BSBITU313
Design and produce digital text documents

Release 1

Learner guide

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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 *BSBITU313 Design and 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 and interprets textual information from a range of sources to determine and adhere to requirements
Writing	• Develops documents using required format, accurate spelling and grammar and terminology specific to requirements • Organises content to support purpose and audience of material using clear and logical language
Oral communication	• Uses specific and direct language, and listening and questioning techniques to clarify requirements
Navigate the world of work	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	• Collaborates with others to achieve joint outcomes
Get the work done	• Uses advanced features within digital applications to address routine and complex work tasks

Topic 1
Prepare to produce documents

Careful preparation is integral to the level of success of any activity. Planning, research and gathering tools together will ensure a timely and successful outcome.

Preparation begins with a safe work environment and knowledge of good work practices. This involves identifying and clarifying the purpose, audience and presentation requirements of a document to ensure consistency of style and language.

In this topic you will learn how to:

1A   Use safe and efficient work practices

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

1C   Ensure consistency of style and language

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 minimise waste. 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 and follow conservation efforts made by your organisation.

Health and 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 the workplace
- consulting workers and encouraging them to maintain health and safety
- providing rehabilitation and 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 health and safety 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 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 employer and workers to address the risks associated with hazardous manual tasks in the workplace.

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).

Health and safety regulations and the Code of Practice for Hazardous Manual Tasks outline specific requirements for hazardous manual tasks that must be addressed, including:

- identifying hazardous manual tasks
- assessing the risks
- controlling the risks
- reviewing 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
> - 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 suddenly move or change position.

> **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.

> **Workstation safety procedure/checklist:**
>
> - Ensure your seat is positioned in front of your computer and that you can reach your keyboard comfortably.
> - Position the monitor out of direct sunlight and at the correct height.
> - Ensure the environment is dust-free as dust can affect the monitor or the computer's central processing unit (CPU).
> - Ensure cables are secured so no one trips over them.
> - Use blinds and window coverings to reduce glare and heat at your workstation.
> - Ensure temperatures do not exceed 26°C and that humidity is between 40 and 60 per cent.

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. They 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 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 2cm 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 when positioning your screen, such as reflection, glare and shadow. 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

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.

Angle boards

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.

Headsets

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.

Footrests

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.

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 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 suit 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 alone. 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. 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.

Managing 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 road works
- 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.

Monitoring and adjusting 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, such as working with documents on-screen or scanning to an email
- 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:

- providing training programs on smart energy practices so that employees can 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 when not in use.

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 of a document

Every organisation has an image it wishes to present to the public. A document can provide an opportunity for an organisation to promote itself.

Therefore, it is essential that the choice of document, as well as its presentation and content, represents the organisation in the best possible way.

When designing and producing text documents, it is important to ensure they reflect your organisation's corporate image and style. Your organisation should have a style guide you can refer to for instructions on format and final presentation. You will need to clarify task requirements so you can produce the most appropriate document. Knowing where to locate information about document design and structure and how to apply the information is a fundamental skill you will need every day in your job.

Communication with colleagues is also essential. When tasks are shared and you contribute to a common outcome, the way you communicate with your colleagues and interpret their instructions is critical.

Points to determine before proceeding when creating a document:

- Is this information for internal or external distribution?
- Is a letter or memo the best way to distribute this information?
- What is the most efficient way of distributing this information?
- What document format would present the required message to the best advantage?

Identify a document's purpose

The style and type of document you need to create will be determined by its purpose, such as an agenda for a meeting or information for clients about organisational news and events.

Always clarify the purpose of the document because this 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 fact-check information from colleagues before putting the document together.

The purpose could be to convey:

- new products
- public holiday arrangements
- sales or special events
- notices to other organisations
- new policies
- financial information
- your organisation's annual activity
- new or updated legislation.

Identify a document's audience

A document's purpose and presentation is influenced by its target audience.

Consider the information needs of the audience and how detailed the information should be. For example, an internal document may be less formal than an external document; alternatively, a formal style may be appropriate for managers and a less complicated style for customers.

Discussion about the document's purpose, appearance, target audience, other users and organisational standards is important as it offers the document designer a vision of what is required. No matter who the audience is, a general rule would be to make sure the document is succinct with enough detail to meet the brief.

Audiences may be:

- clients
- staff
- customers
- business associates
- suppliers
- colleagues
- industry organisations.

Identify the presentation requirements for a document

Once the document's purpose has been established and the audience defined, you will need to decide what type of document is required and how it should be presented.

Most organisations have developed policies and procedures for how they would like 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.

Digital documents used by organisations include:

- memos sharing information
- agendas and minutes for meetings
- annual reports or research reports
- promotional material, including flyers, brochures and calendars
- simple or multi-page letters
- briefing papers
- letters to customers or clients
- mail-merge documents, such as labels, reports, schedules and tables
- envelopes with addresses
- presentation slides.

Letters

Letters are a common communication tool used to pass on a wide range of information.

Letters are often used as a formal method of contacting customers or other businesses. A well-written letter will give a professional impression of the organisation.

Some common types of letters are provided below.

Acknowledgments

For example, to confirm that your organisation has received something, or to acknowledge a job application.

Complaints and claims

For example, to inform a supplier they have delivered faulty goods.

Adjustments

For example, a reply to a customer who has complained to let them know their problem has been resolved.

Covering letters

For example, to accompany what is being sent in a parcel of goods, or as an attachment to a document.

Follow-up letters

For example, to confirm something that has been agreed to verbally.

Inquiries

For example, for information about who will be at a meeting, or to find out the availability of a conference centre.

Requests

For example, for quotations for a service, or to ascertain prices.

Letters

The structure of business letters

Business letters often follow a definitive style, which you may need to be familiar with.

Most organisations use what is called a fully blocked layout. This has the entire letter (including the address) aligned on the left side and has single spacing between lines and a double space between paragraphs. Sometimes the punctuation is open, which means there is no punctuation outside the wording (body) of the letter itself. Some organisations use a mixed punctuation style, which means they place a comma after the greeting and the close.

Business letters will typically display the following elements.

Date

The convention in Australia is to write the day, month and year; for example, 12 May 2018.

Sender's address

The address of the business is usually displayed, which may be part of the company letterhead.

Name, title and address of the recipient

If you do not know the person's title, you should try to find out. If you are unsure how a woman prefers to be addressed, use Ms.

Greeting

Sometimes called the salutation. This is usually 'Dear' followed by the same title and surname as used in the inside address. If you do not know the recipient's name or gender, you can use 'Dear Sir/Madam'.

Body

This is the main content of the letter.

Closing

In a business letter the formal closing is 'Yours sincerely' if you know the name of the person you are writing to, or 'Yours faithfully' if you do not.

Signature and identification

This is usually six lines below the close. After the signature is the sender's name and position in the organisation (the position is usually in bold).

Here is an example of a business letter

Organisation's letterhead →

JC Jackson Photography

"Capturing moments for eternity"

Shop 21, Fairholme Plaza
MAROOCHYDORE
QLD R558

Ph: 07 5443 4237

Email: inquiries@
jcjackson.net.au

Web: www.jcjackson.net.au

Date → 20 May 2018

Recipient's name and address →

Mr Donald Turner
Queensland Business Awards
21 Stephens Street
Chernside QLD 4032

Greeting → Dear Mr Turner,

Thank you for the opportunity to submit the quotation for the provision of photographic services for the Queensland Business Awards.

Body (content) →

The quotation includes a breakdown of prices for services as discussed at our meeting last week. Separate charges are included for the following:

• hourly charge for photographer
• proofs
• individual reprints
• bulk reprints
• enlargements.

If you require any additional information, please do not hesitate to contact me. I look forward to speaking with you soon.

Closing → Yours sincerely,

Signature → *Joshua Jackson*

Manager

Memos

A memo is an internal document that is sent to staff in an organisation.

Memos can be sent to one person or several people. Memos should contain the following information:

- memo header
- date
- recipients
- sender's name
- subject
- main body
- signature.

Promotional materials

Promotional materials are used to promote an organisation and its products and services.

These include flyers, brochures, invitations, business cards and price lists.

Information that may be printed on promotional materials includes:

- an organisation's name
- logo
- telephone number
- street or postal address
- email address
- website.

Here is some information on the different types of promotional materials.

Flyers	
	A flyer is a piece of paper distributed to a wide audience to advertise an event, product or service. An organisation may produce a flyer to post to clients to inform them of a special offer, or to let staff know about an upcoming event. The purpose of a flyer is to attract people's attention and interest them in the flyer's subject.

Brochures	
	A brochure is a piece of promotional material distributed by an organisation to provide information about its products and services. Brochures may also offer in-depth information about a specific product or range of products. Brochures can be one page or multiple pages and are often printed in colour with a glossy finish.

Forms and tables

Forms are used by organisations to record and collect information. Forms can be one page or multiple pages and can be created to meet any need. Common forms include customer feedback forms, order forms and time sheets. Word-processing software has a range of features you can use to create forms, but one of the more popular methods is to use a table or a series of tables.

Here is an example of a tri-fold brochure.

When you create tri-fold brochures you need to lay it out from back to front so that when it is printed double-sided the content is displayed correctly. If you open a brochure template in Word, you will see this is how it is laid out.

Here is an example of a customer order form. Four tables were used to create this form.

Creating a form

Tables allow information to be displayed or collected in a clearly defined space.

When using tables to display data, the use of headings for the rows or columns makes it easy for the reader to understand the data.

Have you ever tried to fill in a form where the lines were too close together and the spaces provided were insufficient for the required responses? This is something you must be aware of when creating tables to fulfil that function.

The table below demonstrates how effective tables can be for presenting and clarifying data.

Number of passenger vehicle registrations		
Year	Victoria	New South Wales
2013	3,446,548	3,877,515
2017	3,750,484	4,217,400
2018	3,838,133	4,277,481

Imagine if the information was presented in sentence form. This is exactly the same information, but is much harder to interpret:

Victoria had 3,446,548 new vehicle registrations in 2013, 3,750,484 in 2017 and 3,838,133 in 2018, while New South Wales had 3,877,515 in 2013, 4,217,400 in 2017 and 4,277,481 in 2018.

Reports

A report is a formal document that may be used for a range of purposes.

A report may be written about the progress of an existing project, to detail 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 a lot of information that may need to be collected from multiple people within or outside of an organisation. For example, the progress of multiple teams may need to be compiled in a single report.

Formal reports

A variety of formal reports are produced by large organisations. These include annual reports, financial reports, feasibility reports and project reports. Formal reports can be hundreds of pages long and often use complex numbering systems so that people reading the report can easily locate information.

The structure of formal reports usually includes the following elements:

- Title page
- Table of contents
- List of tables or graphs
- Summary of key points (executive summary)
- Introduction
- Main text (containing data, findings, etc.)
- List of recommendations
- Conclusion
- References and acknowledgements
- Appendices

Short reports

Short reports are less formal in structure and usually one to three pages in length. The structure will be customised to suit the data being presented and the audience. Examples of short reports include the results of a review of customer service standards, recommendations for a change of stationery supplier or purchase of an item, or a progress report on arrangements for a function you are organising.

The structure of a short report is usually as follows:

- Introduction

- Main text (containing data, options, findings, etc.)

- Recommendations and conclusion

Due to the short length of these reports there is usually no cover page or table of contents as the headings provide the overall structure.

Here is an example of a one-page report recommending the purchase of a new printer.

Techno Train
Making sense of technology

Laser Printer Purchase

Laser Printer Purchase

Current situation

The bubble jet printer in the accounting department has been out of order three times in the last five weeks. It is constantly experiencing paper jams. Each time, the printer has had to be sent away for repairs and team members have had to make alternative arrangements in order to print their reports and documents. To minimise interruptions to others, most staff have been printing to the copy centre in the reception area, which means that they need to walk quite some distance to collect documents.

The current printer was purchased in February 2011 and has had constant use during the last five years. There is no warranty remaining on the machine. A new printer needs to be sourced.

Options

Quotes were provided by two suppliers, Office World and Technology Express. Each quoted on three printers from the low-volume laser printer range. The table below shows the details of each printer.

	Electro PNC1244 Laser Printer	Lockwood ENZ200 Laser Printer	Brownly HD2108 Laser Printer
Supplier	Office World	Technology Express	Office World
Price	$299	$386	$345
Warranty	12 months	12 months	24 months
Toner refill price	$55	$52	$60
Colour	Yes	No	No
Print speed	14ppm	21ppm	18ppm
Resolution	600dpi	2400dpi	1800dpi
Paper tray capacity	250 sheets	175 sheets	250 sheets
Dimensions	370W x 251D x 215H mm	371W x 361D x 165H mm	370W x 300D x 245H mm
Weight	5300 g	6500 g	6300 g

Only one printer offers colour, but this is not a high priority as the department mainly prints spreadsheets that do not use colour. Prices for consumables are similar for all models as is the size of the machines. Two machines have a 250-sheet paper tray capacity, which is an advantage.

Recommendation

Due to the mounting cost of repairs and current cheap prices of these printers, I recommend the purchase of the Brownly HD2108 Laser Printer, which has several advantages including a 24-month warranty, its mid-range price, large paper-tray capacity and fast print speed. Office World had the most competitive price and this model is currently in stock.

Attachments

- Quotes
- Brochures on each model

Report prepared by:	Sasha Turner	Signature: _____
Date:	6 July 2016	

Page 1 of 1

Schedules

A schedule is a list or plan that shows the order in which a number of events will take place.

Schedules can also be used to list tasks that need to be completed. Commonly used schedules include itineraries, appointment diaries and timetables.

The following is an example of an itinerary for internal staff distribution.

Calendars

Calendars are used to give an overview of events, appointments and meetings over a period of time.

Calendars can also be used by organisations for booking resources, such as a meeting room, or for recording information, such as when staff will be on annual leave.

The following is an example of a calendar showing workshop dates. This calendar is to be distributed to the company's external clients; therefore, the company logo, phone number, email address and website are also displayed.

Techno Train	Training Calendar June 2018					
Sun	Mon	Tue	Wed	Thur	Fri	Sat
					1 Intro Internet/ Email Workshop 9am–12pm	2
3	4 Training Centre Open Day 9am–12pm	5	6 Microsoft Word Workshop 9am–4pm	7	8	9
10	11	12	13	14	15 Adv Internet/ Email Workshop 9am–12pm	16
17	18	19	20	21 Web Page Design Workshop (Day1) 9am–4pm	22 Web Page Design Workshop (Day2) 9am–4pm	23
24	25	26	27	28	29	30
For more information contact Techno Train **Phone:** 07 3867 1333 **Email:** info@technotrain.com.au **Web:** technotrain.com.au						

Mail merge

Mail merges can be used to customise documents including letters, labels, envelopes, flyers and statements. They are especially useful when sending a mail-out to many recipients.

A mail merge is performed by combining the contents of two documents or files – one that contains the information you are sendng and one that contains the details of the recipients (data source). The two files can be in the same program or in different ones. For example, the data source may be in Microsoft Excel and the mail merge may be done using Word.

Below is a sample of some labels generated using mail merge in Microsoft Word.

Alex Barney & Co 21 Ergett Street IPSWICH QLD 4305	We Care Pharmacy PO Box 38 CHERMSIDE QLD 4032
Ableton Accountants PO Box 23 CHERMSIDE QLD 4032	Daleys Fresh Fruit 98 Berwick Street DECEPTION BAY QLD 4508

Practice task 2

Question 1

Explain the purpose, audience and presentation of the required document in the following situations:

a. The advertising department requires a new price list.

b. The payroll department wishes to have new PAYG information distributed.

c. The purchasing department wishes to advise that a product is no longer available.

d. The health and safety committee is having a meeting and asks for agenda items.

e. The company is moving to a new premises.

Question 2

Why would it be inappropriate for a staff member's work-related travel schedule to be circulated outside an organisation?

1C | Ensure consistency of style and language

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

You will need to become familiar with your organisation's word-processing software to produce documents. This can be used to design and lay out documents so that any documents you produce adhere to the corporate image of the organisation and the organisational style.

Organisational style guides

Every organisation has different document requirements, particularly in terms of layout and presentation. These are usually outlined in a style guide.

As part of your induction, you may be shown where to access the organisation's style guide or policies and procedures. If you are unsure, ask your supervisor where these documents are and how to access document templates.

If your organisation does not have a formal style guide, you could locate examples of documents that have previously been created in the organisation and follow them. For example, locate last year's annual report and use it as a guide. Show your supervisor the document you are planning to follow so you know you have the right type of document and style. You could also ask your supervisor if they would like you to create a style guide and templates for everyone to use.

Word-processing applications

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

The type of business will determine the type of application that is used across the organisation as well as the resources available to it to purchase, update and maintain the software. Find out which one is used in your organisation before beginning your document.

There is a lot of overlap between different word-processing applications, and one is not necessarily better than the other.

The following outlines the strengths and limitations of various word-processing applications.

