. Select a line type for your border, e.g. **All borders**.

3. Using the same selected text, select the **Shading** drop-down menu.

4. Choose a colour.

5. Save and close your document.

Page numbering

Page numbering is commonly used in long or formal documents, such as reports.

It may also be used in outgoing correspondence, such as letters. Page numbers can be placed on each page by selecting the **Insert** tab and using the **Page Number** drop-down menu.

You can use the drop-down menu to select where the page number will be positioned, such as at the top, bottom, left or right side of the page. You can also adjust it further via the header and footer; for example, adding the word 'Page' before the number, or changing the font type and size.

Screen display options

Screen display options allow you to manipulate and control the document on screen.

You can alter how information is viewed to make it easier to read on screen and enable you to visualise the document before you print it. Screen display options can also be used for working on a number of documents or programs at once.

To alter your on-screen view, go to the **View** tab and select the appropriate button under the Views section. The most common view used is **Print Layout**.
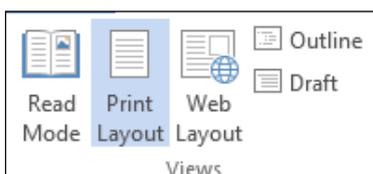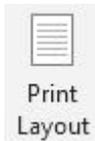
Use the view control at the bottom right of the screen to quickly adjust the view of the document – simply click on the appropriate option to change the on-screen view.
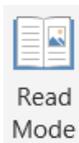
The differences in the views are as follows.

Print Layout	
Print Layout	Allows you to view the document as it will appear when it is printed. Page margins and headers/footers are all in view. The break to a new page is obvious in this view.

Read Mode	
Read Mode	Hides the writing tools and menus, and leaves more room for the pages themselves. Read Mode automatically fits the page layout to your device using columns and larger font sizes, both of which can be adjusted.

Web Layout	
Web Layout	Enables you to view the document as you would view a web page. Page breaks, page margins, and headers and footers are not displayed. Some people have a personal preference for working in this view as it focuses on the content itself.

Outline	
Outline	Allows you to view the document in outline form. This is useful for longer documents or reports where styles are used much the same as chapter headings. The Outline view allows you to manipulate blocks of text. In this view, you are automatically prompted to use a new set of tools under the **Outlining** tab.

| **Draft**	
Draft	Enables you to work in the document to make necessary adjustments to text and content. Page margins, headers and footers are not visible.

Zoom options

To make documents easier to read on screen and check the overall layout, there are various zoom options available for use.

You might want to zoom in and increase the size of the document to see text and objects more clearly. You might want to zoom out and decrease the size of the document in view to analyse the text layout and overall document presentation.

The zoom control at the bottom right of the screen can be used to quickly adjust the zoom view of a page. Simply move the control up or down to change the zoom size of the document.

To access zoom options, from the **View** tab, select the **Zoom** tool button.
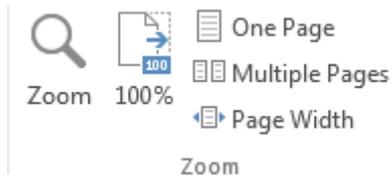
This opens the Zoom dialogue box to enable you to specify the zoom level of the on-screen display. You can choose to check the predefined zoom sizes, or you can manipulate it by typing in a percentage or by selecting how many pages you want to view.
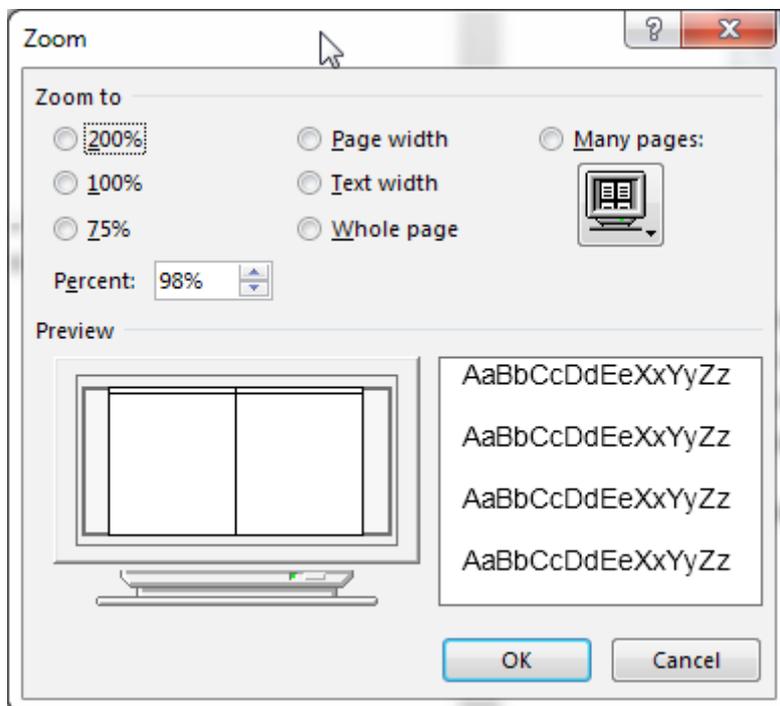
Other options in the Zoom section are as follows:
- **100%** zooms the document to its normal print size.
- **One Page** adjusts the document so an entire page fits in the on-screen view.
- **Multiple Pages** adjusts the document so multiple pages fit in the on-screen view.
- **Page Width** adjusts the on-screen view so the width of the lines of text matches that of the window.
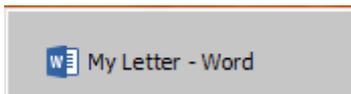
Maximise and minimise the document window

Maximise and minimise options are regularly used when working in any Microsoft program.

