BSB 7.0

BSBWRT411

WRITE COMPLEX DOCUMENTS

Aspire Learning Resources

BSBWRT411

Write complex documents

Release 1

Learner Guide

Aspire Version 1.1

Learning Resources

Aspire also has learning resources available in these areas:

- Foundation skills
- LLN and employability skills (non-competency)
- Community services
- Early Childhood Education and Care
- Allied health

BSBWRT411 Write complex documents, Release 1

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Before you begin

This Learner Guide is based on the unit of competency *BSBWRT411 Write complex 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.

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 key 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.
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 provides definitions for each foundation skill.

Foundation skill area	Foundation skill description
Reading	▪ Interprets a variety of text to determine and confirm task requirements ▪ Proofreads document checking for grammar, spelling, structure, and suitability of style and format for audience
Oral Communication	▪ Uses listening and questioning skills to seek additional information or confirmation of task completion
Self-management	▪ Follows accepted communication practices and protocols when seeking information or feedback from others ▪ Takes responsibility for planning, sequencing and prioritising tasks to achieve required outcomes
Technology	▪ Uses the main features and functions of digital tools to complete work tasks

What do you already know?

Use the following table to identify what you may already know. This may assist you to work out what to focus on in your learning.

Topic	Key outcome		Rate your confidence in each section
Topic 1: Plan complex documents	1A	Identify the purpose of the document and the target audience	❑ Confident ❑ Basic understanding ❑ Not confident
	1B	Identify document requirements	❑ Confident ❑ Basic understanding ❑ Not confident
	1C	Establish the method of communication	❑ Confident ❑ Basic understanding ❑ Not confident
	1D	Organise information logically and develop a document overview	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 2: Draft complex document	2A	Confirm information is cohesive and develop a draft	❑ Confident ❑ Basic understanding ❑ Not confident
	2B	Identify gaps and add information into a draft	❑ Confident ❑ Basic understanding ❑ Not confident

Topic	Key outcome	Rate your confidence in each section
Topic 3: Finalise complex documents	3A Review draft text for accuracy	❑ Confident ❑ Basic understanding ❑ Not confident
	3B Confirm approval for draft text	❑ Confident ❑ Basic understanding ❑ Not confident
	3C Incorporate amendments	❑ Confident ❑ Basic understanding ❑ Not confident
	3D Choose design elements	❑ Confident ❑ Basic understanding ❑ Not confident
	3E Check the final document	❑ Confident ❑ Basic understanding ❑ Not confident

Topic 1 | Plan complex documents

1A Identify the purpose of the document and the target audience

1B Identify document requirements

1C Establish the method of communication

1D Organise information logically and develop a document overview

1A Identify the purpose of the document and the target audience

The first step in planning your document is to understand why you are preparing it.

The information you gather will help you decide on the format, style and structure of your document.

If you are being briefed by your manager or another staff member, ask them questions about the document: how it will be used, its intended audience and primary objective. Also ask about any relevant policies or procedures you will need to ensure you can develop the document in line with organisational requirements and specifications.

This will help ensure your document fulfils the organisation's expectations. It also makes the process more efficient by reducing the need for amendments at a later stage.

The purpose of documents

Your organisation will produce a range of documents for different purposes depending on its business. These could include reports, quotes, training materials, summaries of research, strategic proposals, funding requests and government submissions.

Here are examples of the different purposes that documents can have.

Convey research findings

Your organisation may research an issue relevant to its activities, such as customer attitudes. You may need to produce a report that summarises this information for other employees. Understanding how the research findings are applied helps determine what information should be included about the research objective, the method used, the findings, conclusions and any recommended actions.

Document policies, procedures and processes

Organisations need to develop policies, procedures and processes to guide staff. It is important to understand the range of topics they cover. Policies and procedures need to be accessible to staff and kept up to date. They may have a different look if, for example, they are accessed from the intranet for reference or in hard copy for training. When developing policies and procedures, you may also need to comply with auditing requirements, such as International Organization for Standardization (ISO) requirements or work health and safety (WHS) standards.