Software application	Strengths	Limitations
Microsoft Word One of the most common word-processing applications, Microsoft Word is widely used by homes and businesses.	• Instant spellcheck for grammar and spelling • Templates for new documents • Track changes function, enabling users to see edits that have been made • Bullets and numbering are done automatically • Technical support and training widely available on the internet • File protection can be used to prevent users from altering any part of the document	• Restrictions on the size of the file Word can open (must be under 512 MB) • The auto-correct and auto-formatting features will override inputting • Incompatibility with older versions of Word or different software • Many options which some people find complicated • Targeted by viruses and malware due to its popularity, requiring virus protection software when sharing files over networks
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 • Multiple style and formatting options • Suggests edits • Displays action items to show which user is responsible for which task	• No Google equivalents for the more advanced Office programs, such as Publisher, Access or Visio • Unable to link directly to Outlook data to perform a mail merge or read information in a calendar
Apache OpenOffice Writer OpenOffice Writer is an open-source word-processing application. This means it is free and that anyone is able to change the software to suit their needs.	• Commands and functions in one component of the software work throughout the entire suite • Compatible with PDF, Flash and other files for direct export • Many style and formatting options • Variety of templates and extensions available	• The primary document format supported by the software is the ODF format, not the commonly used DOC format • No publisher program

Software application	Strengths	Limitations
Corel WordPerfect This is one of the oldest word-processing programs still in existence, with the original release dating back to 1979. Popular with the legal profession with options for numbering, redaction and a pleading editor.	• Many style and formatting options and keyboarding shortcuts • Headers and footers are easy to manipulate, and page numbering is independent of footers • Format converts to other file types such as PDF	• Adds to support and training overhead as staff will likely need support • Reveal codes are designed for users familiar with software coding, a concept which many may not be familiar with • Converting regularly between WordPerfect files and other formats increases the risk of file corruption
Microsoft Publisher This is a desktop publishing application suitable for documents that emphasise layout and design, such as brochures, flyers and posters.	• Many style and formatting options, design tools and picture editing tools • Templates reduce time and workload and make it easy to add text, images and make changes • Comes with a large amount of stock art	• Creates a larger file format • Difficult to view edits by various people • Relies on template design, which often ends up being generic
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.	• Extensive style and formatting options • Advanced design and layout tools • Multiple keyboard shortcuts • Picture editing tools • Can be integrated with other Adobe products, such as Photoshop	• Requires a lot of RAM to operate • Features can take a long time to load • Files are generally quite large, making them difficult to share

Why organisational requirements are important

One important factor of production guidelines is to ensure that the time lines required for a project or task are met.

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. The time line needs to allow enough time to complete the task, edit and review the document. Your supervisor will often provide a due date or deadline, but it will be your job to monitor and report on your progress.

You must also ensure that documents have a consistent style and image so that customers, business associates and anyone receiving material from your organisation will instantly recognise it as belonging to your organisation.

Clients and customers will form an opinion of an organisation based on the documents they receive. In some instances, a document that looks unprofessional or contains errors can be the difference between gaining and losing a client.

Many organisations have policies and procedures for staff to follow, including style guides and templates for producing documents. In larger organisations and government departments, style requirements are usually clearly defined, while smaller organisations often have no formal documented style guide and staff are expected to follow examples of documents previously produced.

Conforming to organisational requirements will ensure you are able to complete your work in an efficient and timely manner. It is very frustrating to have spent hours working on the design of a document, only to find it does not meet requirements.

Common organisational requirements

Every organisation has different requirements for business documents.

Most important is to present an appropriate and consistent corporate image by using the organisation's logo, colour scheme and style.

Make sure you know where these instructions are kept and that you are familiar with them.

What is required or appropriate for one organisation may not suit another; for example, a law firm's requirements would be different from that of a sports equipment retailer.

To prepare appropriate documents for your organisation, you must follow established guidelines and procedures for production.

Established guidelines and production procedures may include:

- adhering to content restrictions
- using templates
- following the organisation's style guide
- including key details in the header and footer, such as the date, the organisation's name and the document title
- observing copyright requirements
- delivering the content in the designated timeline.

Presenting a consistent corporate image

A corporate image for documents can be compared to a staff uniform.

Many documents can wear this uniform, including correspondence, forms, emails, memos, websites, invoices, statements and reports. Just like staff in a company, this uniform may vary; for example, managers often wear a different company shirt or uniform to other employees. Documents can also incorporate different parts of the company's image into their design.

A corporate image has several components, including:

- logo
- colour scheme
- house styles and templates.

Consistent use of the same colours, logos and designs ensures that documents are easily recognised as belonging to your organisation.

Organisational style guides

Style guides are used to ensure consistency in the presentation and final look of the documents produced by an organisation.

This may include using standard templates or using the corporate letterhead for certain types of documents that have a similar style and format. Clarify the use of style guides for your organisation with your supervisor and colleagues.

Style guides vary between organisations. They often provide information on the desired writing style and specify the preferred formatting of text and pages with specific layouts and designs of a variety 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 and what information they must contain
- document reference details, such as a list of resources referred to in a report
- signature blocks and document sign-off
- use of company logos and slogans, and where they must be located.

Below are some styles relevant to writing style and formatting.

Writing style

- The use of abbreviations
- Preferred spelling of particular words
- Use of hyphens
- Use of capitals
- Use of full stops

Text and page formatting

- Font size and type
- Margins
- Indenting
- Bullets and numbering
- Headers and footers
- Borders

The following is an example of some things that might be included in a style guide.

Dates

The date must be included in the upper right of the document in the following format: Day Month Year.

Legislation

When referring to an Act of parliament, if the date follows the Act, the Act must be written in italics. If there is no date, italics are not necessary; for example:

Copyright Act 1968 (Cth)

The Privacy Act

Spelling and hyphenation

C

checklist

check-up

Commonwealth

coordinate

cost-efficient

Font

Arial 12pt must be used for the body text of a standard letter.

Layout

The left margin must be indented at 4cm.

Headers

File reference details must be provided at the top of each page in italics.

There may also be protocols for naming and saving files and folders in specific locations.

Disclaimers

A disclaimer is a notice placed at the end of a document or email to reduce the risk of legal liability.

Disclaimers are generally used when information may be misinterpreted or misused, or if confidential information may be distributed to the wrong person.

The style guide may include information of when and where disclaimers must be used, such as at the bottom of all emails that are sent.

An email disclaimer may look similar to the following:

This email is intended for the use of the addressee only and may contain confidential information. If you are not the intended recipient, you are hereby notified that any use or dissemination of this communication is strictly prohibited. The sender disclaims liability for any errors, omissions, viruses, loss and/or damages arising from using, opening or transmitting this email. If you received this transmission in error, please notify JC Jackson Photography immediately on (07) 5443 4237, then delete this email.

Templates

Templates are used to establish a consistent style and layout for particular documents.

Templates define the preferred layout and text formatting for documents, ensuring consistency in design. Most organisations have templates for letters, faxes, memos, minutes and agendas. They may also have templates for reports, flyers and brochures.

The advantages of templates are shown here.

Consistency

Using templates ensures that information is always presented in the same manner, making it easier for readers to locate important information. An example of a common template is the layout of a monthly bank statement. Because the information is always presented in the same format, the reader knows where to find the various transaction details.

Saved formatting

Templates can be as simple or as complicated as required, and may include pre-formatted margins, fonts, columns, headers and footers, logos, colours and styles.

Template integrity

Because templates are used by various staff members, organisations must ensure that no changes are accidentally made to them. For this reason templates should be saved in a specific location as a special template file type. This ensure that when you open a template document, a new document is created, but the original remains unchanged.

Templates are special files that are not stored with the rest of your documents. This is so Word knows where to find them so they can be accessed when creating a new document. You can see where your templates are being stored by checking the default file locations.

To create a template, select the **File** tab and click **New**. Select **Blank document** and create and format the template you require. Click **File**, **Save As**, then choose **Browse**. In the Save as type box, select **Word Template (*.dotx)**.

Content restrictions

There are some details you are not permitted to give out in written documents.

The kind of information subject to content restrictions depends on the organisation, and may include results of investigations, financial data or employee details.

Content restrictions can also be applied to the way an organisation words its documents to ensure information is not misinterpreted or acted on without professional advice being sought. For example, a financial planning firm that recommends a particular share purchase in its monthly bulletin may include a line that says: 'Please consult your financial adviser before acting on any of the information received in this bulletin'.

When creating documents, check with your supervisor to ensure you are following your organisation's guidelines regarding restricted content.

Copyright legislation

Copyright ensures that content, including text and images, is not copied from another source without receiving permission or acknowledging the original author.

The *Copyright Act 1968* (Cth) sets out copyright legal obligations in Australia. To avoid breaching copyright law, always record the details of any images or text you are borrowing from another source and reference them appropriately (including the author and original source).

Details about appropriate referencing methods can generally be found in an organisation's style guide. Alternatively, ask a colleague or supervisor if you are unsure.

For more information on copyright, visit the Australian Copyright Council's website at: http://aspirelr.link/australian-copyright-council

Determining task requirements

It is important to accurately determine the tasks you need to perform when preparing a document.

The more organised and efficient you are, the easier it will be to produce a well-designed document that conforms to your organisation's requirements and meets audience expectations.

For example, you need to identify whether you are required to follow an existing template or design the document yourself.

If you are designing the document you may need to identify whether:

- you are required to include the company logo and, if so, where
- there is a standard font to use
- you are using the recommended language style; for example, not too much jargon and a suitable tone, such as friendly or formal
- there are budget constraints (e.g. you might design a great two-page brochure, but the budget may only be for one page).

Here are some things you may need to confirm before beginning your task so that there is consistency of style for the document you are producing.

Letters	You need to check whether attachments or enclosures are necessary, such as references, cheques or brochures. Check your organisation's style guide regarding the type of paper to use, such as letterhead paper with the company's name, address and phone number. The page number and total number of pages are usually shown in the footer on each page. For example, Page 1 of 3 may be shown on the first page of a three-page letter. You should treat mail merge labels like any other document, applying styles and formatting according to your organisation's guidelines.
Forms and templates	You will need to use your design skills for forms and tables. You may need to determine if they will be in colour or black and white, the paper size they will be printed on and what information must be included. The information to be included may depend on whether the form is for internal company use or external (client) use. Check your organisation's style guide and templates. You may also ask your supervisor to review your design.
Reports	You need to undertake a variety of tasks when preparing a report. For example, you may need to determine the complexity of the report, including its length, structure and the level of detail needed to suit the purpose and audience. See your organisation's style guide or templates for the preferred layout.
Schedules	As schedules may be distributed either within an organisation or to external clients, make sure you follow the guidelines in your organisation's style guide and templates, and get your supervisor's approval for the final document and distribution.

Flyers and brocures	Before you can produce the flyer or brochure, you need to know if it will be in colour or black and white, the paper size it will be printed on and what information must be included. Information that will usually be printed on a flyer or brochure includes the company name, logo and phone number, although other details may need to be included. Check your organisation's style guide and templates, and always ask another person to review your design and finished flyer or brochure.
Calendars	Calendars are usually generated for the month, but can be customised to any length. You can create a calendar using word-processing or desktop publishing software. Like schedules, calendars can be distributed to internal or external clients. To ensure you uphold the required corporate image, follow the guidelines in your organisation's style guide and templates, and get your supervisor's approval for the final document.

Practice task 3

Imagine you work for JC Jackson Photography. You have been asked to create a flyer advertising a special offer on reprints, which includes a free gift.

Question 1

If you were unsure of the requirements of the task, what would be **two** things you could do to ensure you have all the information you need?

Question 2

List **three** things that must be included in the document.

Question 3

Write **three** questions you would ask your supervisor to clarify the task requirements.

Question 4

Which word-processing application would be suitable to produce this flyer?

Question 5

Give **three** examples of the types of information you may find in your organisation's style guide.

Question 6

What is the main purpose of using a style guide?

Summary

- Ergonomics is about creating comfortable working conditions and setting up a workstation to suit your physical requirements, which can prevent undue stress and strains.

- Performing exercises during the day can reduce pain and discomfort.

- Use equipment to improve your posture and be aware of environmental factors in the workplace – such as lighting, noise and air quality – that may affect your health.

- Plan daily tasks to prevent repetitive work being done for long periods of time.

- Conserving resources at work benefits the organisation by reducing costs and benefits the planet by reducing greenhouse gases and the amount of waste sent to landfill.

- Documents produced by an organisation include letters, memos, promotional materials, reports, forms, calendars and schedules.

- Always clarify the task requirements before producing your document to ensure you create the right document type and use the appropriate style and design.

- Organisational requirements ensure all documents produced are consistent in style and layout.

- Try to use the best word-processing application for the task.

- Ensure you present a consistent corporate image.

- Always follow style guides and templates where relevant.

- Adhere to content restrictions, such as keeping private information confidential.

- Observe copyright legislation by seeking permission to reproduce content.

Learning checkpoint 1
Prepare to produce documents

Part A

1. Give **two** examples of how environmental factors such as noise, light and air quality could affect your productivity at work.

2. Give **two** examples of conservation techniques that can be done in an office to conserve paper and/or energy.

3. For each of the following tasks, give an example of the type of document that needs to be produced and why it is the best choice:

   a. Confirming an appointment time

   b. Distributing information to a large number of people regarding a product that is on special

c. Sending a personalised invitation to 50 valued customers to attend a product launch

d. Advising staff in your organisation that a meeting is being held to discuss the new enterprise bargaining agreement that is being negotiated

e. Collecting information from customers regarding the quality of customer service the organisation is providing

f. Advising your supervisor of your research results into which catering company would be most cost-effective for monthly staff meetings

4. Identify **three** features that would need to be considered to present a consistent corporate image.

5. Develop a list of questions you can ask someone to confirm the task requirements for a document you have been asked to produce.

6. You need to send a digital 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

Part B

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

Case study

Angelina works as an administration officer. Her main tasks are reception duties, word-processing, handling the mail and filing documents. Most days Angelina's manager gives her urgent work in the afternoon that needs to be completed that day. Her time lines are always very tight and she often finds that she has to work during her lunch break and for an extra half hour in the evening. She is always exhausted at the end of the day, and is becoming stressed.

Angelina finds that work is often just dropped on her desk, which makes her desk disorganised and difficult to use. She cannot adjust her chair and there is glare coming from her monitor. She often leaves work with a headache and a backache.

1. Identify **three** unsafe work practices Angelina experiences.

2. For each of the unsafe practices you have listed, describe a solution.

3. Explain why work organisation and ergonomics leads to better health of employees.

Topic 2
Design word-processed documents

One of your main duties when working in an office may be to create and edit digital documents.

Various factors influence the structure and layout of a document. You should clarify each of these points before starting the design of your document.

You also need to consider the purpose of the document and the information that must be included, as well as who is going to be using it.

The language style should be suitable for the audience. For example, if you are developing a document for clients who are not familiar with the subject matter, you may need to include a glossary that explains the technical terms you have used.

A document's audience also influences its design, including the choice of fonts, graphics and layout of the information. For example, for a formal report, you could use photographs, diagrams and tables to present data and information.

In this topic you will become familiar with the various information requirements and design elements that must be considered, along with the functions you can use to ensure consistency in your documents.

In this topic, you will learn how to:

2A Design the structure and layout of a document
2B Insert tables, images and charts

2A | Design the structure and layout of a document

Designing a document refers to the way you structure and lay out the content, which will be determined by the information it needs to contain and the target audience.

You need to consider the type of information and the clearest way to display it. For example, is the information best communicated in graphs or text? Would you use bullets, tables or columns?

Design aspects to consider include:

- breakout boxes
- colour
- columns
- graphics, photos and drawings
- headings
- letter and memo conventions
- page layout
- white space
- typeface.

Breakout boxes

Breakout boxes can be used to give clearly defined borders or edges to content on a page.

Putting an item in a box can make it stand out. Using design elements such as boxes consistently on a range of documents can help the audience to quickly locate information they have a particular interest in. An example of this is displaying small ads in a newsletter. If you use the same positioning and boxed design in each edition, readers will learn to look for the information in that format.

The following are two designs for a flyer. You can see how the boxes in the example on the right grab the reader's attention.

Packers Carpets and Mats

Shop 1, 152 Goss Road, CALOUNDRA QLD 4551
Ph: 07 5467 4523 Fax: 07 5467 5422

Web: www.carpetandmats.com.au

June specials

ON SALE 1–30 JUNE

With the weather cooling down, now is the time to install carpet from our modern easy-care range. Modern carpets keep your family warm and cosy in winter and cool in summer.

Easywear carpet

For: High traffic areas

Colours: Grey, Bone, Olive

Price: $48/sq m

Stain Resist Carpet

For: Lounge and dining rooms

Colours: Buff, Stone, Green

Price $76/sq m

Lush Pile Carpet

For: Bedrooms

Colours: Marble, Grape, Citrus, Honeysuckle

Price $105/sq m

Indoor/Outdoor Carpet

For: Use in enclosed outdoor living areas

Colours: Green, Red, Brown, Black, Grey, Stone

Price $36/sq m

Hallway Runners

Back by popular demand

Large range of colours and styles

From $8 per metre

Hurry in! Available only while stocks last!

Packers Carpets and Mats

Shop 1, 152 Goss Road, CALOUNDRA QLD 4551
Ph: 07 5467 4523 Fax: 07 5467 5422

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June specials

ON SALE 1–30 JUNE

With the weather cooling down, now is the time to install carpet from our modern easy-care range. Modern carpets keep your family warm and cosy in winter and cool in summer.

EASYWEAR CARPET

For high traffic areas

Colours: Grey, Bone, Olive

Price: $48/sq m

STAIN RESIST CARPET

For lounge and dining rooms

Colours: Buff, Stone, Green

Price: $76/sq m

LUSH PILE CARPET

For bedrooms

Colours: Marble, Grape, Citrus

Price $105/sq m

INDOOR/OUTDOOR CARPET

For use in enclosed outdoor living areas

Colours: Green, Red, Brown, Black

Price $36/sq m

HALLWAY RUNNERS

Large range of colours and styles

Starting price: $8 per metre

BATH MATS

New season colours and novelty range

Starting price: $12 each

Hurry in! Available only while stocks last!