You can use minimise to hide' the document from view. When you minimise, you are not closing or saving the document, you are just putting it away from view for the moment. You may want to do this to view another document or window.

To minimise the document, use the minimise button in the top right of the title bar.

Alternatively, you can click on the document name in the list of documents that are open at the bottom of your screen.

To maximise a document, simply click the document name in the list of documents that are open at the bottom of your screen. This will put the document into view, and it becomes the active document that you are working in.

If the document window is in restore mode, it only takes up part of your screen. To maximise the document, use the maximise button in the top right of the title bar.

Print preview

Print preview is useful to check the layout and presentation of a document before you print it.

It is a useful proofing tool and a good habit to get into to save time and paper. The purpose is to check you are happy with the way a document appears before you print it.

To access print preview, select the **File** tab, then select **Print**.

The document will appear in a preview window to the right of the screen.

Practice task 13

1. Open your MyLetter document.

2. Select the **View** tab and change the viewing option to **Draft**.

3. Check the layout and presentation of the document by using the zoom tool to view one page at a time.

4. If the ruler is not on, turn it on so it is in view. Place a tab stop at 4cm on the ruler. Go to the start of the line of a paragraph and press the tab key once. The text should now be positioned 4cm from the page margin.

5. Using the **Home** tab, format the text in one paragraph using options such as bold, font type and size.

6. Using the **Insert** tab, insert a header into the document, then type your name and the date.

7. Using the **Layout** tab, check that the orientation of the document is portrait.

8. Minimise the document window so that it is not in view.

9. Maximise the document window and print preview the document. Make any alterations as appropriate and send the document to print.

10. Save and close the document.

2B | Overcome problems with documents

When it comes to producing documents, you need to have a plan in place for dealing with the unexpected.

For example, you may not understand how a word-processing software function works, or you may need help operating a printer. Organisations usually have a number of ways of dealing with software or hardware problems. They may have manuals or training booklets for you to look at, or there may be an IT helpdesk you can refer to.

Help with using tool buttons

Each time you move the pointer over a tool button, it will display a bubble that tells you what the button is used for.

For instance, from the **Home** tab, move the pointer over the font tools and you will notice the bubble for the **Change Case** tool button as follows:
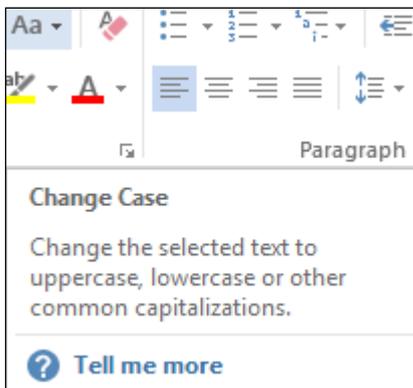
Using the help function in Word

If you are working in Microsoft Word, you can use the help function to assist you to do certain tasks.

Tasks that you may need help with include:

- formatting text
- adjusting the size of margins
- inserting pictures, graphs and charts
- formatting tables
- adjusting print settings
- inserting columns and section breaks.

Full access to the help function requires you to be connected to the internet. It is possible, however, to access standard help functions offline. To use this function, search for what you want help with in the search bar.
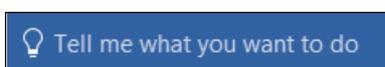
You can also press F1 on the keyboard to access the help facility.
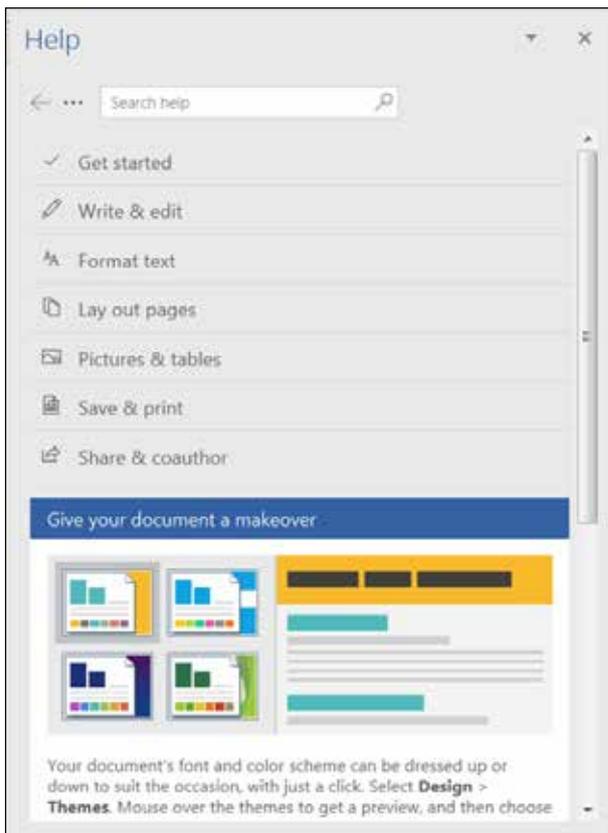
Taking screenshots

It can be helpful to take a screenshot to communicate the issue you are having to someone else.

A screenshot captures the image of your computer screen in its current state, including any error messages that are being displayed. If you are having a particular issue with your computer that is difficult to describe, it can be useful to take a screenshot and send this image in an email to the IT department or a colleague who may be able to assist.