Influence attitudes, opinions and beliefs

Many types of documents seek to influence the reader; for example, persuasive letters, and marketing or promotional materials. Understanding your audience is particularly important for these types of documents.

Meet legal requirements

You may need to document a standard policy for your organisation to ensure you meet legal requirements, such as an equal opportunity policy or WHS procedure. The requirements need to be thoroughly researched to ensure correct and relevant information is captured.

Propose recommendations, options and actions

Your role may need to develop a business proposal. The purpose of these documents is primarily to give management information that allows highlights potential risks and concerns and allows them to make an informed decision. The level of detail needed will depend on the scale of the proposal and the forum in which it will be presented. Referring to an existing business report is a good way to see the layout and model for the structure of your document.

Provide data or information

Periodic reports, such as sales reports or progress reports on a large project, may need to be produced regularly. When you are planning this type of document, you will need to research where the information is going to be presented, whether it will be reviewed in advance, and who the audience will be. It may need visual information in the form of graphs or charts to illustrate a trend or movement.

Identifying the audience

When defining the purpose of a document, consider the intended audience – who is going to be reading the document? The target audience could be internal (in your organisation), external (outside your organisation) or both.

Sometimes the intended audience for a document is clear from its purpose. For example, a strategic proposal may be intended for the board of directors, while a quarterly sales report may have a much wider audience including the sales manager and other senior staff.

Find out much as you can about the audience by asking questions.

How knowledgeable is the audience about the subject matter?	This will help you decide what content to include, such as definitions of key terms, and the level of detail to include.
What style of document do they prefer?	This will help you decide the best method of communication.
What is the literacy level of the audience?	This will help you decide the type of language you use and the level of detail to include.

Another way of clarifying the purpose of a document is to consider the purpose from the user's point of view. What will the audience use the document for? For example:

- instructions for staff on how to correctly use a piece of equipment
- the various options comparing a number of quotes for senior management
- a list of the benefits of a service to its customers
- directions on where to find saved files and documents on a topic.

Organisational requirements

As mentioned, you can clarify the details of your task by asking for a brief or overview from a manager or the person who allocated you the task. You may be able to deduce the organisational requirements of a document from previous examples. For example, someone may have already produced a similar type of document. Review those documents or ask the person who created them about the requirements.

Make sure you access the business's relevant policies or procedures on written communication. This may include guidelines/steps for how to:

- use logos, house style and style guides and templates
- access and share confidential or commercially sensitive information from password-protected folders
- respect the rights of people to keep certain information private and not shared with others

- cite and reference someone else's ideas and information including intellectual property
- save and store documents so that others can find them
- follow cyber security practices and use social media responsibly
- proofread or check documents before they are published or sent to people such as customers
- maintain version control and file naming protocols.

Document formatting, style and structure are covered in the next section.

Example

Determine the purpose and audience

The following example explains the value of taking time to clarify the purpose of a document.

Simon works in the sales department of a corporate uniforms company. The company has been asked to prepare a submission to provide new uniforms for a chain of automotive repairers. This potential client has requested that the company presents a range of options, together with design costs and costs per uniform, at a presentation in three weeks time. Here is how Simon determines the purpose of the document he needs to prepare.

Seeking clarification

This is a big opportunity, as this potential client is a growing chain, and therefore represents a lot of potential business. Simon takes the request for tender to the sales manager, Hank, and asks if he can prepare the submission. Hank agrees, asking Simon to submit a plan before finalising the submission. As it is potentially a big client, Hank will deliver the presentation, but says Simon should also plan to attend the meeting.

Document planning

Simon begins planning the document. He knows that this potential client will have asked a number of other suppliers to prepare a submission, and thinks that he not only needs to have competitive pricing, but that he also needs to persuade the purchasing officer that they are the best organisation to work with. The purpose of the submission is to win the business. This means that Simon needs to convey all the necessary information about the design of the uniforms, price per item and the quality of materials as persuasively and professionally as possible.