Colour

The use of colour in documents can be valuable, both for presenting a consistent corporate image and for making items stand out.

When one section of a document is in colour and the remainder is in black and white, the reader's eye is automatically drawn to the coloured section.

You may also need to consider the colour of the paper you will be printing your document on, as some fonts and graphics may not be easy to see on coloured paper; for example, black print can sometimes be hard to read on dark red or navy blue paper.

Look at newspapers and magazines to find examples of the effective use of colour. Advertisers often pay extra for coloured advertisements to make them stand out.
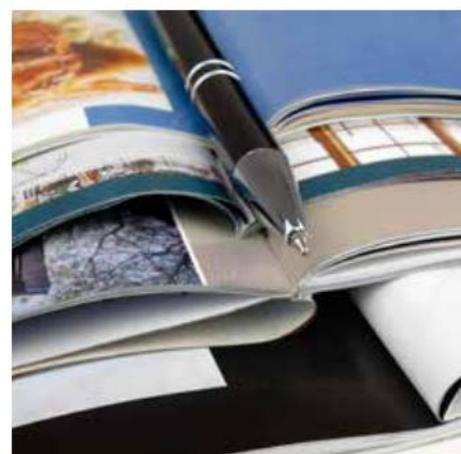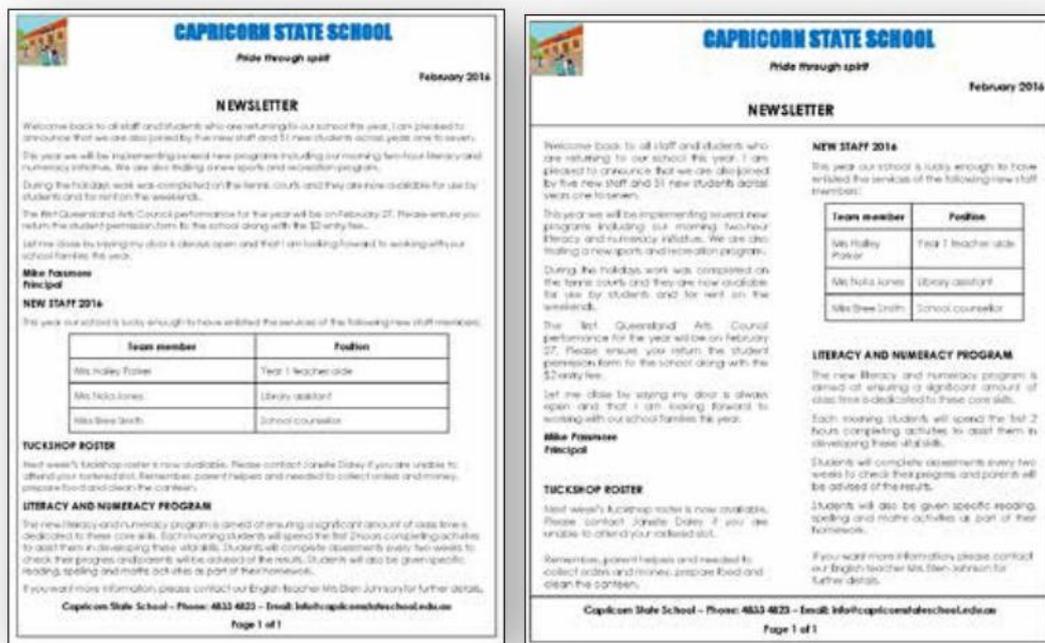
Columns

Columns are a popular design element for forms and newsletters.

In newsletters, columns can be used to create interest and to separate articles. Altering the number of columns can give you more options to insert graphics and tables, allowing you to fully utilise the space.

Look at the first version of the Capricorn State School newsletter. The top article appears to have too much white space or gaps and the information in the second two articles is mixed with the tables. This is not a well-designed document. In the second version of the document, you can see how the use of two columns in the top half of the page fits in the three small articles and makes them easy to read.

Formatting tables

When designing forms, tables are often used to insert rows and columns, which allow for the effective collection of data in the available space.

If any of your tables extend over a single page, you can use the Heading Rows Repeat command to automatically show the table headings on each page.

To do this, create a table and select the row/s that you want repeated at the top of each page. You must include the first row in the table, but can choose additional rows if desired.

Click the **Layout** tab, and then select **Repeat Header Rows**. The rows you selected will now be repeated on each page of the table.

Note: This command only works for automatic page breaks. It will not work if you insert manual page breaks in your table.

Graphics, photos and drawings

Graphics, photos and drawings can be powerful design tools. They can be used to break the monotony of continuous text or to clarify information.

The use of appropriate graphics can help the audience understand the document's contents. An effective use of graphics could be using an eye-catching picture to draw the audience's attention to a flyer, or using the company logo on documents to portray a consistent and professional image to corporate clients.

Graphs and charts can also be used to represent data, as shown in the following example of a sales report. Using this technique is very effective when presenting data to a corporate audience.

JUNE QUARTER PRODUCT SALES REPORT

We are pleased to report that Electronics Warehouse has had an excellent June quarter. Total sales for the period 1 April to 30 June increased by 5% on the March quarter and showed an increase of 12% over the same period last year.

This trend has been driven by the recent reduction in prices of several of our major lines and is shown in the following column chart.

Headings

Headings are a simple but effective way to give a document structure.

They help the reader to pick out the main topics and discussion points or quickly skim the document to get an idea of what they are about to read. Ensure that headings are relevant and concise, and use a consistent font and style throughout the document.

Headings are important when creating long reports because of the amount of information the reader needs to absorb. Eye-catching and descriptive headings on flyers and promotional materials also help to attract the audience's attention.

Page layout

Page layout refers to the way all the different elements on the page come together.

First, you must determine what size your document will be – it could be A4, A5, letter, B5 or a custom size – and how many pages the document will have. If the document is being mass-produced (e.g. flyers and newsletters), the paper size and number of pages will usually be determined by the printing budget, so make sure you are clear on your organisation's requirements before creating the document.

You must make effective use of the space available. Setting appropriate margins for your document will ensure you have the optimum amount of space to work with. When deciding on the layout of a page, you need to assess the importance of each piece of information and make sure the reader's eye is drawn to what is most relevant. Your organisation's style guide will outline any elements of documents that must be included and you will often find these items have standard positions on the page so as to maintain the corporate image. It is good to position these first and then consider the layout of the remaining information.

The following is an example of two versions of a customer satisfaction survey. Both documents include all the necessary information, but only the one on the right has an effective page set-up. The result is a document that is easy to fill in, which means that customers are more likely to take the time to complete the survey.

Improvements in the document on the right compared with the one on the left include:

- a border has been added
- a large, clear heading is used
- plenty of space is allowed for written answers
- question numbers have been added, which will make collation of data easier
- there is effective use of the whole page (no gap left at bottom).

Typeface

Most word-processing software packages provide at least 50 choices of typeface – commonly referred to as fonts.

Some of the better known ones are Times New Roman, Arial, Calibri and Courier. Some fonts can be hard to read and you need to consider this when designing your document. It can also be confusing for the reader if you use a lot of different fonts that don't go well together.

Your selection of font will be influenced by the audience and purpose of the document you're producing. A report with a large amount of text needs to be presented using easy-to-read fonts, such as Times New Roman or Arial. Alternatively, a more casual font may be suitable for an informal invitation.

In the two examples of reports shown below, you can see how the one on the left is far easier to read because it uses consistent fonts for the headings and body text. The Arial font that was selected is easy to read and suitable for a large document. The report on the right has too many different fonts, some of which are hard to read; the reader may not even be sure if all the sections are related.
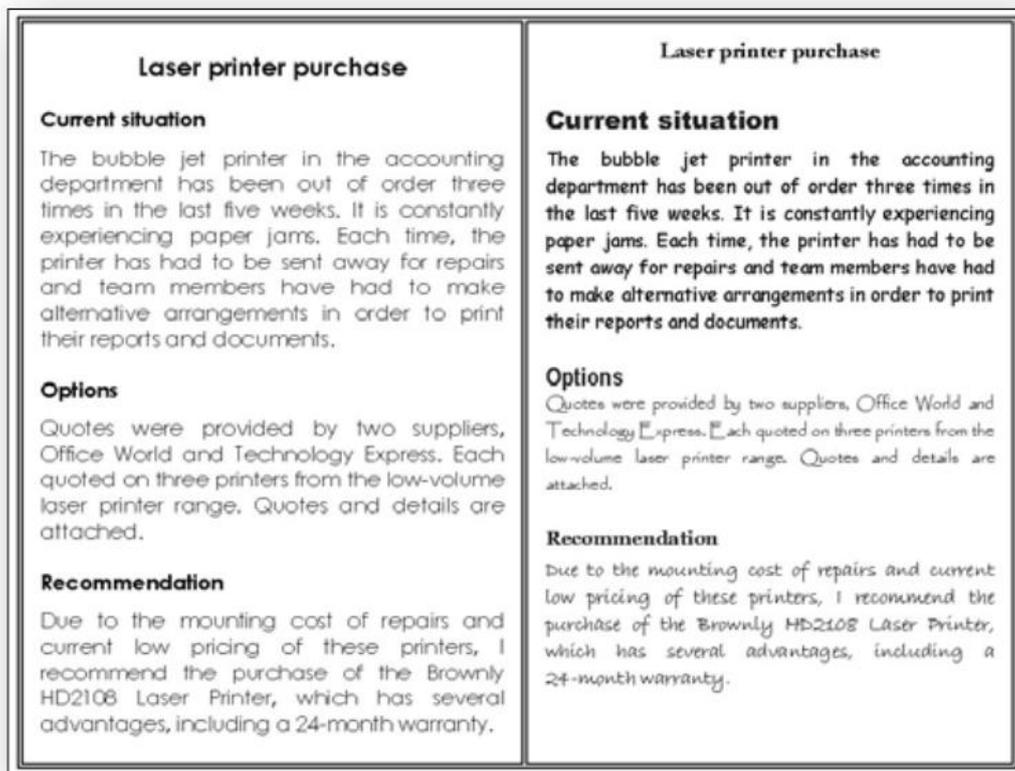
White space

White space refers to the blank space or gaps around parts of a document.

Leaving appropriate amounts of white space around these elements ensures the document does not become too crowded and confusing or that items don't look too isolated and out of place.

It is not essential to fill up every bit of space on the page, but you shouldn't leave a big part of it blank either. Sometimes leaving some space around an item can draw attention to it.

Practice task 4

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

Case study

Jennifer works as an office assistant for a training organisation. Her supervisor assigns her the task of creating a monthly newsletter. She assumes the newsletter is going to be distributed to the organisation's clients. She spends several days working on the newsletter, researching various hints and tips, creating a training calendar and preparing trainer profiles.

She presents her draft newsletter to her supervisor and learns that she was actually meant to create an informal staff newsletter for the organisation's employees. Most of the work she has done was unnecessary.

Question 1

What might the consequences of Jennifer's actions be?

Question 2

Consider an internal memo and a promotional brochure. How would the purpose of each of the following documents affect its design and layout?

a. Internal memo

b. Promotional brochure

Question 3

Complete the table below by describing how each of the following design features can be used.

Design feature	Function
Breakout boxes	
Colour	
Columns	
Graphics, photos and drawings	
Headings	
Typeface	
White space	

Designing the document to enhance readability and appearance

Documents are important communication tools that need to be suitable for the audience and purpose, as well as being visually appealing and easy to read.

When producing digital documents you should spend time working on a design that is readable, eye-catching, and meets task and organisational requirements. Remember that everyone has a different opinion, so don't forget to ask for feedback.

The following design elements are basic guidelines you should follow to ensure the readability of your finished document.

Balance

Balance refers to the way text and graphics are distributed on the page. A document is unbalanced if most of the content is at the top or bottom, left or right of a page. There should also be a balance between the amount of text and graphics on a page so that the page doesn't look overcrowded or dominated by one feature. Distributing the text and graphics throughout the document will help to achieve balance.

Positioning of graphics

When placing headings, body text and graphics on a page you need to ensure that they are positioned so the information is easy to understand. The position of headings and graphics can either help or hinder the reader in understanding a document.

As a general rule, in documents such as reports and newsletters, a graphic should not be directly under a heading as this area is reserved for the introductory paragraph. Graphics should be placed close to the text they relate to.

Simplicity

One way to make text more readable is to use a simple design that is not overcrowded, disjointed or busy. The text should be large enough to read and should flow in a logical manner. Try not to change between single and multiple columns more than once on each page, use borders and boxes sparingly, and stick to one colour scheme. Remember, you don't have to use every feature offered by your software on each page!

Text flow

Text flow refers to the way passages of text are positioned in a document. The way text flows in a document is one of the most critical elements influencing its readability; if text flow is arranged carelessly, the reader can become confused. Text can flow from one column to another or from one page to another. Newsletters, newspapers and magazines regularly have to split articles across columns or pages in order to fit text in, so it is vital to ensure the reader can locate the follow-on text.

When text from a particular article has to flow over more than one page, you may decide to include information that tells the reader where to find the rest of the article. You might add 'continued on page 2' at the bottom of the article, then add 'from page 1' at the top of the article on page 2. Alternatively, you could use an arrow indicating to turn over the page to continue reading.

Typography

Typography refers to the use of various text formatting and font options in the production of documents.

Using effective typography allows you to finetune a document and add the finishing touches. Remember to ensure you are still able to complete your document on time, as some of these design elements can become time-consuming. There is more to using text effectively than just choosing a font type, font size and text alignment – as shown below.

Font	The font you choose can have a huge impact on the amount of space a passage of text uses. Try typing the same line of text in several different fonts and you will notice a difference. For example, look at the different lengths of the sentences below.
	This is a line of text in Times New Roman.
	This is a line of text in Arial.
	`This is a line of text in Courier New.`

Paragraph and line spacing	Another technique you can use to achieve additional emphasis on headings is to adjust the spacing before and after headings and lines of text. To do this, select the paragraph icon, then make adjustments where it says 'Spacing'.

Practice task 5

Your company is hosting its annual end-of-year staff party and you have been asked to design a flyer to advertise the function to staff. Information to be included in the flyer is as follows:

Company name: Pack and Go Express Couriers

Date: 16 December 2018

Time: 5.00 pm until late

Venue: Rush Restaurant and Club

Address: 41 Villa Street, Fremantle

RSVP: 10 December 2018

Dress: Themed party: 80s revival – prize for best dressed

Cost: No charge

Program:

5.00 pm Pre-dinner drinks

6.30 pm Buffet dinner

8.00 pm Awards and speeches

9.00 pm Entertainment – live band

Create the document in Word. Ensure you apply what you have learnt in this topic about document design and layout. Save and print your finished document.

AutoCorrect

You can use a variety of automatic functions to ensure consistency when creating a document.

AutoCorrect is a feature of Word that automatically corrects common typing errors. This is a powerful tool because of the time it saves when proofreading for spelling and grammar errors. Have you ever noticed when typing that an error will automatically correct itself? That's AutoCorrect at work. For example, if you type 'teh', when you hit the space bar it is corrected to read 'the'. Word has a range of common errors already included as entries and you can add your own to these. If you don't want a word automatically corrected, simply click **Undo** (or press **Ctrl+Z**).

To create an AutoCorrect entry, select **File**, **Options**, then select the **Proofing** tab and choose **AutoCorrect Options**.
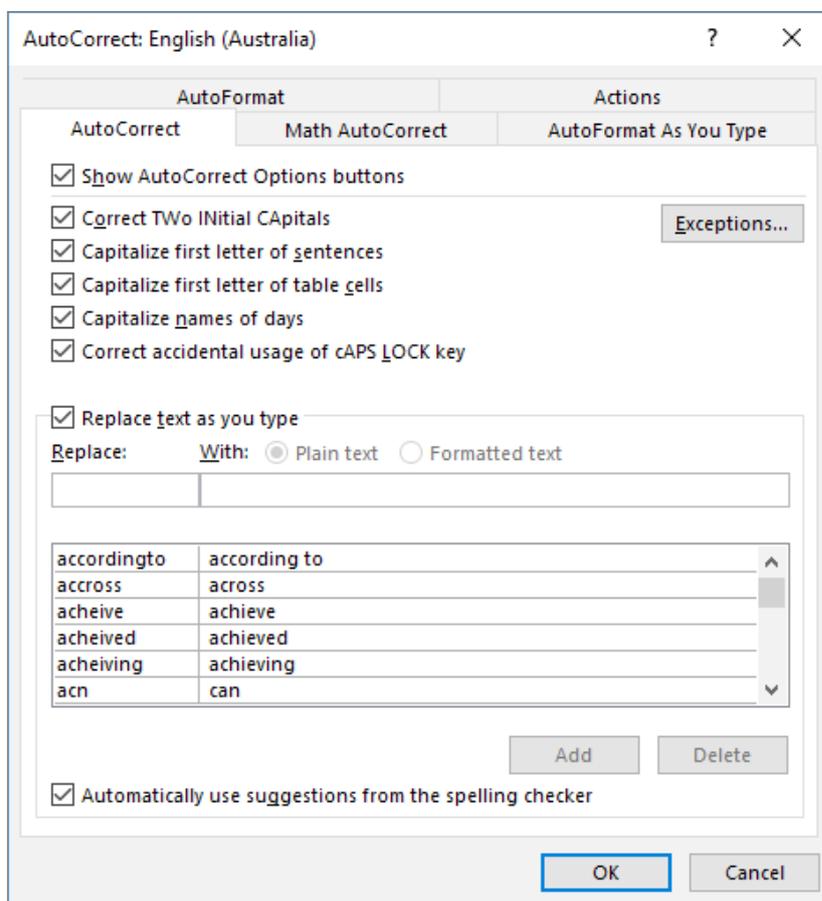
Type the incorrect version of the word in the **Replace** box. Type the correct version in the **With** box. Click **Add**.