To take a screenshot, press the **Print screen** icon on your keyboard. This may be displayed as an abbreviation, such as 'PrtScn'. Then simply insert the image into an email by pressing **Ctrl+V** on the keyboard or by right-clicking the mouse and selecting **Paste** from the drop-down menu.

If you are using two screens, the image will show both of your screens. You may need to crop part of the image to focus on the issue you are having, such as an error message. To do this, click on the image and under the **Format** tab, select **Crop**. Then you can simply drag the edges of the image in to focus on the issue.
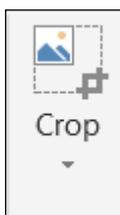
Help manuals and training materials

Word-processing software comes with user manuals that describe the software's features and provide step-by-step instructions for carrying out different functions.

You can find manuals in print and electronic formats. For example, you may be able to find paper-based manuals in your organisation or in your local library.

There are many websites where you can find information about Microsoft Office applications. These contain solutions to common problems and frequently asked questions. You can also download updates, tools and any fixes Microsoft has developed for software problems. You may find the following sites useful.

http://aspirelr.link/microsoft-support

This is Microsoft's main site for finding help to solve problems for all Microsoft products. You can ask questions online and download files, including service packs, drivers and patches.

http://aspirelr.link/microsoft-office

This site provides resources for all Microsoft Office applications. It has news and announcements, as well as useful files that you can download. If you are connected to the internet, you can open this site by selecting Help in any Office application. You may need to click on the bottom right of the window to allow access to Office.com.

Another resource you can refer to is training material. Training courses usually provide a comprehensive set of instructions or notes that are worth keeping for future reference.

You may have been to a training course to learn a particular computer function or a supplier may have instructed you on how to use a piece of equipment. You may have received training or induction materials when you started a new job.

You may need to refer back to your training notes whenever you need help with a specific program or function.

Practice task 14

Read the case study, then answer the questions that follow.

Case study

Mohana works as a personal assistant to a manager in a large organisation. One of her roles is to word-process a variety of documents. While producing documents, Mohana often needs to use the help function to assist her to use the software. If she is unaware of what a screen icon's function is, she hovers over the icon with her mouse and reads the bubble displayed.

Sometimes Mohana uses Microsoft's support website to find solutions to software problems that cannot be solved using the help function. There are manuals available in Mohana's workplace and she has photocopied the pages she refers to most frequently. She also keeps electronic copies in a help folder on her desktop.

Question 1

If Mohana experiences software problems while using Microsoft Word, where does she go to first for help?

Question 2

If Mohana is unaware of a screen icon's function, what does she do?

Question 3

Describe how Mohana stores help manuals.

Question 4

If you experienced a software problem when producing a document, describe the steps you would take to solve the problem.

Summary

- Software functions and formatting options can be used to ensure the document has a consistent layout and design.
- Screen options and controls provide ways for you to check and proofread the document on screen before you print it.
- Before printing, print preview the document to ensure it suits organisational and task requirements.
- Using help facilities, reference manuals and training booklets can assist in solving problems that occur when producing documents.

Learning checkpoint 2
Produce documents

Part A

1. Word-process this text. Format the document using different fonts for headings and the main body text. Use bold and italics to emphasise text and insert a page number, right-aligned in the footer. Save your document as 'MyActivities'.

Activities for fitness

Get more play into your day. There are many ways to get active and have fun too. Go skateboarding, fly a kite, throw a frisbee or kick a ball around. Walk the dog, shoot some hoops or play footy with friends.

Get organised. Play football, basketball, netball, tennis, hockey, soccer or another sport. You could also enrol in dancing, go rollerblading, go bowling or join a swim team.

Get back to basics. Develop and practise basic skills like throwing, catching, hopping, skipping and jumping.

Warm up first. Start your fitness program slowly and gradually pick up the pace. Do some stretches before a run or strenuous activity.

Cool down at the end. As you complete your activity session, cool down your muscles by slowing the pace of your activity before stopping.

Prevent injuries. Make sure you always wear the right protective gear for the activities you choose, such as helmets, knee pads and mouth guards.

Work out a plan. Figure out the best time for your chosen activities, such as before or after school or work. Don't waste your weekends or holidays sitting in front of the TV.

Miss the bus. Walk to school, ride a bike to work, rollerblade or jog to the shops. Or simply get off the tram or bus a few stops early and walk the rest of the way.

Cut down screen time. Count how many hours you spend in front of the TV or computer and try to cut them down. Browsing social media and sending emails can be stimulating, but try to limit the time you spend staring at the screen.

Get some coaching. If you show promise in a particular sport or you want to improve your skills, think about getting a coach, trainer or mentor. Don't be shy; talk to a fitness instructor, gym staff or a local community centre.

Drink plenty of water. Drink water before, during and after each activity.

Part B

1. Suggest **three** ways you could overcome a problem with a document you are unable to print.

2. What is a quick and easy way to learn and identify the images in the tool bar?

Topic 3
Finalise documents

Thoroughly checking and proofreading a document before distributing it is necessary to ensure the correct message and corporate image are being delivered to the appropriate people.

Ensure that you produce quality documents that adhere to organisational and task requirements. For example, if you have not spell-checked a document and it contains errors, or if you use the wrong letterhead, it can be negatively received by others and reduce the quality of the document.

When preparing documents, it is important that you adhere to the required time lines and task requirements. If you believe that alterations to either the time line or job instructions are necessary, you will need to discuss this with your supervisor. Many businesses have strict deadlines for completing tasks. For example, documents or reports may be required to be signed off by the end of the week. If you fail to meet the deadline and don't send out the required documents or reports, this may affect other tasks.