Practice Task 1

Question 1

List three types of business documents. Select one type of document and explain its potential purpose.

Question 2

Identify two factors about the audience that would influence the way a document should be developed.

1B Identify document requirements

The format, style and structure of a document determine how it is presented.

The format, style and structure of your document might be determined by existing organisational requirements. These might be referred to in a policy document and outlined in detail in a procedure for written communications. For example, your company may have a procedure that refers to the use of a 'house style'. Your company may also have a communications policy which addresses things like messaging and the use of logos in documents.

- Format refers to how information is laid out on the page and incorporates features such as fonts, font size, spacing, margins and text alignment.
- Style refers to a standard way of presenting information, such as the use of a specific letterhead, corporate colours, logos, footnotes and citations.
- Structure refers to how a document is organised, such as the different sections of a document (e.g. executive summary, introduction, discussion, conclusion, appendices) and where those sections are placed in the document.

House style

A house style is specific to an organisation and governs how a document is presented, such as the colours and fonts used, the placement of logos, use of corporate colours and signatures in emails.

House styles (also called brand guidelines) ensure consistency across an organisation. They can also make work more efficient because the structure of the document has already been decided and agreed; for example, if a group of people in your company review the same type of document regularly, there should be few decisions they need to make about presentation style.

Templates can be used with in-built formatting settings for features such as headings, footnotes and margins. Some organisations have templates for documents such as reports, presentation slides and reports.

There will likely be a procedural document that outlines the process for using the house style document and templates and when and where they should be used and where they are located.

Here are some examples of the features that may be included in a template.

Headings

Headings are used to introduce a segment of text. They are useful for organising information and for creating a summary of the overall document content.

Fonts

There are many different fonts or typefaces that can be used in documents. While a mixture of fonts is usual in a document (for example, a heading is styled differently to the body text), too many different fonts can make the document difficult and confusing to read.

Bullets and numbering

Bullets (dot points) are used to outline lists or processes. Using consistently styled bullets makes a document easier to follow.

In addition to a house style, your organisation may also have a style guide, which gives general guidance on how text should be styled and presented.

Style guides can include guidelines on any of the following:

- effective and inclusive language
- grammar
- spelling and punctuation
- capitalisation
- textual contrast
- abbreviations
- numbers and measurement
- citation methods
- copyright.

Example

Identify document requirements

The following example is an extract from an organisation's style guide instructing employees to use dot point lists.

Bullets, rather than numbers or spaced hyphens, are used to list points.

A colon or full stop should introduce the points; a colon is preferable because it links the lead-in sentence with the list that follows.

Consider the following guidance.

Full sentence lists

If each bullet point is a full sentence, and does not complete the lead-in sentence, the points should begin with a capital letter and have a full stop at the end of each.

For example:

The board made the following recommendations:

- All staff should have six weeks holiday a year.
- All salaries should be increased by $8,000, effective immediately.

Run-on lists

If the list comprises part of an overall sentence (a run-on list), begin each point with a lower-case letter and complete the list with a full stop (or a question mark if the list is part of a question) if the list completes the lead-in sentence. For example:

Kim wanted Kevin to:

- research
- study
- practise.

Do not use punctuation after each bullet point in a run-on list.

Content requirements

Depending on the type of document you are writing, there may be specific content you need to include. For example, annual reports for large companies generally include a financial summary, financial reports, a letter to shareholders and information on company operations.

There may also be content you need to *exclude* from your document. For example, if you are presenting information about new software to senior management, you may need to leave out technical information that they do not need to know and may not understand.

Some documents need more detail than others. The level of detail is determined by the purpose, audience and method of communication. A brief oral presentation, for example, may need less detail than a training manual. The supporting document may only need the key concepts covered by dot points because the presenter just needs prompts when discussing the slides in a PowerPoint presentation.