To remove an AutoCorrect entry, scroll down and select the entry you wish to remove from the list by clicking on it, then click **Delete**.

Header and footer

Headers and footers are used to present important information at the top or bottom of each page.

Depending on the document type, headers or footers may be used to display information such as:

- the name of the organisation
- the document title
- the filename and path
- page numbers
- the location, date and time the document was created.

The contents of headers and footers can be saved for use in templates.

A header appears at the top of a page and a footer appears at the bottom. The information that appears in headers and footers is the same on every page of a document, or within sections of a document.

To insert a header and footer, select the **Insert** tab and click **Header**. Select a **Blank (*Three Columns*)** style from the drop-down menu.
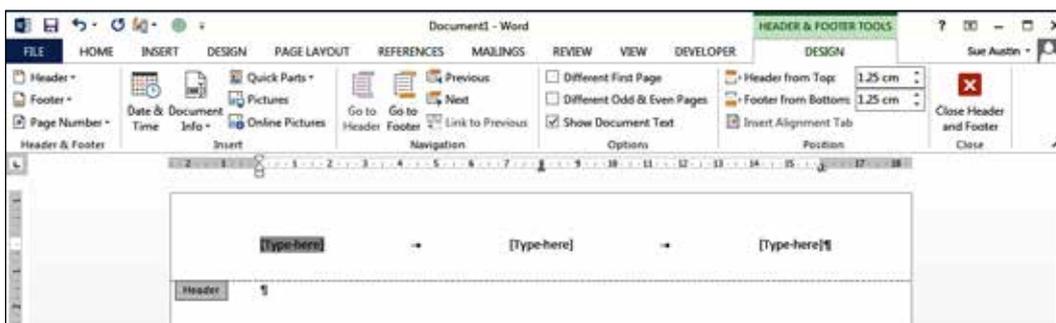
From the **Header & Footer Tools** tab you can insert:

- page numbers
- the date
- the time (with an option to update automatically).

Many organisations require the date or time to be automatically inserted into documents. This helps to track when documents were created or edited, acting as a form of version control.

Ensure that English (Australian) is selected as the language so that the day, month and year will be displayed in the correct order, then select a format from the left-hand side.

If you want the date or time to be updated each time you open the document, click **Update Automatically** when inserting the date or times. If this is not ticked, the date or time will not change when the document is updated.

When creating large documents, such as reports or booklets, you may be required to display different information in the headers and footers of odd and even pages. To create alternate headers and footers, select the header or footer you have created by double-clicking it. Tick **Different Odd & Even Pages** in the Options section.

You will now see that the header and footer names have changed to **Odd Page Header** and **Even Page Header.** Enter the information required into the odd and even headers.

Another option is to have a different first page. This is useful when creating documents that have a title page where headers and footers are not displayed. For this option, simply tick **Different First Page.**
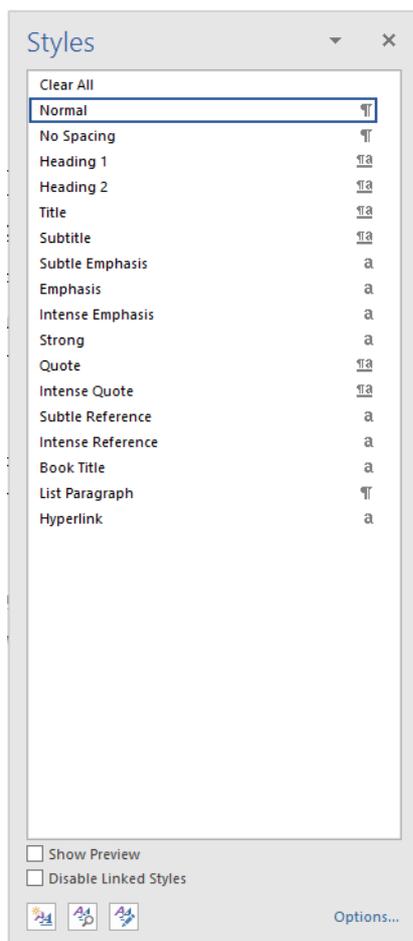
Styles

When you are creating a document that uses consistent headings and text styles, the most efficient way to format it is to create styles.

A style is a set of text formatting conditions that are applied to characters or to a paragraph. The advantage of using style sheets is that when you change the style, Word automatically changes all characters or paragraphs in the document that uses that style.

By creating templates with well-organised, sensibly named styles, you will increase your document production efficiency as you will be able to format text in just one or two steps rather than having to take several steps each time.

Creating styles for frequently used documents such as letters, flyers and brochures will save you time because you can just apply the style to each paragraph in the document.

To identify a paragraph's style, select the paragraph by clicking anywhere inside it. Select the **Home** tab and click on the small downwards arrow below the **Styles** box. The Styles window will now appear.

Each style is identified as either a paragraph style (marked by the symbol ¶) or character style (marked by the symbol a). Experiment with using different styles, and changing and modifying styles.

You can move the styles box to different sides of the page you are working on by dragging it with your cursor.

To create a new style, select the text you want to create as a new style. Select the drop-down arrow at the edge of the style box and select **Create a Style.** You can also select the **New Style** button [icon] at the bottom of the Styles box. Give the style a name and click **OK**.

This style will then appear in the Styles gallery.

To modify a style, click on the drop-down menu next to the style you wish to modify in the Styles box. Click **Modify Style**. You can then change the font size and type and access additional formatting options by selecting the **Format** drop-down menu.

The changes you make will apply to all text that has that style applied to it.

Default settings

By becoming aware of the default settings available in your software, you can maximise the efficiency of your data editing.

Default settings determine the options that automatically appear when you perform a task.

You can change the defaults for a variety of tasks by clicking the **File** tab and choosing **Options**. Review the contents of each option until you find the setting you want to change.

Some examples of defaults you can set are provided here.

Default file location

The folder that files will automatically be saved in.

Default printer

The printer a document will be sent to when you click the print icon.

Default language

Allows you to set the language for your documents; for example, English (Australia).

Understand a document's formatting

One of the greatest challenges you may face when using documents someone else has created is working out how it was formatted.

One of the most useful tools in Word is the Show/Hide option. The Show/Hide button [¶] on the Home tab allows you to see the document's non-printing characters. The non-printing characters let you see a range of information, including where the paragraph ends, where spaces have been placed and where the Tab key has been used. When you become familiar with the non-printing characters, you can use them to check that the formatting of your document is consistent.

Below are some common non-printing characters.

Paragraph symbol (also known as pilcrow)

¶ This mark is created when you press the Enter key to end a paragraph. Word does not look at paragraphs like we do; it relies on the use of the Enter key to know where they start and end.

Space

lot of cor
can these
updated

This small dot indicates that the Space bar has been pressed. You can tell how many times the Space bar has been pressed by the number of dots that appear between words.

Non-breaking space

sed°do

A non-breaking space can be created by pressing **Ctrl+Shift+Space**. You use a non-breaking space if you want to ensure that two or more words are always printed on the same line and never automatically separated by Word's automatic line breaks.

Tab space indicator

→ This symbol is used for two purposes in Word. It is used to indicate that the Tab key has been pressed on the keyboard, and it is also used in numbered or bulleted lists as the tab space between the number or bullet and the text.

Line break

↵ A line break can be created by pressing **Shift+Enter**. It is used to start a new line without starting a new paragraph. This means that when you apply formatting (for example, indenting) to the text, Word will treat the lines as one paragraph.

This example shows non-printing characters, allowing you to see the formatting that was applied. You can see that several of the effects have been created using an inefficient method that may cause problems if the document is edited at a later date.

Used spaces instead of indenting the paragraph. This will cause problems if the font is changed.

The font size has been changed to make these lines (gaps) smaller.

See how these paragraph characters are smaller than the ones after the text.

Incorrect number of spaces between words.

Enter pressed at the end of each line. Will cause problems if you change the font style or size.

Common formatting mistakes¶
¶
Spaces between words¶
¶
You can see by the number of black dots between the words in this sentence that I have pressed the space bar twice between each word. This sentence only has one space between words, which is the correct number to use.¶
¶
Indenting¶
¶
This paragraph has been indented by pressing the space bar. The person should have changed the Indentation settings. Notice how the left edge is not exactly even and they have had to press the Enter key at the end of each line rather than letting it automatically wrap onto the next line.¶
¶
Spacing after paragraphs¶
¶
Have you ever seen a range of different font sizes used for the lines of a document? Notice how the paragraph markers above and below this paragraph are smaller. People often change the font size in order to space out a document when they should be changing the space before and after the paragraph. This is a common mistake.¶
¶

When you look at the document, you can see that the operator has not used good word-processing practice. The extra spaces used to create indents and the manual line breaks are likely to cause issues for anyone who is editing the material. This table lists the mistakes and the correct method that should be used.

Mistake	Correct method
Incorrect number of spaces between words	Only press the space bar once between words.
Enter pressed at the end of each line	Allow the text to auto-wrap as you type. This will ensure that changing the font or other formatting will not cause problems later on.
Spaces used to indent text	Create the text as one paragraph, then use the **Increase Indent** button in the **Paragraph** grouping under the **Home** tab.
Changing font size of paragraphs between sections of text to adjust the gap between lines	Use the **Line and Paragraph Spacing** button in the **Paragraph** grouping, rather than having a blank line between paragraphs.

Indents

The indent of a line of text or paragraph refers to how far it is positioned from the margin.

Text can be indented on either the left or right side of the paragraph, or both. Indenting is useful for drawing attention to sections of text. It can be used very effectively to emphasise lists of data, including bulleted lists.

To indent a section of text, select the **Page Layout** tab and adjust the settings under Indent**.**

Alternatively, click the small downwards arrow next to **Paragraph** on the **Home** tab and adjust the settings under Indentation.

Font styles, size and colour

Your word-processing software has many fonts to choose from and you can apply a range of sizes, colours and effects to these.

Changing the size or colour of a section of text can add impact to your document.

Be careful not to overuse these features as too many fonts can make a document hard to read. The document type, purpose and audience are important considerations in font selection. You would most likely only use two to three different fonts, sizes or effects in a business report: one for major headings, one for minor headings and one for body text. However, if you were preparing a newsletter or flyer, you may use several different fonts to make important information stand out and look eye-catching.

You can select a font from the drop-down menu in the **Home** tab. For the full range of font formatting options, click on the arrow in the lower left of the Font section to open up the dialogue box. This gives you access to additional effects and a handy preview window so you can see how your changes will look.

You can also apply styles such as Bold, Italics and Underline by clicking on the appropriate button.

To apply a font colour, click on the arrow next to the **Font colour** symbol and choose a colour from the palette shown. The selected text will be changed to reflect your selections.
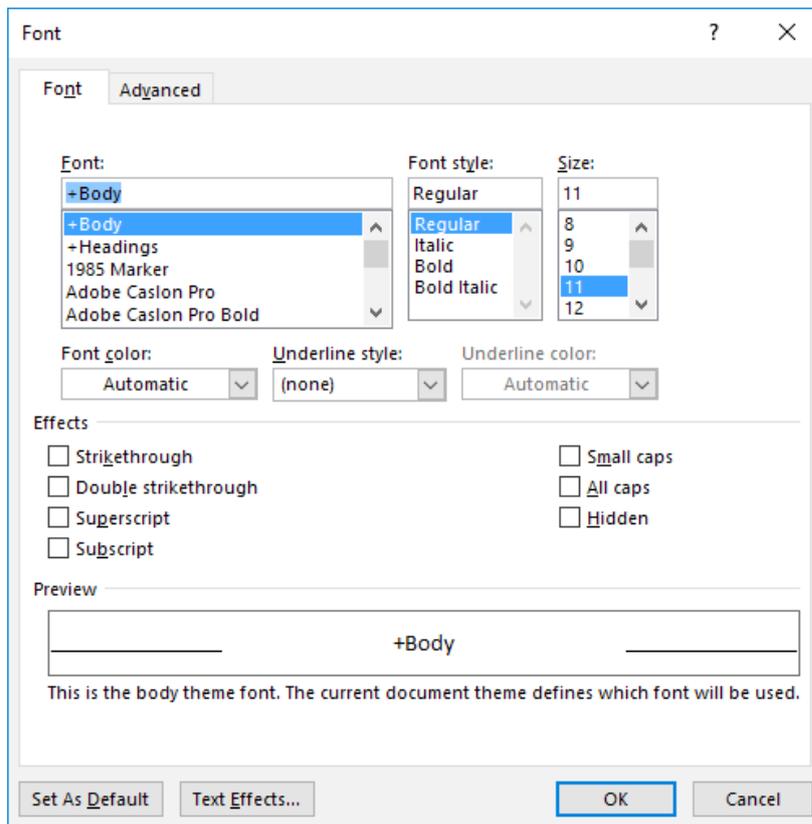
Captions

Captions are words you can add to tables, graphs and pictures.

They can be used to guide the reader, either to help them identify which graphic you are referring to in the text or give more details about an image. Captions are used to name diagrams or data in tables or to identify people and other details in photos.

To add a caption, select the picture, graph or table that you want to add a caption to.

Select the **References** tab and click **Insert Caption**.

Select a **Label** from the list or click **New Label** to make a new one. The label you have selected will appear in the caption box.

Click in the **Caption** box and type your caption.

Select the position for the caption, either above or below the selected item, then click **OK**.

To remove the label from your caption, click on the caption text box that has been created and edit the text.
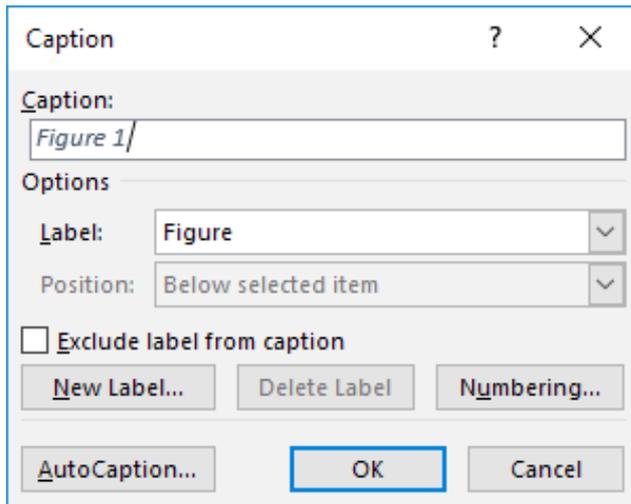
Bullets and numbering

Using bullets and numbers to clearly separate points in a list can improve the presentation of text.

A variety of number formats and bullets are available in your software and you can even import pictures to use as bullets.

Numbers

Numbers are generally used to denote items that are in order. For example, if you were writing a list of the top three sales people for an organisation, you could write:

1. James Harker
2. Rose Marcus
3. Peter Jenz

Numbers are also used when creating step-by-step instructions for people to follow, such as a recipe or procedure.

Bullets

Bullets are used to list items that are not in any particular order but need to be shown clearly in a group.

For example, a company might include a list of staff who attended a workshop in the following format:

• Hank Palmerston
• Ally Holden
• Thanh Ng

They can also be used to separate items that have the same stem. For example:

To increase staff morale, it was decided that:

• a new coffee machine would be purchased
• Friday night drinks would start in the office from 4.30pm
• staff would receive one rostered day off per month.

To format a list, select the **Home** tab, then click on the drop-down menu for **Bullets** or **Numbering**. Select a bullet or numbering type from the library or choose **Define New Bullet** or **Define New Number Format** to make adjustments. Click **OK**.

Footnotes and endnotes

Footnotes and endnotes are used to provide additional information, clarification or references in documents.

They are commonly used when quoting a book or website or acknowledging an idea from another source. Footnotes are placed on the bottom of the page with the referenced text, while endnotes are positioned at the very end of the section or document.

When creating footnotes and endnotes, use a consistent style of referencing. Generally the document will have one or the other, not both. You will need to ask your supervisor or refer to your organisation's style guide for the preferred referencing format.

Word will automatically assign the footnote and endnote numbers and update them should you remove or add any additional footnotes.

To insert a footnote or endnote, click next to the section in the text that requires the footnote. Select the **References** tab and click either **Insert Footnote** or **Insert Endnote**.

You will be moved to the bottom of the page or section and can type the reference details.

Each footnote or endnote you create will have a corresponding number, letter or symbol that links it to the body text you originally selected. You can change this format by clicking on the arrow in the bottom right of the Footnotes section.