In this topic you will learn how to:

3A   Meet time lines and print a final document
3B   Name and store documents securely

3A | Meet time lines and print a final document

All word-processed documents need to be checked to make sure they meet style and layout specifications.

Documents also need to be checked to make sure the information is accurate. Word-processed documents require time to edit and proofread before they are printed, published and/or distributed to colleagues. You may need to check style and layout specifications and look out for spelling and grammatical errors.

Determine and meet time lines

Whenever you are given a work task, you need to determine a time line for its completion.

A time line is a plan for how long a task will take to complete. It also breaks the task into steps and details when each step needs to be completed by. Using a diary system and a to-do list can help you to prioritise tasks and keep on top of the time lines required for set tasks.

In many cases, time lines are set and agreed with your stakeholders – both internal and external:

- Internal stakeholders are those that work at the same organisation as you, and may include colleagues in other departments, managers and supervisors.
- External stakeholders are those that are outside the organisation, including customers and suppliers.

Often your manager or supervisor will give you a deadline for completing a set task (e.g. prepare a draft letter by 2pm). Alternatively, you may have deadlines for completing regular work tasks, e.g. completing a monthly sales report or sending letters to customers who are overdue in paying an invoice by a certain number of days.

Meeting a deadline demonstrates your competency and professionalism in undertaking tasks. Make sure that when deadlines are set, they are both achievable and realistic.

If you have concerns that a deadline might not be met or you have conflicting work priorities, discuss this with your manager or supervisor as soon as possible. They may be able to assist you by suggesting how the deadline can be met or agreeing to adjust the time line for the task.

Edit and proofread final document

Whenever you produce a document, you should check the spelling and grammar before distributing it to your audience.

Taking time to edit a document allows you to refine it to make sure you have written it in the best way possible.

Editing is also used to check that documents meet organisational layout requirements and to identify and correct errors in grammar, punctuation and spelling. Proofreading means checking that the final document is the same as any draft document you were given to copy. For example, your manager may give you a handwritten letter to word-process. You will need to proofread your document to make sure you have copied it correctly.

Developing a checklist may be helpful, as you can go through all the points that need to be considered before a final draft of the document can be made. Using a checklist can improve the speed and efficiency of proofreading. If your organisation does not use a checklist, consider developing one for you and others to use.

Spelling	Never rely entirely on the spell-check function on your computer. It only identifies spelling errors, not words that have been used incorrectly. Words may also be spelled in different ways; for example, American and Australian spellings of words such as organize/organise. Check your organisation's style manual or ask your manager if you are unsure.
Grammar	Grammar and punctuation suggestions made by software applications are not always correct. Check them yourself before accepting the suggested change.
Style	Styles should be consistent throughout the document. Make sure headers and footers are correct, and that spacing is consistent throughout. Check your organisation's style manual or ask your manager if you are unsure.
Numerical data	If you are working with numbers, match your document with the original figures you were given and make sure they are accurate. It is easy to make a mistake when entering a lot of numerical data into a document.

Spelling and grammar checker

Word-processing software allows you to check your spelling and grammar.

You can check spelling and grammar as you go or can choose to check the entire document at the end.

The word-processing software can be set to a default dictionary, which is usually based on the language and country of usage; for example, English (Australia).

If you make a spelling error, a red wavy line will appear underneath it. If you make a grammatical error, either a brown dotted line or a double blue line will appear underneath the error.

Be aware that an electronic spelling and grammar checker will not always pick up words that are used inappropriately (such as using 'there' instead of 'their'), so it is best to also proofread your document. You will need to use your discretion to decide whether the suggestion actually is the best (or even correct!) option.

Practice task 15

For the follow exercise, you will use the spelling and grammar checker to check spelling and grammar as you type.

1. Open your MyLetter document.

2. From the **File** tab, select the **Options** button, then select the **Proofing** tab.

3. Ensure that the following are ticked:

   - **Check spelling as you type**
   - **Mark grammar errors as you type.**

4. Click **OK**.

5. Enter more text into your MyLetter document. Look out for lines underneath your text that indicate an error in spelling or grammar.

6. To do a spell check, go to the **Review** tab and select **Spelling & Grammar**.

The spelling and grammar dialogue box will appear. The spelling and grammar function will then highlight errors and suggest changes. Select the most appropriate choice for each option and click **Change**. You can also **Add** or **Ignore** words that the spell checker does not recognise.
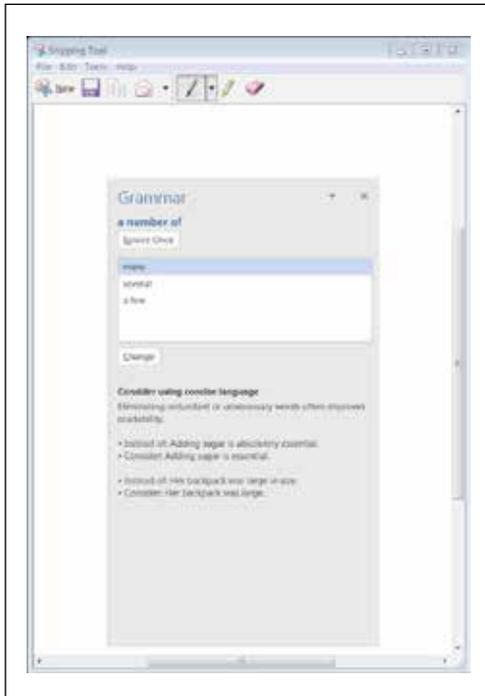
Ensure information is accurate

It is important to ensure the contents of any documents you are producing are accurate.