Here is a list of some other requirements you may need to consider in the content of documents.

Organisational content requirements

Your organisation may have standardised content that needs to be included in certain documents.

For example, your organisation may require that a quarterly presentation about business status includes:

- an Acknowledgment of Country
- a welcome to new employees
- a financial summary from each department
- a list of key achievements
- recognition of long service awards
- a summary of market changes.

Organisational policies and procedures

Your organisation may have policies and procedures which govern the content to include in a document. For example, there may be a policy about including content about WHS in training manuals to ensure they comply with WHS guidelines or incident reports that capture the relevant details after an accident.

Reporting requirements

Your organisation may have made some commitments about the type of reporting it will do, perhaps to achieve a certain external certification, or as part of a public commitment. If your organisation is ISO certified, it will need to maintain standards of documentation as part of the certification. Some government contracts require that suppliers comply with regular milestone reporting, which must follow a specified structure.

Legal requirements

You may need to follow specific legal requirements when writing documents.

For example, promotional material often requires disclaimers that give specific information about availability or product features, to ensure compliance with consumer standards. Some external documents may be subject to legal review before they are circulated.

It is important to clearly understand any legal requirements you need to follow when writing your document, as not following them may have adverse consequences.

Here is a list of factors to consider before developing your document.

Plain English Regardless of the purpose of a document or its audience, you should use the principles of plain English.	▪ Use active rather than passive language; for example, 'John wrote the document' rather than 'the document was written by John'. ▪ Use inclusive language; for example, use 'they' rather than 'he' or 'she' and avoid discriminatory language. ▪ Use short sentences with one main point. ▪ Vary sentence and paragraph length to improve readability. ▪ Avoid repeating content unnecessarily.
Document length Knowing the expected length of a document will help you determine which content to include and the level of detail required.	There may be a word or page limit. Here are three examples: ▪ Promotional materials may need to be one page to minimise printing costs and business cases may need to be presented on a single A4 page. ▪ If you need to produce a research report that is three pages long, you may need to focus on key findings and include minimal details about methodology. ▪ For a document that is going to be presented orally – such as a speech – the time available to deliver the presentation will help you determine the content and level of detail.

Deadline You will usually be advised of the deadline for your document.	You should understand what this deadline means and plan the tasks you will need to perform to meet the deadline. This could include: ▪ gathering source information ▪ receiving internal approvals ▪ obtaining legal approvals of final text ▪ editing and proofreading ▪ formatting of documents ▪ printing of documents ▪ distributing documents. For example: printed promotional materials have a reasonably long lead time. If the deadline you are given is for the date of distribution to the end customer, then you need to develop interim milestones and contingencies to ensure you meet this date.
Referencing References are used to acknowledge the sources of information that have contributed to your work.	Plagiarism involves using someone else's work without acknowledging it and presenting it as your own. The consequences of plagiarism include potential breaches of copyright laws and reputational damage. Organisations can have quite specific referencing requirements. For example: ▪ Data published by another company or organisation needs to be referenced. ▪ References can be listed in a bibliography at the end of a document or they can be cited in the endnotes or footnotes of a document. The Harvard (author–date) style or the Oxford system are commonly used methods. ▪ Acknowledgments are used to recognise people known to the author who have helped them produce a document, such as a colleague or mentor.
Navigational tools Complex and lengthy documents often include numerous sections, tables and figures.	Tools such as a table of contents, an index and a list of tables or figures can help make these documents easier to navigate. Microsoft Word has several tools that allow you to create a table of contents, label sections, figures and tables and automatically update page numbers.