To remove a footnote or endnote, select the superscript number indicating the footnote or endnote, then delete the number by pressing **Backspace** on the keyboard. Check that the number or symbol was deleted in both locations (both in-text and at the bottom of the page or section).
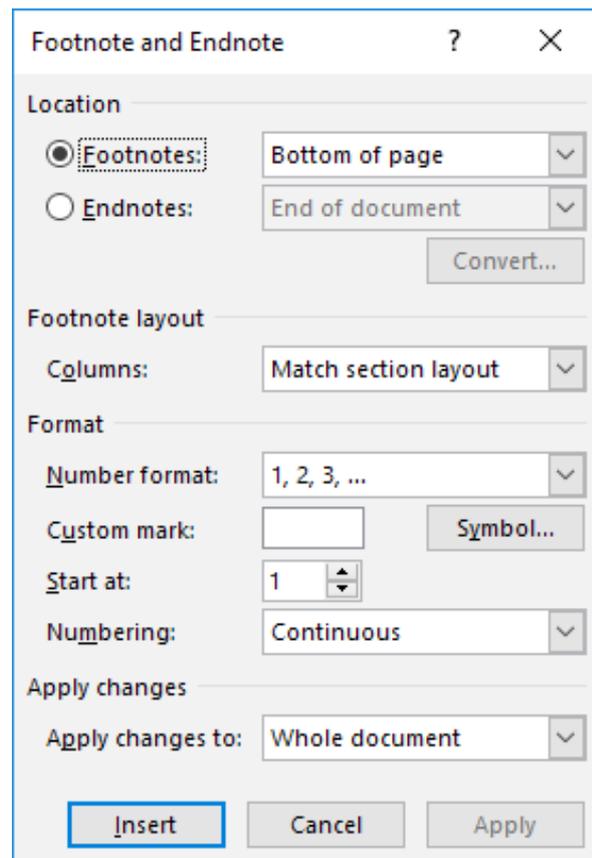
Annotated references

When you design a document that will be edited by another person, leaving some notes or comments to guide them in using the document can be helpful.

For example, you might tell the document user where missing information needs to be entered or give details about formatting.

This comment tells the user how the space above the paragraph was created.

To create comments, highlight the text you would like to make a comment about. Select the **Review** tab, then click **New Comment**. You can then type your comment in the box provided.

To view comments that have been made in the document, click the **Show Markup** drop-down menu in the **Review** tab and ensure **Comments** is ticked. You can also use the drop-down menu above this to select **All Markup**. This will display all the comments and tracked changes in the document.

To delete a comment, right-click on the comment box and select **Delete Comment** from the drop-down menu.
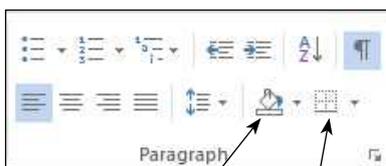
Borders

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

In Word, you can add a variety of borders to paragraphs, selected text, tables or the entire page. Borders can be used in documents such as newsletters to accentuate and draw attention to important items; for example, an advertisement for an event.

When creating promotional documents such as flyers, brochures and invitations, the border type selected will contribute to the style of the document. For a formal look, choose one of the line styles.

To create a border around one or several paragraphs of text, select the paragraph you want a border around. Select the **Home** tab, then click on the **Borders** drop-down menu and select **Borders and Shading**.

Shading and Borders

Here you can change the **setting**, **style**, **colour** and **width**. You can also choose to put a border around the entire page by navigating to that tab. You can choose which sides have a border by clicking on the borders in the preview on the right-hand side. You might also like to experiment with paragraph shading by selecting the **Shading** tab.

Practice task 6

You work for Total Accounting Solutions and your supervisor has requested that you create a new letter template. The following guidelines need to be followed when designing and creating templates:

- Organisation name, address, phone number and email address are to be included in the header.
- Organisation details:

  Total Accounting Solutions

  PO Box 459

  CAULFIELD VIC 3185

  Phone: 03 9847 6651

  Fax: 03 9847 6612

  Email: info@totalaccounting.com.au
- The company slogan is to be included in the footer. The company slogan is: 'Helping you through accounting and financial advice'.
- Left and right margins should be 2cm.
- Top and bottom margins should be 1.5cm.

When you have finished, save your template as 'TAS Letter template'.

2B | Insert tables, images and charts

Tables are used in documents to display information and data in rows and columns.

To create a table, select where you want the table inserted. Select the **Insert** tab and click **Table**. From the drop-down menu you have a number of options to create a table. You can move the pointer over the grid to choose the number of rows and columns that you want – as you do this a preview of your table will appear in the document. You can also select **Insert Table** and enter the number of columns and rows you want, then click **OK**. A table will now be inserted in the text.

Alternatively, you can select the **Draw Table** option, which allows you to draw the table directly into the document through a series of boxes that you can join together. This can be helpful if you need a specific design for your table, such as some columns that are much wider than others.

Another method is to enter a spreadsheet into the document and input data directly. To do this, select **Excel Spreadsheet.** The following table will appear.
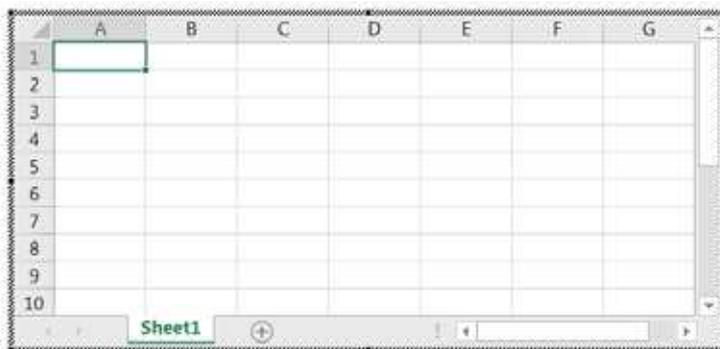
You can also use the **Quick Tables** menu, which offers predefined templates that you can choose from.

Once you have created a table, you can click into each of the cells and enter your data. To move between cells, you can click into each cell, use the arrows on the keyboard to navigate, or press **Tab** to move right and **Shift+Tab** to move left.

Remember, when experimenting with the different tools, you can use your undo tool on the Quick Access Toolbar or press **Ctrl+Z** to undo any action.
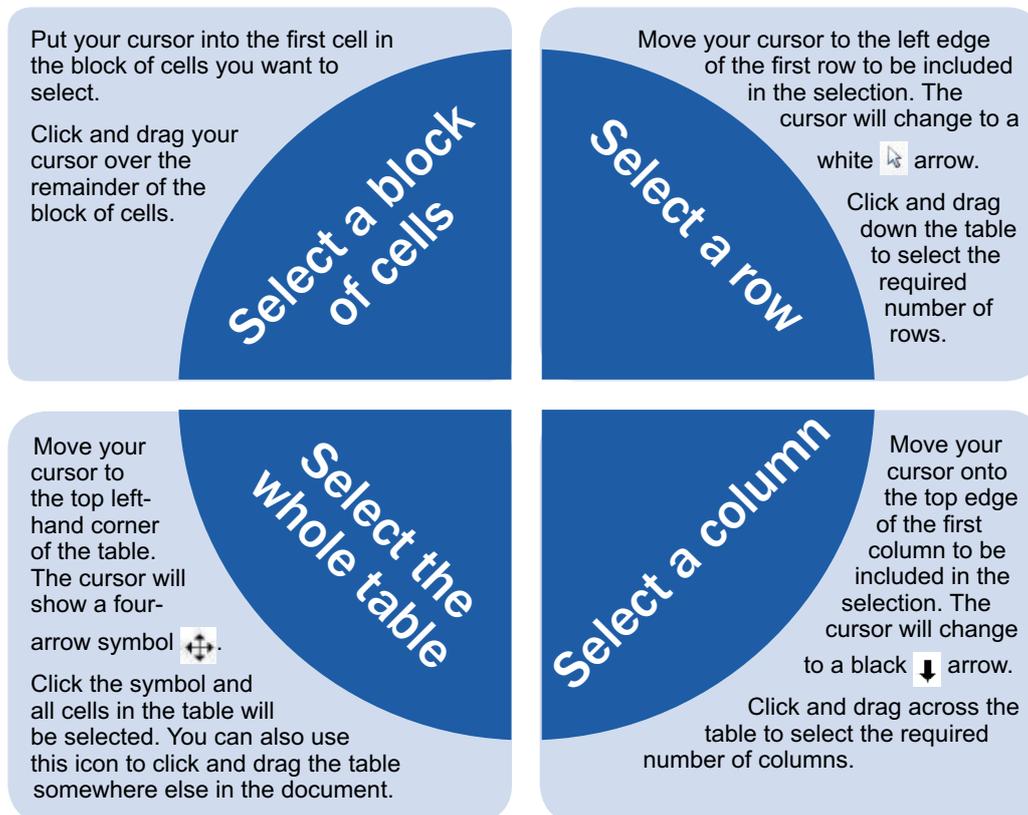
Adjust the table layout

Before you can apply any formatting or manipulate data in any part of a table, you need to be able to select the specific parts you want to format.

When you click into the table you have created, you will see a new section appear in the Ribbon called Table Tools. The **Layout** tab gives you access to features, such as inserting or deleting rows and columns, changing the height and width of cells, and merging or splitting cells.

Merging allows you to join cells together. This would be useful if you want to have a title across the top row of the table and a number of columns underneath. Splitting lets you break one cell into several parts. You can also split the table into two by selecting **Split Table**.

Just as you can set the alignment of text or graphics, you can change the alignment of the contents of cells. You can choose to centre text horizontally and/or vertically, or align text to the top or bottom, left or right of a cell.

The following information gives you further details about selecting different parts of a table.

Select a block of cells

Put your cursor into the first cell in the block of cells you want to select.

Click and drag your cursor over the remainder of the block of cells.

Select a row

Move your cursor to the left edge of the first row to be included in the selection. The cursor will change to a white ⬚ arrow.

Click and drag down the table to select the required number of rows.

Select the whole table

Move your cursor to the top left-hand corner of the table. The cursor will show a four-arrow symbol ✛.

Click the symbol and all cells in the table will be selected. You can also use this icon to click and drag the table somewhere else in the document.

Select a column

Move your cursor onto the top edge of the first column to be included in the selection. The cursor will change to a black ⬇ arrow.

Click and drag across the table to select the required number of columns.

To insert columns and rows, click in the cell adjacent to where you wish to create a new column or row. Click the **right mouse button** and select **Insert** from the drop-down menu. Choose where you wish the new column or row to be inserted (to the left, right, above or below the selected cell).

If you require more than one column or row, you can press **Ctrl+Y** to repeat the insertion.

To delete columns or rows, right-click in the column or row you wish to delete, then select **Delete Columns** or **Delete Rows** from the drop-down menu.

To maximise readability and accommodate information needs, it may be necessary to resize the columns and rows of the table. You can do this in several ways, as the followng outlines.

Using the mouse

Move your mouse to the right edge of a column you want to resize. The cursor will change into a two-headed resize ┅┋┅ arrow.
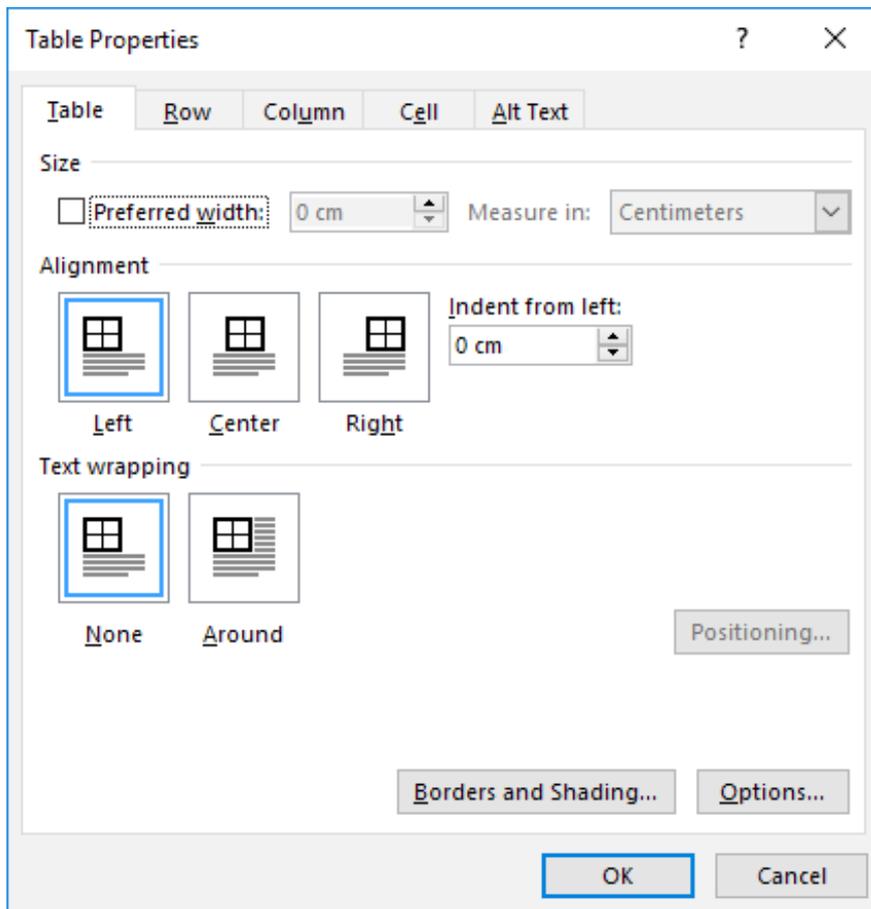
Click and drag the column to the required width. Note: This method will change the width of adjacent columns.

You can use a similar method to adjust the height of a row.

Using the menu

Select a column or row to resize.

Select the **Layout** tab. Click the arrow to the bottom right of the Cell Size section. The following will be displayed.

If you click the drop-down menu you can click on the **Previous Column** or **Next Column** buttons to change the width of adjacent columns.

Select a row and repeat these actions to modify its size.

Using the ruler

This applies to columns only. Move the pointer to the hashed area on the ruler to resize. The pointer will change to a double-headed arrow.

(Note: This method will maintain the width of adjacent columns.)

Design and format tables

There are many options for designing and formatting tables to improve the readability and visual appeal.

The **Design** tab gives you access to many different design tools. The Table Styles section is particularly useful to apply a set design. Use the drop-down menu to see more designs. As you hover your cursor over each one, a preview will display in the table on your page. Alternatively, you can modify a table style or customise your own using the shading and borders options in the **Design** tab.
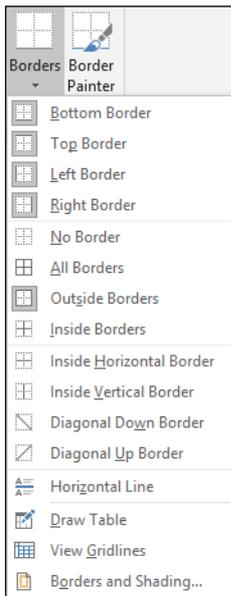
To apply borders, select the cell or range of cells you want to apply the border to. Click the drop-down arrow underneath **Borders** in the **Design** tab to see border options. Click the border you want to add or remove. You can also select **Borders and Shading** to format borders. For example, you can add a border to only one side of the cell by clicking on a border style, then clicking on the side of the cell you wish to apply it to in the Preview window.
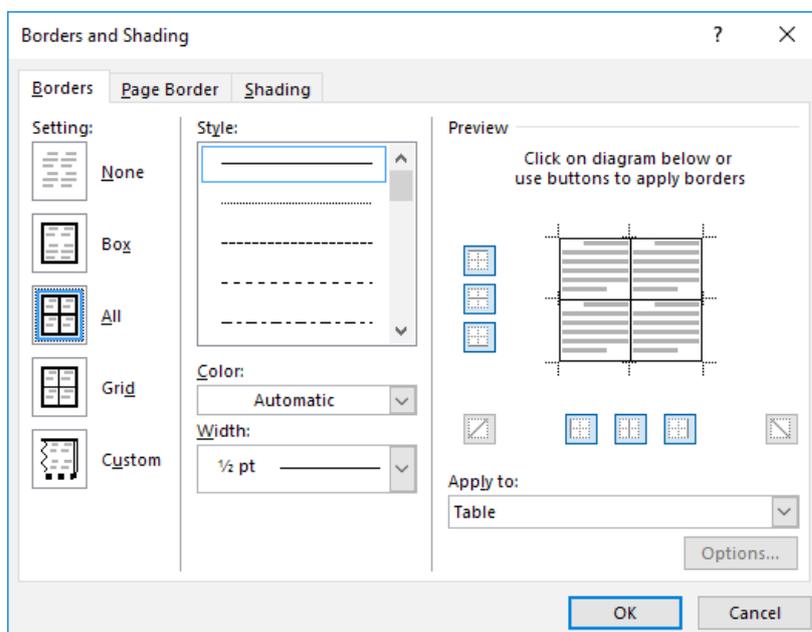
In addition to adding borders to particular cells, you can also individually select block shading of cells.

To apply shading, select the cell or range of cells you want to apply shading to. Click the drop-down arrow underneath the **Shading** button and then click on the shading you would like.

Practice task 7

Using the instructions provided in this section, create a table with seven rows and three columns. Merge the top row, then split a couple of cells, and apply different borders and shading options to various cells. Save your document with the name 'Table Practice'.

Inserting pictures

Inserting pictures into a document is easy when they are in a digital file format.

Your word-processing software will recognise a large range of file formats, including Windows Bitmap (BMP), JPEG File Interchange Format (JFIF) and Graphics Interchange Format (GIF). Digital photos are often used in flyers and newsletters.

When you have a hard copy printout of a picture or logo you want to insert in a document, you can import it using a scanner. The quality of the image will depend on the quality of the hard copy and the settings on your scanner.
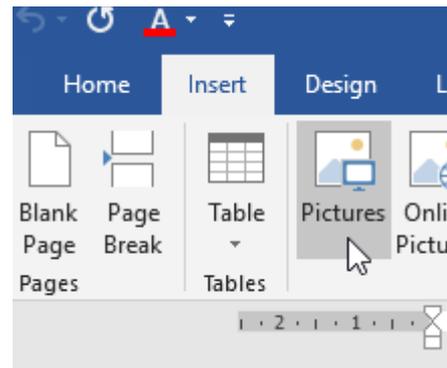
To insert a picture into your document, select where you want to place the image. Select the **Insert** tab and click **Pictures**. You can then go to the drive and folder containing your picture, select the picture you want and click **Insert**. Adjust the size and position of the picture as required.