If the information contained in the document is not accurate, it can cause problems for your organisation. For example, you may be asked to send out a letter of offer with a quoted price to a customer. If you accidentally mistype the quoted price as $35,000 when it should be $85,000, this could cause serious problems when the final invoice is sent out to the customer requesting full payment.

Taking the time to check information and make sure it is correct helps to save time, improve efficiency and increase customer satisfaction.

As part of the proofing process, check that the following are correct:

- Name and address details
- Product information and pricing
- Dates
- Reference details
- Spelling
- Grammar
- Facts and instructions, e.g. required action for the reader to take

Follow content and format instructions

Guidelines or instructions should be followed when word-processing documents.

These may relate to the content of the document, its format or layout. For example, you may be asked to draft a letter to a supplier about upcoming orders, taking care to highlight the number of orders and dates expected for future orders. You should also check the product codes before printing it on corporate letterhead. These are specific instructions on how to produce the document. If you do not follow these instructions correctly, it may cause issues and delays.

Remember to clarify instructions if you are unsure and ask what else may be needed in the document. If you have your own ideas on how the content or format could be improved, discuss these with your supervisor.

Print documents

Once a document has been checked for accuracy, you may be required to print it.

Before printing, use the print preview option to see how the document will look on the printed page. To see the preview, select the **File** tab, then **Print**. This will provide you with a print preview and allow you to adjust the printing specifications. For example, you can change the number of copies, select a range of pages to be printed, choose to print double-sided and adjust the size and orientation of the document.

The **Collated** option controls the order in which multiple-page documents are printed. For example, imagine you want to print two copies of a three-page document. If you choose **Collated**, Word will print all of document 1, followed by all of document 2. If **Collated** is not chosen, Word will print page 1 of each document, followed by page 2 of each document and page 3 of each document.

You can also select **Printer Properties** and **Page Setup** for more options.

Practice task 16

In the following exercise, you will be required to print a document.

1. Open your MyLetter document.

2. Select the **File** tab, then **Print**. If you are not happy with the preview, click the back arrow and modify your document, then repeat the process.

3. Under the Printer heading, select the appropriate printer.

4. Under Settings, select **Print all Pages**. By selecting this, you will print the whole document. You can also choose to print selected pages from the document by entering page numbers into the Pages field, e.g. 3-9.

5. Click **Print** to print your document.

Practice task 17

Part A

Proofread this document. Correct spelling, punctuation and grammatical errors to improve accuracy and consistency. Also check for consistency of style. Save your document as MyProofreading.

Porf reeding

Reading a docuemtn that has glarring speelling erors is very distracting. Bad punctuation, inconsistencies in text, inappropriate grammar, missing text or poore lay out all detract froma docuemtns readability. Therefore, all documents that are going to be read by anyone, other than the originator, must follow this golden rule - Porf It First

Make sure that your work is free from anything that could undermine the message you are trying to communicate: It is dificult to proof-read your own work as you only see what you expect to see. Ask a colleegues or friend to profread any word processed doeumnt that yu have to produce.

When you are proff reeding check for:

Speelling mistakes;

Incorrect: capitalisatio

poor punctuation

Inconsistent use in style, headings, tenses, etc

Misnumbered; sequences

formatting inconsistencies

Factual erorrs

Part B

Read the first case study, then answer the question that follows.

Case study 1

Mary is the customer service officer for a large bathroom supply company. She regularly takes calls from customers enquiring about discounted items and the price of goods. She recently took a call from Tim, who said he was a regular customer and that he had seen an antique bath on sale for $700 in the local paper. Tim asked Mary to confirm the sale price and closing date of the sale in an email as he had misplaced the advert. Mary was happy to oblige.

Question 1

What does Mary need to clarify to ensure that the information she sends is accurate?

Read the second case study, then answer the questions that follow.

Case study 2

John works for a small not-for-profit organisation. Part of his job is to create a monthly newsletter to send out to the organisation's clients. The content and format of the newsletter follow a standard outline, and John's supervisor is happy with the comments he has received from clients about how easy it is to read. John always has a short deadline in which to get the newsletter prepared because he is often held up waiting for contributions from others in the organisation.

John thinks the newsletter is not modern enough and has decided that he will change the font type and logo. He intends to send the newsletter out to the existing client base, as well as local businesses in the area. John believes that this will attract new supporters to the charity.

Question 2

What instructions should John follow to produce the newsletter?

Question 3

Do you think John is right to make changes to the newsletter?

Question 4

Why is it important that John meets the deadline for finalising and distributing the newsletter?

3B | Name and store documents securely

How information is stored and the security measures used to protect it will be outlined in an organisation's procedures.

For example, the documents you word-process might be stored on a server that allows access by multiple users. A server holds a large number of files and folders, and delivers information and software to other computers linked by a network. Organising this information helps users find what they want quickly and efficiently. If you are saving information onto a server, make sure you know where to store it.

To enable staff to log on to a server, the systems administrator issues each person with a username. The user must then create a password. Usernames and passwords give users access to the information they require to complete workplace tasks and allow the administrator to allocate different levels of access to information.

Data security

Find out what your organisation's policies are regarding the storage and security of word-processed documents.

Some of the documents you are required to word-process may be confidential. If this is the case, ask your manager for your organisation's policies regarding confidential material. For example, you may need to save documents in a folder where only authorised people have access.

Data needs to be safeguarded against accidental or deliberate damage. Data loss is usually caused by human error or system failure. Some organisations use a data cartridge to back up the information on a database. This cartridge can then be taken offsite for security. This means that if any damage occurs to the server or the premises, a complete back-up is available.