Moving and resizing pictures

Once you have inserted a picture, you may need to move and resize it, or wrap text around it to change how it appears on the page.

To resize and move graphics and objects, click on the object to be resized and resizing handles will appear on the corners and sides of the object. Position the pointer over one of the handles and the pointer will change to the resize arrow. Click and hold the left mouse button and drag to change the object to the desired size.

To move an object, position the pointer on the object so it changes to the move ✛ arrow. Click and hold the left mouse button and drag the object to its new location.

When you click on an image, a circular arrow will appear at the top. This is for rotating the object. A box will also appear alongside the object, which offers layout options such as having the object in line with the text or to wrap text around the object.

There are several different wrapping styles, as shown here.

Square	The text will wrap around the object. You have the option to allow the text to wrap around both sides, the left only, the right only or largest only. Largest only is the side of the graphic with the most space.
Tight	This style is similar to square. However, if the graphic is not square the text will wrap in against the edges of the graphic.
Through	Occasionally a graphic may have a gap in the picture. This form of text wrapping will wrap tight around the picture, and text will also be placed in any of the gaps.
Top and bottom	Text will be placed above and below the object. No text will appear on the left or right sides.
Behind text	The object will be placed behind the text. This means that text will flow over the top of the object. This is similar to a watermark effect.
In front of text	The object will be placed in front of the text. Using this option, you may not be able to read all of the text if it is behind the object.
In line with text	The object will be placed in line with the text. You can select the object and move it like you would any section of text.

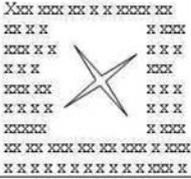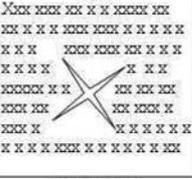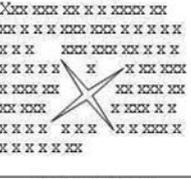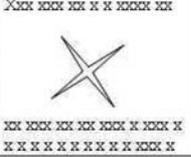The following example shows the way the graphic and text interact using each different text wrapping style.

Table of contents

A table of contents can be a useful way to navigate large documents, such as reports.

You can insert a hyperlink (text or graphic that you click on to take you to another location) either from one part of a document to another part or to an external file or website.

A reference hyperlink is included in the table of contents so that when you press the **Ctrl** key on the keyboard and click on an item in the table of contents, the document will jump to that position.

To create a table of contents, move to the position in the document where the table of contents will be positioned. Select the **References** tab and select **Table of Contents**. Then choose one of the built-in options, or choose **Custom Table of Contents**. This will generate a table of contents based on the heading styles that have been applied throughout the document. If a heading is not showing up in the table of contents, the heading style may not have been properly applied.

To jump to a heading in the document, hold down the **Ctrl** key and click on the item in the table of contents.

Practice task 8

Open a new blank Word document. Find and insert three pictures. Add descriptive captions to each of the pictures, then apply the **Top and Bottom** text wrapping style. Write a paragraph of text before and after the pictures. Save and close the document.

Summary

- When creating a document, clarify the purpose, audience and information requirements.
- Consider a range of design aspects and elements when working out the structure and layout of your document.
- Use design and formatting functions to ensure consistency of design and layout.
- Design concepts should be incorporated into your documents to enhance their readability and appearance.
- The style and layout of documents should follow your organisation's requirements.
- Create and use styles to ensure headings and text styles are formatted consistently.
- Change the layout, format and design of tables to improve readability and visual appeal.
- Insert and format graphics to break up text and make documents more visually engaging.

Learning checkpoint 2
Design word-processed documents

Part A

1. Create an A4 flyer advertising the Techno Train Training Centre Open Day. Include the Techno Train logo in your flyer by scanning it or visiting http://chilp.it/a646f9f.

   Information to be included on the flyer:

   Date: 5 June

   Time: 9am – 3pm

   Phone: 07 3876 1333

   Email: info@technotrain.com.au

   Website: www.technotrain.com.au

   Address: 22 Hart Street, CHERMSIDE QLD 4032

   Activities:

   • Meet the trainers

   • Ask an expert

   Short training sessions:

   • Computer introduction: 45 minutes

   • Using a digital camera: 45 minutes

   RSVP: 30 May

2. Write a report about the document you have created. Include the following information:

   a. A description of the purpose and target audience of your document

   b. The design aspects and elements you considered when creating the document and why you applied them.

3. Research a topic of your choice on the internet and write a report about it. Examples of topics you could choose include:

   • the latest fashion trends

   • a comparison of car makes and models

   • a new-release movie

   • information about a new software package or computer game.

   Your report must include:

   • clear descriptive headings

   • at least two footnotes referencing the websites or other sources that were used in your research

   • a footer showing the page number and the current date

   • at least one graphic or table.

   Ensure that you create and use style sheets to format your document. Save and print your report.

Part B

Access and download landscaping-newsletter.docx either by scanning the QR code provided or at: http://chilp.it/d727ba2.

1. Examine the document and list **five** design problems or errors.

2. Recreate the document using the principles of design and layout you have learnt. You can either copy and paste into a new document, or edit the existing file. Save and print your new version.

Part C

1. Create a document that allows you to demonstrate the following:

    *   Two types of indents
    *   Two different bullet styles
    *   Three different fonts
    *   A graphic with a caption
    *   Two examples of borders

    Save and print your document.

2. Produce a document similar to the following example. Your document should use the same layout (positioning of text and images), similar heading styles, tables and margins. Ensure you create appropriate styles to support the formatting of the document. Save the document as 'Capricorn newsleter.docx' and print it.

Topic 3
Produce digital text documents

When producing digital text documents, editing, printing and storing documents are important steps to follow.

You should also use various software functions to ensure that documents are produced in the most timely and cost-effective manner. The advanced functions explained in this topic will allow you to streamline your operations and ensure that documents are produced consistently and efficiently.

In this topic you will learn how to:

3A   Use advanced software functions
3B   Import and edit text and other data
3C   Meet time lines and overcome problems with document production
3D   Save and print documents

3A | Use advanced software functions

Word-processing software programs contain hundreds of software tools to assist you in creating and editing documents.

Knowing which functions to use to produce various effects ensures you can create professional-looking documents and complete your work efficiently.

Just like any trade, the more tools you have available, the easier it is to get the job done. If you complete tasks using the correct formatting and functions, your colleagues will be able to easily edit and make changes to the documents you have created. For example, if you did not know how to use section breaks to change the number of columns on a page and you had incorrectly used two tables to create the same effect, the next person to use the document would have to reformat the contents correctly into two columns. A lot of valuable time would be wasted.

Sections

Sections are used to separate parts of the document with a different layout, such as margin size, page orientation or number of columns.

They allow you to have control over the final look of your document. For example, if you want to produce a document that has one page in portrait orientation and the next page in landscape, you would use a section break.

To insert a section break, select where you would like the section break inserted. Select the **Page Layout** tab, then click **Breaks** to open the drop-down menu. Select the type of break you would like from the options. Click **OK**. A section break will be inserted and will look similar to one of the following.

¶·························· Section Break (Next Page)··························

¶·························· Section Break (Continuous)··························

You can only see section breaks when the non-printing characters are on display. Click the **Show/Hide** ¶ button in the **Home** tab to show them.

There is a range of section break types available, which are described here.

Next Page

A new page is started and the new section starts on this page. This option is useful for having more than one page orientation in a document. You can insert a Next Page section break, then change the page orientation on one of the pages from portrait to landscape or vice versa.

Continuous

A new section is inserted on the current page. This technique is used to create pages with more than one column format or with different margins on different parts of the page.

Even Page or Odd Page

A new page section is started on the next even or odd numbered page, depending on which command you choose. Additional pages will be inserted into the document as required. This technique is used in books where each new chapter must start on either an odd or even page consistently throughout the document.

The following example illustrates how section breaks are used.
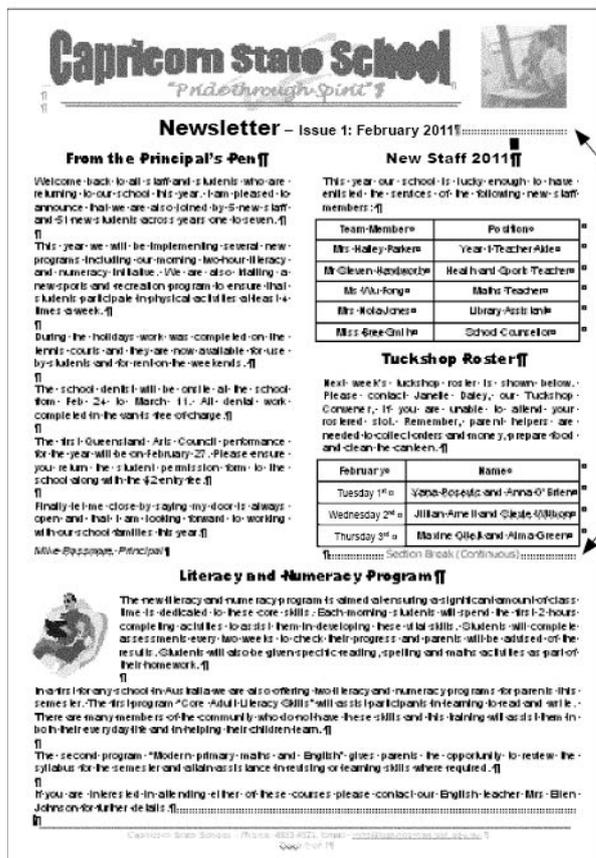
In this example, the first continuous section break is used to change from one heading, 'Capricorn State School' to two columns for the information underneath.

Continuous section breaks

The second continuous section break is used to change from two columns to one so that the larger article is presented in an easy-to-read layout.

To check which section you are currently in, look at the status bar at the bottom of the screen. The section number will be shown as 'Section' followed by the number; for example, Section 1, as shown here.

To remove a section break, click just before the section break or highlight it (hidden characters must be shown). Press the **Delete** key on the keyboard and the break will be removed.

Columns

Columns have a variety of uses, particularly when designing forms, newsletters and brochures.

You can use several formats and options when creating columns. You can:

- divide your page or section into a number of columns or columns of different widths
- change the spacing between columns
- choose whether or not to include a line between the columns.

Unless you have specified otherwise, new documents created in Word will automatically be formatted with one column.

To change the number, width and spacing of columns, select the **Page Layout** tab and click on **Columns**. Select one of the pre-set column options from the drop-down menu or select **More Columns** and manually enter the number of columns you want, along with the desired **Width** and **Spacing**. Click **OK**.

Practice task 9

Using a document that contains large blocks of text, make the following changes.

Change the page layout to have two even columns. Apply the functions and design skills you have learnt so far to create an attractive one-page newsletter. Ensure you adjust the margins and have at least two sections with different numbers of columns on the page. Save your work.

3B | Import and edit text and other data

Software packages enable users to integrate data from a range of sources.

Due to the variety of software programs available, there is a growing trend towards integrating the content generated in them.

A common use of this function is to import data from an Excel spreadsheet into a Word document. Data can be imported as an object from one program to another, saving a lot of time.
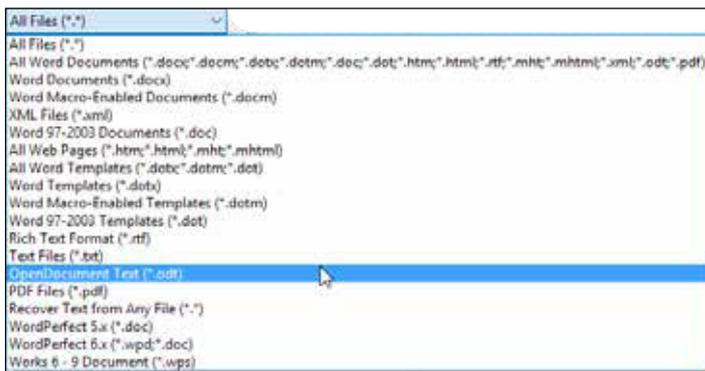
When content can be exchanged between different applications, the programs are referred to as compatible. Many software packages now give users the option of opening a file that was created in a different software package.

You can also save a file in a format that can be opened in another software package. To do this, select **Save As** and choose a different option under the drop-down menu **Save as Type**.

However, because of the differences between software packages, occasionally some formatting may be lost when this method is used.

Importing data

You can insert the contents of a text file or a file that you have created in another program.

The contents of the file you insert will keep its formatting. This technique can be useful when combining information from several sources, such as when you are collecting articles from various authors for a newsletter.

To insert a file into a document, select where you want to place the file. Select the **Insert** tab, and click the **Object** drop-down arrow, then click **Text from File**. Choose the drive and folder, then select the file and click **Insert**. This will insert the entire document.

If you just want to insert a few paragraphs of text, you can open this document separately, highlight the text you want to insert and either right-click and select **Copy** or press **Ctrl+C** on the keyboard. You can then paste it into your document by right-clicking where you want to insert it and selecting one of the paste options. Alternatively, left-click and press **Ctrl+V** on the keyboard.

To insert an object from another program, select the **Insert** tab, click **Object**, then choose **Object** from the drop-down menu. Select the **Create from File** tab, then click **Browse**. Locate the drive and folder containing the data you wish to import, and double-click on the file name. Click **OK**.

The file will be placed into your document. Sometimes the object that is inserted will be too big, so you may need to resize it and then edit it to ensure the correct data is displayed.
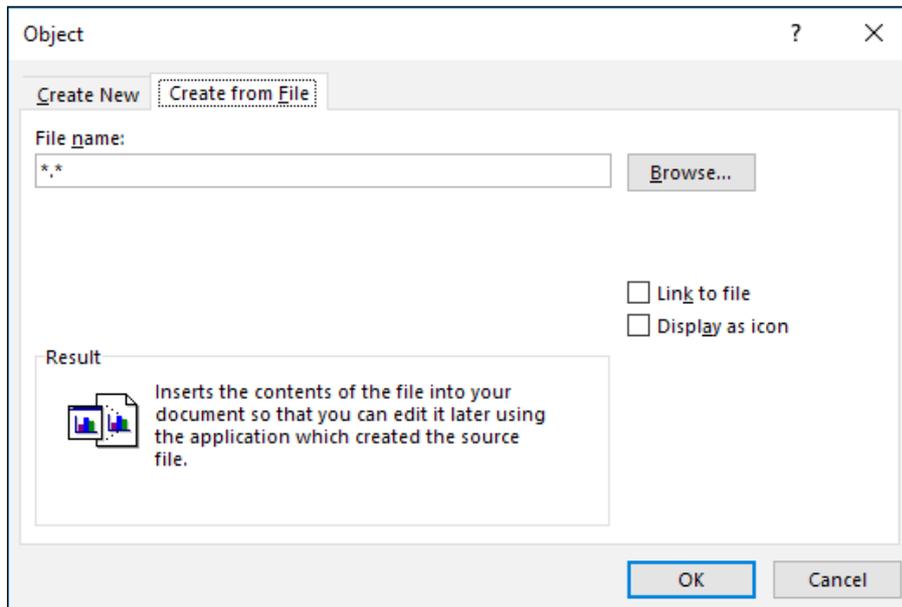
Edit imported data

To edit the object you have imported, double-click on it and you will be in editing mode.

The tools you have available to edit an object will depend on the program that the object was created in. You will generally have a lot of the same functions you had when you created the object in the original program.

Often Excel worksheets will contain a number of rows and columns of data. You may not want all the data to be shown in your Word document, so you may need to adjust the range of cells that are on display.

Double-click on the Excel object to enter editing mode. You will be presented with a 'mini' version of Excel complete with the various worksheets and scroll bars for moving through the data.

To hide any data that you do not want displayed (e.g. blank rows or columns), use the cropping handles on the sides and corners to click and drag to adjust the size of the area displayed. Below the display area has been adjusted so that the blank rows and columns are now hidden. While in editing mode you can also change the data on your spreadsheet.

When you have finished editing your object, simply double-click anywhere in your document outside of the object and the object will once again appear like a graphic. You can now resize the object to meet your needs.

Create a mail merge

Mail merges allow you to combine the contents of two files, one that contains the information you are sending and one that contains details of the recipients.

Mail merges can be used for personalising letters, reports and flyers.

The easiest way to learn about mail merges is to work through the process of completing one.

To create a mail merge, go to **Mailings** tab, click on **Start mail merge** and then select **Step-by-Step Mail Merge Wizard**. At this point, the Mail Merge task pane will appear to the right of the screen.