Create a document to be used by previous versions of Word

Microsoft Word 2016 has some features that are not available in previous versions.

If you are creating a document that people with an older version of Word need to access, you will need to work in Compatibility Mode. Compatibility Mode turns off some of the new features, which ensures that people working in older versions (such as Word 2003) will still have full editing capabilities.

To create a document in Compatibility Mode, select the **File** tab, then select **Save As**, and under the **Save As Type** list, select Word 97-2003 Document.

In the File name box, type the name of your document and click **Save**.
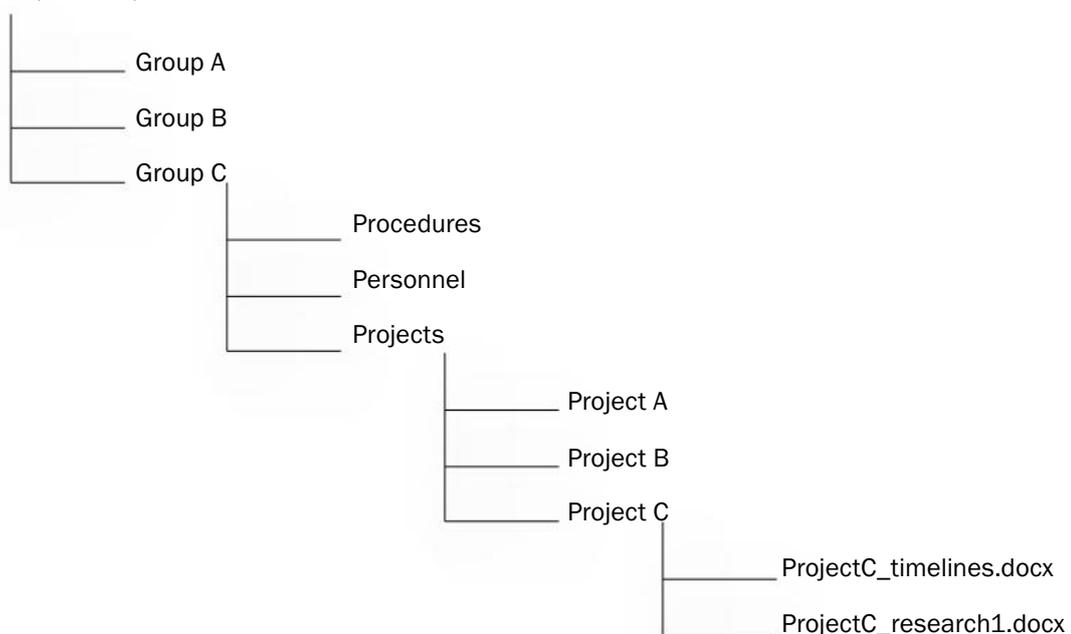
Folder structure and naming standards

Folder structure and naming standards are needed to allow staff to set up folders quickly and easily.

All organisations have policies and procedures for naming and storing documents. Ask your manager to explain your organisation's requirements. Documents can be stored in soft or hard copy. This means they can be stored electronically in a computer, or printed and stored in a filing cabinet.

Some organisations have strict naming standards that must be adhered to, e.g. all project files must start with 'PRO_'. Another example is using client reference numbers rather than names. If there are many clients with the same surname, a unique reference number will avoid confusion. Find out the naming standards for folders and files in your workplace and ensure you follow these. Ask your supervisor if you are unsure.

Files will also need to be saved in folders. Folders have a treelike structure that branches from a parent directory to sub-folders in a hierarchical structure.

SERVER (C DRIVE)
```
├── Group A
├── Group B
└── Group C
        ├── Procedures
        ├── Personnel
        └── Projects
                ├── Project A
                ├── Project B
                └── Project C
                        ├── ProjectC_timelines.docx
                        └── ProjectC_research1.docx
```

In the example structure above, the server has three folders for three separate work groups:

- Group A
- Group B
- Group C

Group C has three major folders:

- Personnel
- Procedures
- Projects

The Projects folder includes:

- Project A
- Project B
- Project C

Project C has two documents (or files):

- ProjectC_timelines.docx
- ProjectC_research1.docx

The file path for retrieving a document starts at the server and ends when the correct document is located. For example, to reach ProjectC_timelines.docx, the file path to follow is: C:\GroupC\Projects\ProjectC\ProjectC_timelines.docx

Document protection

*Documents you create may be confidential and thus require protection.*

Word-processing software includes a function for creating password protection on individual documents. When you password-protect a document, you should write the password down and store it in a secure place.
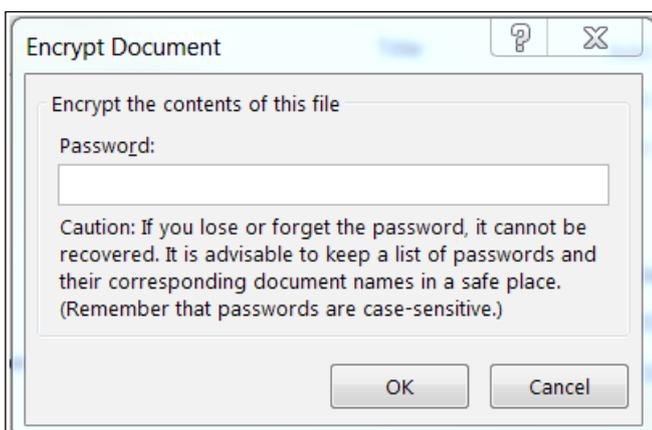
Practice task 18

In the following exercise, you will password-protect your MyLetter document.