Follow each step of the process:

- **Step 1:** Select the document type – You can choose from letters, email messages, envelopes, labels and a directory.
- **Step 2:** Select starting document – You may use the current document, a template or an existing document.
- **Step 3:** Select recipients – The recipients are the people who will receive the document. You are given three options:
  - Use an existing list – Choose this if you already have a recipient list or data source available.
  - Select from Outlook contacts – Choose this if you have profiles set up in Outlook.
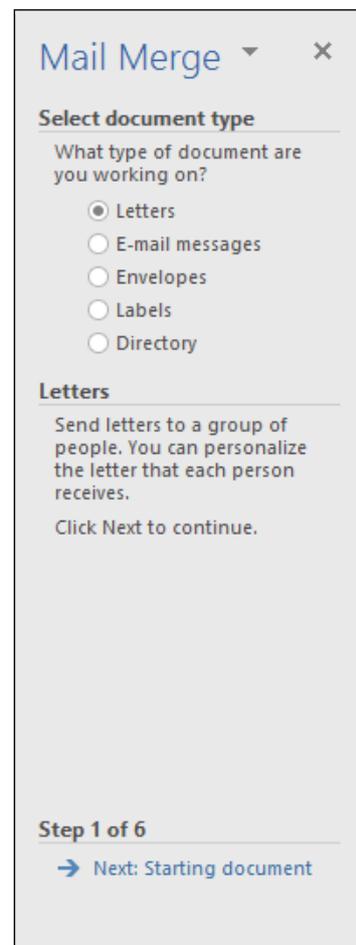
- Type a new list – Choose this if you have not previously created a data source or recipient list. If you choose this option, you can create a recipient list by clicking **Create.** To create a recipient list, you need to set up or customise your columns. To do this, click **Customize Columns**. In the Customize Address List, you can add, delete or rename fields or columns. When entering data, you can either click into each field using the mouse or use the Tab and Enter keys on the keyboard to jump from field to field.

- **Step 4**: Write your letter – Select where you want a field, then click **Insert Merge Field** from the **Mailings** tab. Select the field you want to insert and repeat for each field.

- **Step 5**: Preview your letters – Use the forward and backward arrows in the panel to preview each letter. When you click an arrow, the document on the left-hand side should be updated with the record.

- **Step 6**: Complete the merge – There are two options provided to complete the merge: **Print** or **Edit** individual letters. When saving the document, make sure you save the source document with the merge fields, not the Letters1 document. This is important if you wish to use the same letter at some stage in the future.

Practice task 10

In this practice task you will complete a mail merge based on the following letter.

> 25 February 2018
>
> Henderson Printers
>
> PO Box 522
>
> Maroochydore QLD 4558

Dear Alex,

We are in the process of completing a review of our client records and credit limits and, due to your purchase and payment history, we would like to offer you an increase in your credit limit to $15,000. Your current limit is $10,000.

If you are interested in increasing your credit limit, please contact us and discuss your preferred credit limit with Ellen, our financial controller.

Yours sincerely,

Brett Thomas

Manager

1. Open a new blank document in Word.

2. Select the **Mailings** tab, click on **Start Mail Merge** then select **Step-by-Step Mail Merge Wizard**.

3. Select **Letters** from the task panel and click **Next: Starting document**. Now you need to set up your letters.

4. Select **Use the current document**, then click **Next: Select recipients**.

5. Select **Type a new list**, then select **Create**.

6. Create a recipient list with the following information. Remember to customise your address list first.
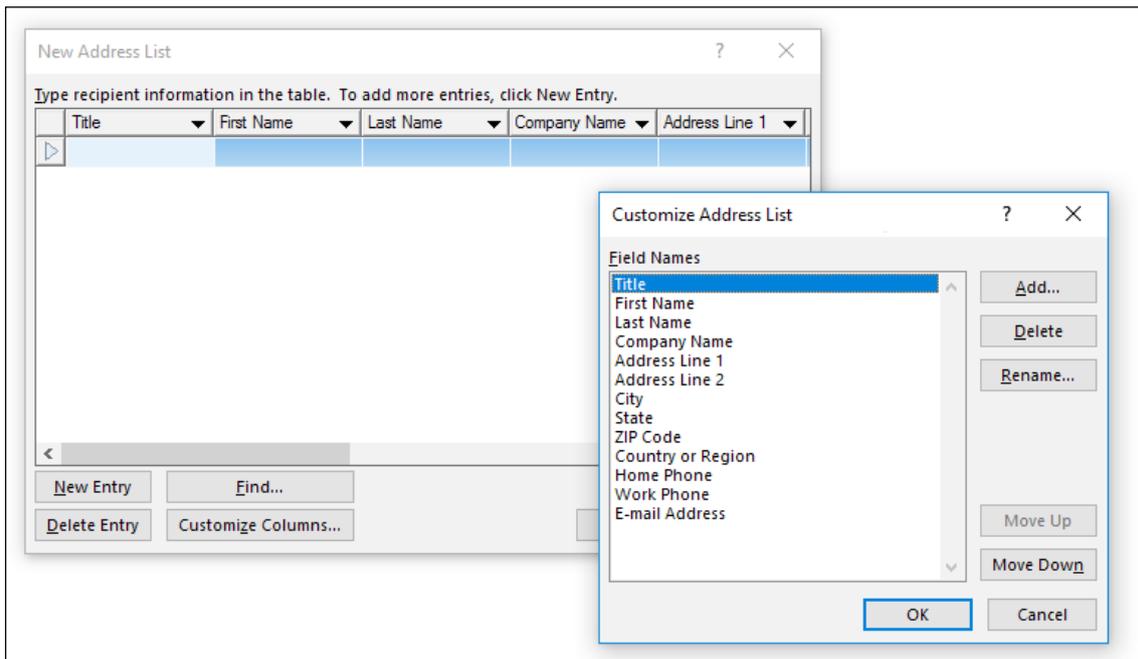
Company name	Address	City	State	Post code	First name	Surname	Current credit limit
Henderson Printers	PO Box 522	Maroochydore	Qld	4558	Alex	Bolton	$10,000
Ingles Accounting	28 Melville Street	Noosa	Qld	4566	Susan	McFee	$4,000
John Marcus & Sons	PO Box 193	Beerwah	Qld	4519	John	Marcus	$8,000

7. Type these details into the fields. To create a new record, click **New Entry** after you have entered a record. When you have finished entering all the details, click **OK** to save the list. Choose an appropriate location for the list file and an appropriate name for the recipient list. Click **Save**.

Title ▼	First Name ▼	Last Name ▼	Company ... ▼	Address Li... ▼	City ▼	State ▼	Postcode ▼	Credit limit ▼
Mr	Alex	Bolton	Hendersons ...	PO BOX 522	Maroochydore	Qld	4558	$10,000

New Address List ? ×

Type recipient information in the table. To add more entries, click New Entry.

New Entry   Find...

Delete Entry   Customize Columns...   OK   Cancel

8. Ensure all recipients are ticked. Click **OK**. Then click **Next: Write your letter**.

9. Now type and format the following letter, including the defined merge fields. To do this, select where you want the field, then click **Insert Merge Field** from the **Mailings** tab. Select the field you want to insert and repeat for each field.

25 February 2018

Henderson Printers

PO Box 522

Maroochydore QLD 4558

Dear Alex,

We are in the process of completing a review of our client records and credit limits and, due to your purchase and payment history, we would like to offer you an increase in your credit limit to $15,000. Your current limit is $10,000.

If you are interested in increasing your credit limit, please contact us and discuss your preferred credit limit with Ellen, our financial controller.

Yours sincerely,

Brett Thomas

Manager

10. Click **Next: Preview your letters**. Use the forward and backward arrows in the panel to preview each letter.

11. Click **Next: Complete the merge**. Click **Edit individual letters**. Select **All** and click **OK**.

12. Select the **File** tab and choose **Save As**. Save the file to an appropriate place on your computer or network server.

Edit documents

Once you have drafted a document, the next step is to review and edit it to ensure it meets organisational and task requirements.

You need to check the style and layout of the document and you must also check the spelling, grammar and punctuation.

Make sure you allow time for editing and proofreading documents before they are printed, published or distributed to colleagues. You may need to complete a final check of the style and layout specifications and look out for spelling and grammatical errors.

Many organisations have a checklist to help people systematically go through the points that need to be considered before a document is finalised. Your organisation may have some special requirements that need to be checked as part of the editing process, so make sure you are familiar with these.

Below are some aspects to keep in mind when editing and proofreading documents.

Document type

Ensure you have selected the correct type of document. For example, when asked to collect some information, do the results need to be presented in a report or can they go into a memo?

Audience, purpose and contents

Is the document you have produced suitable for the audience and purpose? Does it need to be formal or informal? Is the language appropriate? Is there too much jargon? Is all the required information included? Is it presented in an easy-to-understand format?

Spelling, grammar and punctuation

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. Words may also be spelt in different ways; for example, American and Australian spelling for words such as organize/organise. Check the in-house style manual. You will need to use your discretion to decide whether the suggested option actually is the best (or even correct!) one.

Style

Ensure you have used the correct template, if one is available. Have you followed the guidelines in the organisation's in-house style manual, including use of logos and fonts? Is the style consistent? Make sure headers and footers are correct and spacing is consistent throughout. Check the in-house style manual.

Numerical and statistical data

Match your document with the original figures you were given, and check that all data and calculations are accurate. It is very easy to make a mistake when entering a lot of numerical data into a document.

Failing to check work thoroughly

Nancy is an administration assistant working for a supplies firm. She has just finished typing up the monthly sales report. She considers herself very efficient, and has completed this task regularly for the last six months. She sits down and proofreads the report, picking up a couple of formatting errors, but is confident it is ready to go. She puts a copy in the manager's tray and then proceeds to make 100 copies to distribute at the sales meeting.

Peter, another employee, comes over to the photocopier and picks up a copy of the report while waiting to do his own copying. He reads the first paragraph and sees that it mentions an increase of 50 per cent in new sales, when he is sure the manager's memo on the subject mentioned an increase of only 15 per cent.

After a quick glance at another section of the report, he notices the name of a valued client, 'Paula Mart' has been mistyped and reads 'Paula Nart'. Peter approaches Nancy regarding the errors and suggests that the report needs further proofreading. Nancy is shocked and says she will re-read the report right away and correct any errors.

Practice task 11

Work through the following task to practise importing and editing an Excel worksheet.

1. Access and download client-fees.xlsx at: http://chilp.it/d68ee79.

2. Import this Excel file into a blank Word document.

3. Resize the object so that it takes the full width of the page.

4. Save and print your work.

3C Meet time lines and overcome problems with document production

When you are assigned a task in the workplace it is important that you clarify when it needs to be completed by.

A time line sets the schedule for a task or project. It gives details of each task that needs to be completed to achieve the final goal and describes who will complete each task and how long they have to do this.

Time lines

Time lines may be set by other people in your organisation, or you may need to develop your own based on your task requirements and deadlines.

A time line is a plan for how long a task will take to complete. To successfully meet these requirements, you need to define the scope of the document. To do this, you need to clarify who the audience is and exactly what the document is meant to say. Then you need to identify the tasks involved in producing the document. Next, work out how long it will take you to complete each task. By completing each task in the time you have allocated, you should be able to produce the document on time.

When developing a time line, you may need to factor in a number of things that are beyond your control, such as:

- waiting to receive information from several team members to be collated into one document
- ensuring that resources, staff and equipment needed to produce a document are available and are not in use by another department.

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 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 your professionalism in undertaking tasks. Make sure that when deadlines are being 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.

> **Tasks you may need to include in your time line:**
>
> - Clarifying the document's scope and audience
> - Researching the proposed content of the document
> - Accessing relevant information to include in the document
> - Writing the document
> - Formatting the document
> - Checking/proofreading the document
> - Incorporating feedback on the document
> - Printing and distributing the document

Practice task 12

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

Case study

Karen works as an administrative assistant. She has been asked to produce the organisation's newsletter. This is usually delivered in hard copy to internal and external clients.

The newsletter includes reports from a number of people in different departments. It also includes photographs and a report that must be written by Karen about the progress of a current project.

Karen makes a list of everyone who has to submit work for the newsletter. She informs each person about the work they need to submit and when it is required. She asks a colleague to take the necessary photos and have them ready one week before the release of the newsletter. Karen then has to write her report.

After that, she plans all of the tasks that still need to be done. She has to talk to colleagues involved in the project, draft and edit her report and collect reports and photos from colleagues.

Question 1

Explain why the newsletter needs a time line.

Question 2

Comment on Karen's planning. What do you think was good or bad about her planning?

Question 3

When a number of people are involved in the production of a document, what can go wrong?

Overcoming formatting issues

You will often experience difficulties when designing or producing documents.

The hardware you are using might fail or the software might crash. Whatever the problem, it helps to have a plan for dealing with the unexpected. Organisations deal with difficulties in a number of different ways; some might have manuals or training notes, others might have a help desk set up to aid employees.

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.

You can ask for help at any time by typing in details in the search bar at the top of the ribbon.

You can also press **F1** on the keyboard to access the help facility.
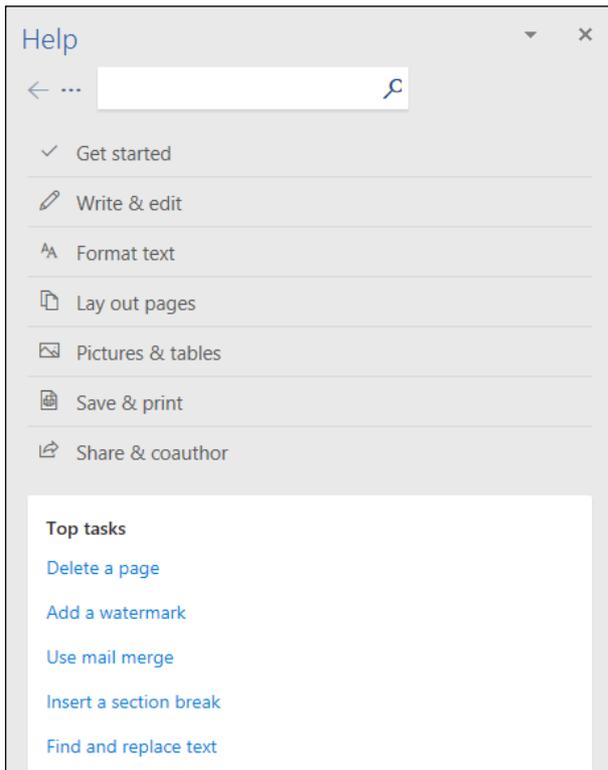
Other sources of help for solving problems with word-processing software include:

- referring to manuals and training booklets in your workplace
- accessing websites that offer advice on software use
- asking colleagues for help and advice
- participating in training courses.

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:
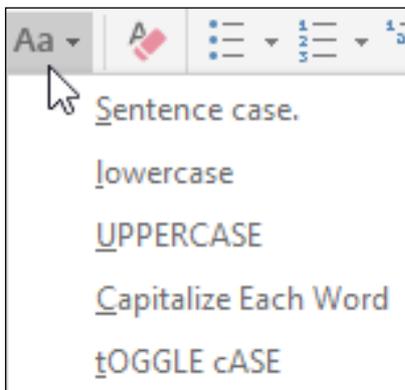
Help manuals and training materials

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 either print or electronic formats.

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 during your induction.

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

Interpreting error messages

Many word-processing software users struggle when faced with an error message that includes information they do not understand.

Here is a common error message. This error is often encountered when you have created a document with the paper size set to Letter and then attempt to change the paper size to A4 before printing.
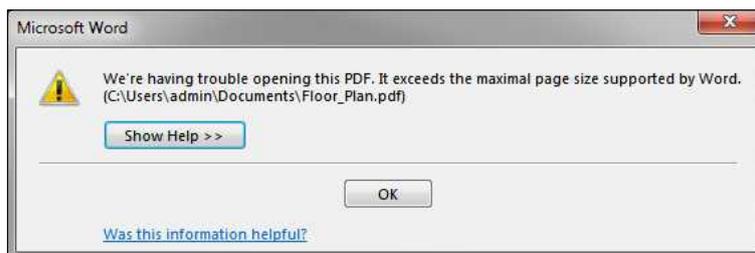
If you read the error carefully you can identify the settings you need to check to fix the problem. For example, you may need to adjust margins, column spacing or paragraph indents. By checking each of the settings and adjusting them as required, you should be able to fix the problem.

If you are unable to understand a message, you could search the internet for help. You can search on the Microsoft Office support sites or you can perform a general search using a search engine. Alternatively, you may decide to take a screenshot and send it to a colleague or the IT helpdesk for assistance.

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 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 drag the edges of the image in to focus on the issue.

Practice task 13

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

Case study

Damir is a personal assistant to the manager of a large organisation. One of his duties is to produce business documents using a variety of software applications. Damir often needs to use the Help function to assist him with formatting documents.

Sometimes Damir experiences software function problems that cannot be solved using the Help function, so he uses Microsoft's support website to find solutions. There is a manual available and he keeps an electronic copy in a Help folder on his desktop.

Question 1

Damir sometimes has a software functionality problem. Where does he go for help?

Question 2

What should Damir do if he is unsure what a particular icon does?

Question 3

Describe how Damir stores help manuals.

Question 4

Do you ever experience software problems while producing a document? Describe the steps you usually take to solve the problem.

3D | Save and print documents

An important task when creating documents is saving your work.

Saving the document ensures that you can edit or print it again when required. Each organisation has its own policies regarding naming and storing documents and it is important you follow these procedures so that you and other staff can access the documents as required.

You need to be careful when exiting your work and closing the document so there is no information loss or damage.

Most documents you create will be stored electronically. Occasionally hard copies (printouts) of the documents may be stored in the organisation's paper-based filing system.

Electronic file storage

Your organisation is likely to have an established system for naming electronic files to ensure all employees are able to find files when they are required.

Each organisation uses folder structures and naming standards to ensure that files are easy to identify and locate. If your organisation has a network, you may have shared directories and folders that several staff have access to.

It is important that you check your files and delete any that are no longer required on a regular basis to ensure the system remains efficient. If you are planning to have a clean-up of your files, check with your supervisor before you delete any; in particular, check which projects or clients you need to keep files for. You should never delete or move files created by another employee without their permission.