1. In your MyLetter document, go to the **File** tab. **Info** is selected by default.

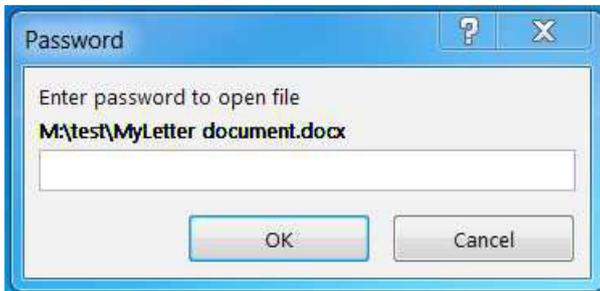2. Click **Protect Document** and select **Encrypt with Password** from the drop-down menu.
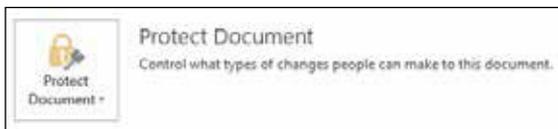
In the Password box, type a password and click **OK**. In the **Confirm password field,** re-enter the password and click **OK**.

Protect Document will now be highlighted in a yellow cell.

3. Save and close your MyLetter document.

4. Reopen your document using your new password. Close your document.

Digital storage

Many organisations prefer to store information digitally as digital storage saves on paper and space.

Paper documents can be easily torn, misfiled or accidentally disposed of. Storing many physical documents can also be expensive.

Another advantage of storing documents digitally is that databases can be used to search all stored information. Databases enable you to find specific information that would be much harder to find by searching through hard copies of documents. Databases also provide management with powerful metrics and reporting tools. For example, statistical information can be gathered from a database and detailed reports can be produced.

In many organisations, folders and files are stored on servers. Deleting old electronic files and folders needs to be done regularly to ensure an efficient use of server space. Always ask for authorisation before deleting any files or folders.

Hard-copy storage

Many documents stored digitally are also stored in hard copy.

This safeguards against a computer system failure. Hard-copy storage requires space and the establishment of a filing system that uses consistent, simple and meaningful names similar to those used in digital storage.

Hard-copy documents need to be kept up to date. Managing hard-copy documents is necessary as storage space in organisations is often scarce and valuable. Old or superseded documents should be destroyed on a regular basis according to organisational policy. Retention schedules list the timeframe that documents need to be kept before they can be destroyed. Certain documents may be scheduled for eventual deletion. Find out what kind of hard-copy filing system is used at your workplace and ask your supervisor if you are unsure.

Shared directories

Shared directories are folders on a network that a group of people have access to.

Decide which documents are for your use and which need to be shared with others to determine whether a file should be placed in the shared directory or whether it should stay on your computer's hard drive.

> **Advantages of using shared directories include:**
>
> - Work is less likely to be duplicated.
> - It makes it easier to share information between colleagues.
> - Documents on the same or related subjects are located together, which helps people find and retrieve files.

To set up a shared directory, you must first allocate a shared network drive. Your IT coordinator can help with this.

Document properties

It can be helpful to use document properties to record common information about a document.

Document properties help to describe or identify a document and include details such as the title, author name, subject and keywords that state the document's topic or content. The information contained in document properties can also be used when conducting a search for files on your computer.

To access properties, select the **File** tab. **Info** opens by default. Under the Properties section, you can add information such as the title, tags and comments.
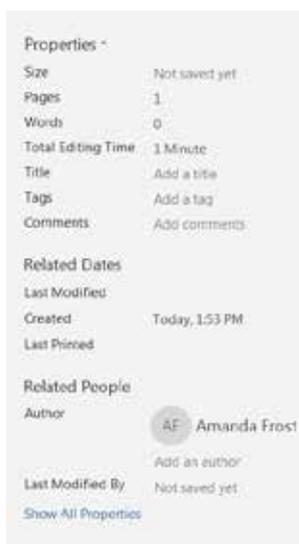
Back up files

Many organisations have set procedures for backing up files.

In many large organisations, this is administered through the IT department and is an automatic process. In this case, the only thing you need to do is ensure you save your files to the appropriate network drive and folders.

In smaller organisations, it may be necessary for you to back up files; this may be done on a daily or weekly basis. You may need to check with your supervisor about back-up procedures.

Backing up files is an important procedure because it helps prevent the loss of documents and information, and is extremely useful in case something happens to the network or computer system and you still want to retrieve previous documents.

Prevent data loss

After creating or modifying an electronic document, you need to exit the software application without causing damage or loss of data.

Data loss can occur when a computer program stops performing its expected function. Often the program, or even the whole computer, may appear to freeze. You may experience data loss and may be unable to access data. Data may have been accidentally erased or corrupted and made inaccessible.

The main cause of data loss is human error. Below are a number of precautions you can use to prevent data loss.

Work on one document at a time

Try to work on only one document at a time. If you need to work with multiple applications open, you should close applications when they are no longer needed. This will help your computer work more efficiently and will help to prevent data loss in the event of computer failure.

Lock unattended workstations

Data loss can occur if someone else tampers with your work. If you are working on a document, ensure you lock your computer or exit the application before leaving your workstation.

Use virus protection

Other causes of data loss include damage from viruses, operating system or application software bugs and failed upgrades. Using virus protection programs and frequently updating software can help to prevent data loss.