Organisations usually perform regular backups of shared directories and folders. In larger organisations, a staff member from the IT department will usually be responsible for this. If you are planning to delete a lot of files, it may be a good idea to perform a backup of the files (which can be kept before deleting them).

Advantages of using shared directories and naming standards

- Files are easy to find.
- A document can be accessed by multiple employees, and can be completed in an employee's absence.
- Work is less likely to be duplicated as staff can check to see if a document has already been created.
- Files stored in shared directories are normally backed up on a regular basis.
- Shared directories can have different permissions set, such as read-only.
- Virus scans are normally run on shared folders on a regular basis.

Folder structure

Folders generally have a treelike structure that branches from a parent directory to sub-folders in a hierarchical structure.

In the following example, the server has three folders for three separate workgroups:

- Group A
- Group B
- Group C

Group C has three major folders:

- Procedures
- Personnel
- Projects

The Projects Folder has three folders:

- Project A
- Project B
- Project C

The Project C folder has two documents:

- 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 the ProjectC_timelines.doc the file path is: C:\GroupC\Projects\ProjectC\ProjectC_timelines.docx.

SERVER (C DRIVE)

```
|_____ Group A
|_____ Group B
|_____ Group C
                |_____ Procedures
                |_____ Personnel
                |_____ Projects
                                |_____ Project A
                                |_____ Project B
                                |_____ Project C
                                                |_____ ProjectC_timelines.docx
                                                |_____ ProjectC_research1.docx
```
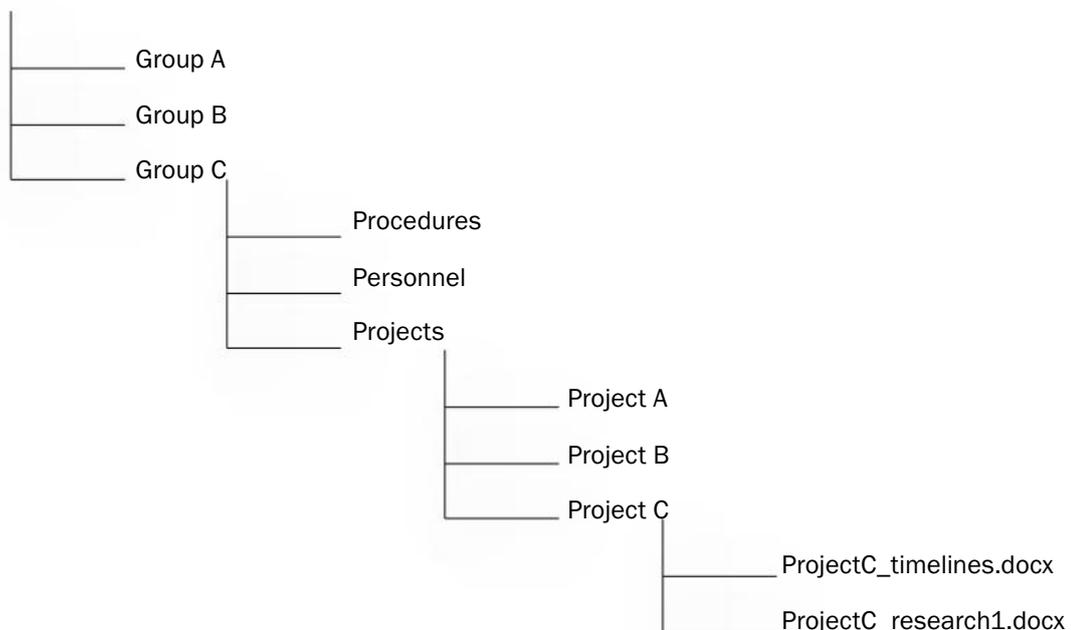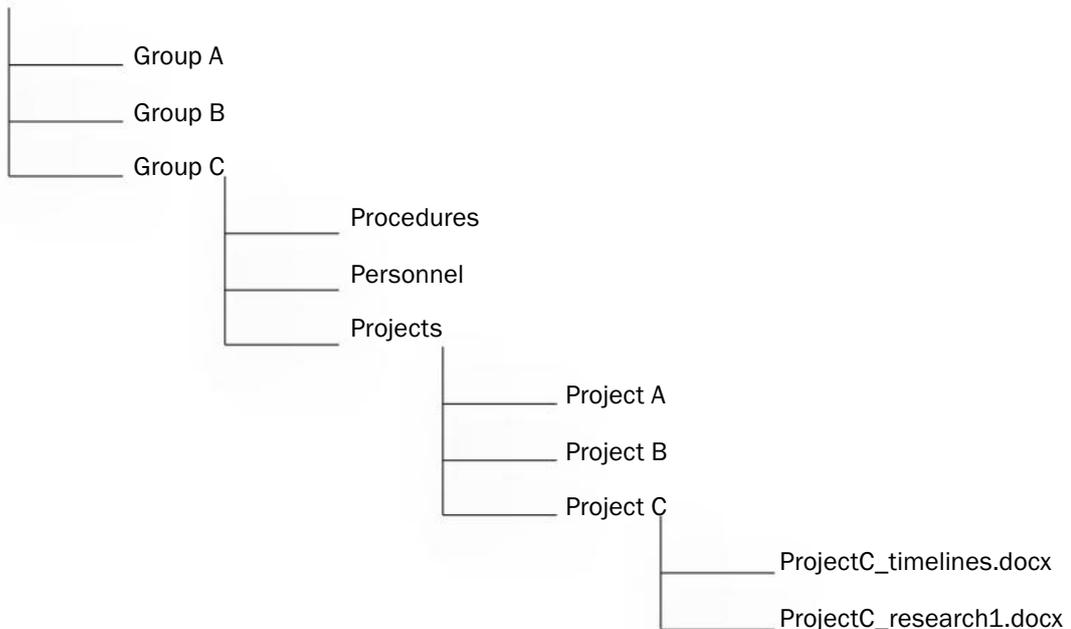
Practice task 14

Part A

Look at the following folder structure. Imagine that you belong to Group C.

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

Question 1

You want to add another time line document for Project A to your shared directory. Write out the file path you would use to place it in the correct location. Decide on an appropriate name for the document.

Question 2

Describe **four** advantages of using a shared directory.

Part B

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

Case study

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 1

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

Question 2

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

Question 3

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

Print documents

There is a range of options available when printing documents.

Print preview allows you to view a document as it will appear when printed.

To view print preview, select the **File** tab and click **Print**. The print preview will be shown in the right panel. You can use the zoom bar to zoom in or out on your page, or to view several pages at once.

Once you are happy with the final version, you can select **Print**.
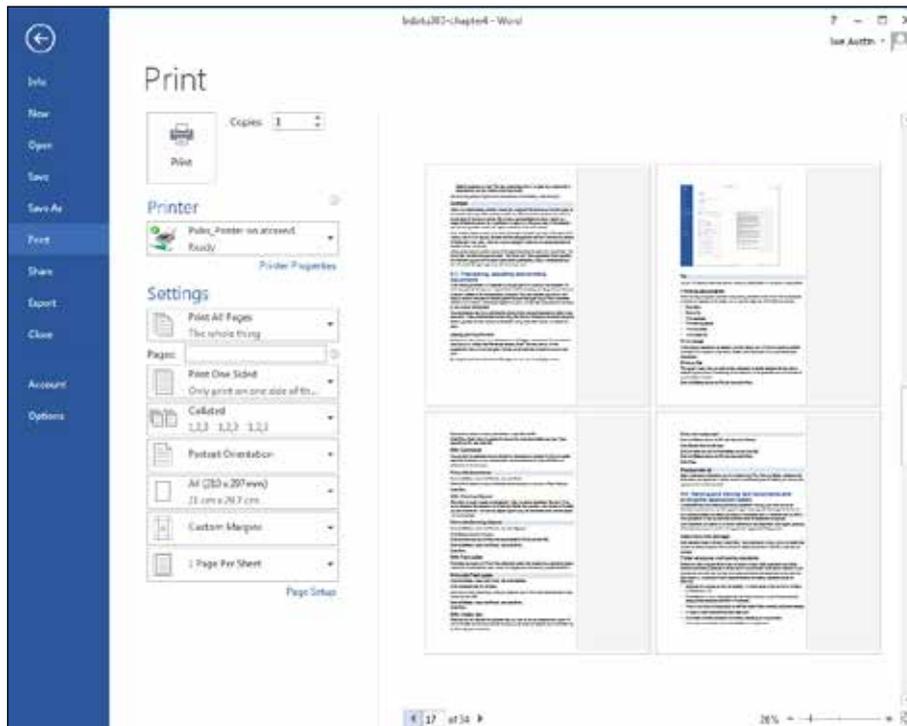
Hard-copy storage

Many documents stored digitally are also stored in hard copy as a safeguard against a computer system failure.

Hard-copy storage requires physical space. It also requires a filing system that uses consistent, simple and meaningful names similar to those used in digital storage.

Managing hard-copy documents is necessary to efficiently use storage space. Retention schedules are used to determine which documents need to be kept and for how long. Documents without permanent value may be scheduled for eventual destruction. However, be aware that some documents need to be retained for legal reasons; for example, taxation details need to be retained for at least six years.

The following is an example of a retention schedule.

Retention schedules for hard-copy documents	
Credit card receipts and statements	2 years
Tax records	6 years
Accounts records	6 years
Invoices	1 year
Client correspondence	2 years
Unsolicited CVs	6 months

Network/operating system logons

Passwords are commonly used in organisations to ensure that only authorised users are able to access files.

Most organisations have networks made up of more than one computer. Before employees can use a computer that is connected to the network, they must be issued a logon username and password, which identifies them and allows them to access the files on the network.

Employees can be given access to shared drives and directories or to individual files and folders.

You should change your password on a regular basis and ensure you do not tell anyone what it is. Your password should not be anything that can be easily guessed by other people, such as your date of birth, name, or names of family members and pets. Good passwords contain a mixture of letters and numbers and are six to eight characters long.

Depending on the network configuration, you are likely to have a personal drive for your files along with access to various shared drives. Where information contained in files is sensitive and not to be viewed by all employees, you can save it on your personal drive or apply a password to protect an individual file. Two levels of access can be applied:

- a password to open the file, which allows the file to be viewed or printed
- a password to modify the file, which will let the user make changes to the file.

You can let any other person who needs to access the file know the password.

To apply a password to a Word file, select the **File** tab and click **Protect Document**, and choose one of the options from the drop-down menu.
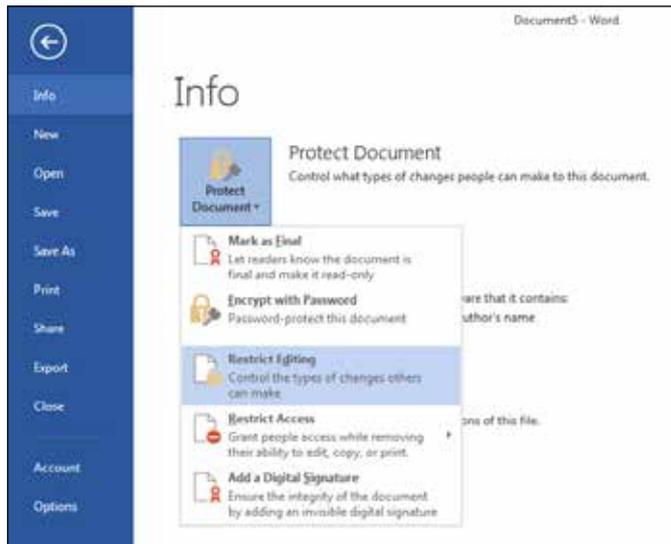
Select how you wish to apply restrictions, then click **Yes, Start Enforcing Protection**.

A pop-up box will appear where you enter and re-enter a password. Click **Save**.
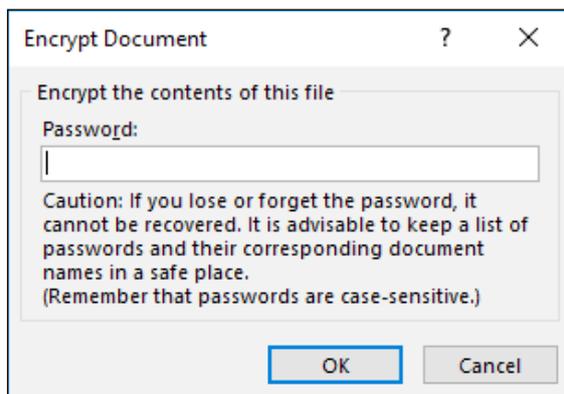
Prevent data loss

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 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 15

Read the case study, then complete the question that follows.

Case study

Leigh works as an office administrator for a large organisation. Her daily tasks include modifying documents in a variety of software applications. One day she had to modify three documents in three different applications.

Leigh opened all three files before starting work. While working on one document, she went on coffee break, leaving all three applications open. When Leigh returned, she found that her computer was slower than usual and then it started to make unusual noises. Soon after, Leigh's monitor went blank.

Describe the mistakes Leigh made when modifying her documents.

Summary

- Use advanced software functions to produce documents efficiently.

- Import text and data from other documents and software applications to save time.

- Editing ensures that the document is grammatically correct, has an effective design and meets organisational requirements.

- A checklist is often used to help people systematically go through all the points that need to be considered when editing a document.

- A time line sets the schedule for a task or project. It gives details of each task that needs to be accomplished to achieve goals.

- Use online and paper-based manuals and other training materials to overcome problems with document design and production.

- Most organisations have folder structures and naming standards. This allows users to set up folders quickly and easily.

- Hard-copy documents need to be kept and archived, or destroyed after the appropriate period of time.

- Make sure you exit applications without causing damage or data loss.

Learning checkpoint 3
Produce digital text documents

Part A

You work for Plant Paradise. The business does not currently have any templates and you have been given the following tasks to complete.

1. Design a template for a promotional flyer with the following details.

    Plant Paradise

    124 Sunhill Street, BUDERIM QLD 4556

    Ph: 07 5423 9912

    Email: inquiries@plantparadise.com.au

    Website: www.plantparadise.com.au

2. Use a suitable image as part of the header.

3. Ensure the paper size is A4 and set the top and bottom margins to 1cm and the left and right margins to 2cm.

4. Save the template as 'Plant-Paradise-flyer'.

Part B

Read the case study, then complete the task that follows.

Case study

You work for Johnson's Motors, a car dealership that sells and services Toyota and Suzuki vehicles. A new computer system has just been installed and you have been asked to create a folder structure that will meet their needs. It is important that they keep the information for Toyotas and Suzukis separate. They need to store the following information for each make of vehicle:

- Sales
- Servicing
- Marketing

You also need to store electronic files on employees, advertised positions and accounting data.
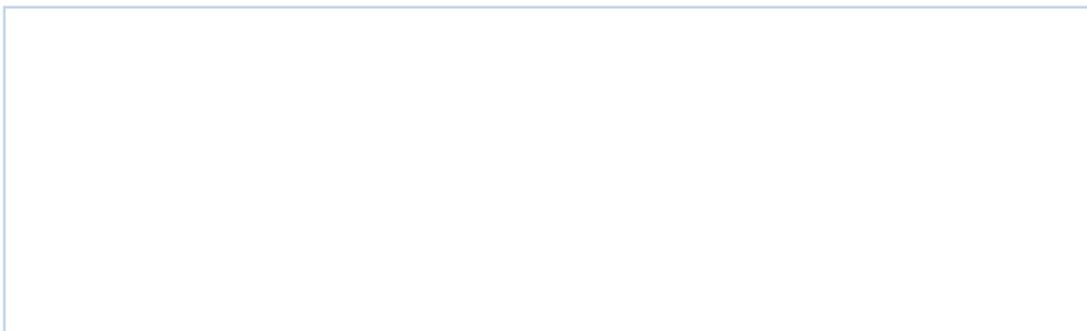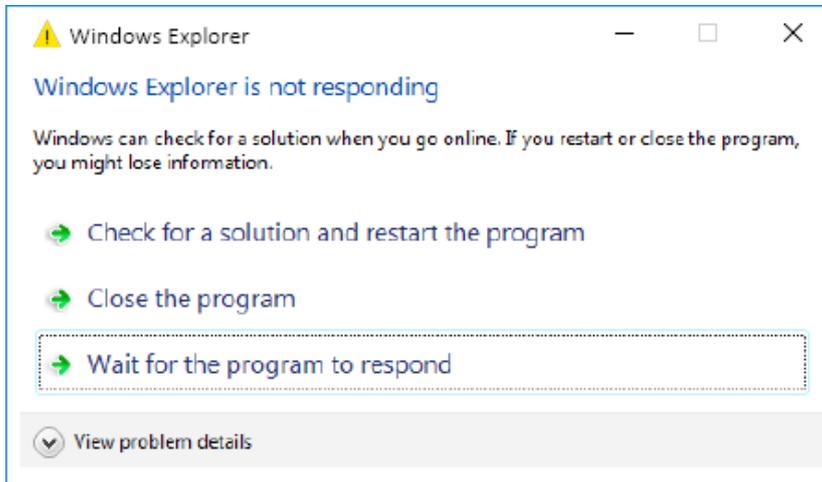
Design a folder structure to suit Johnson's Motors. Make sure you choose names that are consistent, simple and meaningful.

Part C

Below are some sample error messages for Office 365 or Word 2016.

Research using the internet to provide a brief explanation of what each error message means and what can be done to fix it.

a)

b)