> **Prevent computer malfunction**

If your computer starts to make unusual noises or display warning messages, save your work, then shut down the computer immediately and do not turn it back on until you have received advice from an IT coordinator.

> **Use the correct exit procedure**

Before shutting down your computer, exit all programs by selecting the exit button, which is generally located in the top right corner of the window. Ensure you save your work first. If you have recently made changes to your document, you will usually be prompted to save before exiting.

Practice task 19

Read the first case study, then answer the questions that follow.

Case study 1

Matthew works as an office administrator in a large organisation. His duties include formatting reports and saving them on the server. He is also responsible for backing up the server at the end of each day.

At the end of a busy day, Matthew had completed several reports for different departments in the organisation. He had to save each of them in a different location, and it took him a while to work out where they all belonged. He wasn't sure if he had saved them all in the correct place. After this, he was running late for an appointment and decided not to back up the server.

The next morning, the reports that Matthew had saved were needed for an important board meeting. However, during the night a virus had infected the server, destroying all the data from the previous day.

Question 1

What would be the consequences if Matthew did not save some of the reports in the correct place?

Question 2

What are **two** possible consequences of not backing up data on the server?

Read the second case study, then answer the questions that follow.

Case study 2

Fred has retired from an organisation after working as an administrative assistant for 10 years. The areas Fred was responsible for were accounts and projects. The day after he retired, someone needed a file that Fred had created and stored. The file contained vital accounting information. It was discovered that Fred had saved more than 500 files in a variety of folders and the file could not be located. The folders had ambiguous names such as Folder1 and Folder2 and the files had names such as august1.docx and march2.docx.

Question 3

Describe why Fred's folder and file naming system failed.

Question 4

Fred was responsible for two areas. What could he have done to make sure files could be easily located?

Question 5

Explain why folder and file names should be consistent, simple and meaningful.

Summary

- Not meeting time lines or following instructions can have a negative impact on the organisation.
- To ensure the production of quality products, it is important to thoroughly check and proofread the final document.
- Developing your skills in proofing and editing will help in the production of error-free documents.
- Documents produced need to adhere to organisational and task requirements.
- Following appropriate file-naming and storage conventions makes it easier to locate documents.
- Following organisational back-up procedures reduces the chance of lost data.

Learning checkpoint 3
Finalise documents

Part A

Word-process the following text. Make **two** drafts of the text using different formatting styles and layouts. Each document should have its own consistent style, but the documents should be very different from each other. Be as creative as you can with your formatting styles and layout. Remember that the main aim of formatting is to make the document easy to read.

When producing the document:

- Check the documents for spelling and grammatical errors.
- Print preview and check the documents.
- Make any adjustments before printing them.
- Save the documents to an appropriate file path and name your documents CallCentre1, CallCentre2, CallCentre3.
- Exit the program.

Types of call centres

The way a call centre is organised differs from one call centre to another. Some call centres divide their services very clearly into sales and customer service, with an operator dealing exclusively with either sales or service support. Some large centres have created different sections to deal with different aspects of a product, so when a customer calls, the call is sent directly to the specialist.

Inbound calls

Some call centres – known as inbound call centres – handle only incoming calls and specialise in providing information or services to customers. Customer service calls may involve customers calling to ask a question, requesting help with a problem, complaining about a product or service, or asking for technical assistance. The kind of call depends on the purpose of the call centre.

Outbound calls

Some call centres handle only outgoing calls. These types of calls involve activities such as market research, selling, surveying customer satisfaction levels or soliciting for donations. Just as with incoming calls, the types of calls depend on the purpose of the call centre.

Part B

Read the case study, then answer the questions that follow.

Case study

Lauren has recently commenced work as a receptionist for a small hotel. Her duties include word-processing tasks, such as formatting letters and short reports. Lauren has been asked to prepare the minutes of the managers' meeting. Actions that each manager has agreed to and due dates for their completion need to be highlighted and summarised. Lauren has been asked to complete the final document by the end of the day and distribute it to the managers. There is a shared network system that all managers and Lauren have access to.

1. What type of layout should Lauren use to prepare the minutes? What can she do to ensure that it is consistent with the layout of previous minutes?

2. What should Lauren do to proofread and check the final document?

3. What is Lauren's deadline for completing the task? Are there any additional instructions for her to follow to complete it?

4. Where should Lauren save the document? What should she name it so it is easy to access?

Part C

1. What does editing a document mean?

2. What does proofreading a document mean?

3. When checking for accuracy, what are **three** details you might need to check?

4. Why is a consistent layout important?

5. In a workplace, why is it necessary to follow instructions and time lines?

6. If you need to print only page 2 of a four-page document, how would you do this?

Part C

7. If you need to print multiple copies of a document, how would you do this?

8. Why do you need to follow organisational requirements when saving and naming files?

9. If you sent a sales letter to Ms Ha Nguyen (customer no. 33487), what would be an appropriate file name?

10. How do you exit Word safely (without losing data)?

Part D

Read the case study, then answer the questions that follow.

Case study

Mae works as a customer service representative for a large telecommunications business. She regularly deals with both internal and external stakeholders, and is required to produce documents giving product descriptions and prices of new products.

Mae is an efficient worker and has always been able to produce the required documents well in advance of the deadline. Because of this, her clients expect that they will receive the information before the final date.

With the introduction of new technology to the business, many new products have become available. This has increased Mae's current workload and she is finding it difficult to meet the standard time lines for sending out the required information.

1. Who should she discuss this situation with?

2. How can Mae ensure she meets deadlines?

3. If Mae misses the deadline and doesn't discuss it with anyone, how do you think the clients will react?