File types and sizes Documents published online often have specific file requirements. In general, these requirements relate to file size. If a file is too large, it may take a long time to load on a website.	Examples of common online file types: ▪ JPG files are used for displaying photos online. A medium-quality JPG file will have good colour and clarity but not be too large. ▪ Portable document format (PDF) displays large files, generally created in another application, as smaller file size documents with no editing function. PDFs are created in Adobe Acrobat. ▪ TXT files are compact and widely compatible files used where complex formatting and graphics are not required. ▪ Zip files are files of various types that have been compressed using WinZip. This application is also required to unzip the files before they can be opened. ▪ Other document file types commonly used include Microsoft Office suite and RTF (rich text format) files. ▪ Microsoft provides a reference for the use of file extensions so you can recognise the type of document used: aspirelr.link/microsoft-file-format-reference
Artwork requirements Graphics, photographs, illustrations, charts, maps and other visual features can be used in a document to explain or accompany written material.	Depending on how your document is going to be distributed, you may need to collect visual content in different formats. For example: ▪ Some software applications have specific requirements for visual content. ▪ Professional printers may have requirements about image resolution.

Example

Identify document requirements

The following demonstrates how a team member determines timing requirements for a submission.

Simon reviews the request for tender from the chain of automotive repairers. There is a section in the request that specifies that they must give information including the design cost, cost per uniform at various volume levels, range of uniform sizes and materials used in each type of uniform. Simon must also include delivery lead times for initial and subsequent orders and the exclusive use of colours for the potential client. Simon decides that he will adopt this structure for his submission.

Simon has to get his plan and schedule to his manager for review within the next couple of days if he is going to get the document submitted in time. He is getting worried because the production manager is often slow at providing information.

Practice Task 2

Question 1

What is the difference between a house style, a style guide and a template?

Question 2

Draw a line to match each term about documents to its definition.

» Style	» Describes how information is laid out on the page and incorporates features such as fonts, font size, spacing, margins and text alignment
» Format	» Refers to a standard way of presenting information, such as the use of a specific letterhead, corporate colours, logos, footnotes and citations
» Structure	» Is how a document is organised, such as the different sections of a document (e.g. executive summary, introduction, discussion, conclusion, appendices) and where those sections are placed in the document

Question 3

Which of the following requirements need to be clarified before beginning to develop a document? Tick all that apply.

- ◯ Standardised content that needs to be included
- ◯ Legal requirements for submitting milestone reports
- ◯ The length of the document such as a word limit
- ◯ Organisational procedures for developing documents such as style guides and templates
- ◯ The preferred method used for referencing
- ◯ The filing and version control requirements for finished documents

1C Establish the method of communication

You must understand who your audience is and the intention of your document to determine the most effective and appropriate method of communication.

Business letters

Business letters can vary from simple to formal and quite complex. They are used when evidence or a record of business activities is needed. They also give a personal point of contact between your organisation and its clients. For example, a letter may be used as a legal record of an agreement between two parties or it may document the details of a dispute.

There is a set of communication protocols that are applied when preparing a business letter. Most organisations use what is called a fully blocked layout. This has the entire letter (including the address) aligned on a left margin and has single spacing between lines and a double space between paragraphs. Sometimes the punctuation is open. That means there is limited punctuation outside the wording of the letter itself. Some organisations use a mixed punctuation style, which means they place a comma after the greeting and the close.

Letters are always written on letterhead, whether in hard copy or in an electronic format such as PDF that can be attached and sent via email.

replace with LOGO

Date 21.08.20

Street address

Dear ,

Write the body of your letter here. To update any of the information in this letter, simply click and start typing!

Want to customize your color palette? Just go to the Design ribbon and select Colors from the list. If you choose a color palette that you like, the colors of the header images will update. Make the document yours!

Want to change the fonts that are used? That is just as easy to update. Just go to the Design ribbon and choose Fonts from the menu options. You can use a built-in font combination or choose one of your own.

Double click in the header to change out the logo placeholder. Double click in the footer to update the contact information.

Warm regards,

Name Here

Your Title

[Phone]

[Email]

[Website]

[Fax]

Business reports

Business reports are used to distribute detailed, sometimes complex information to a wide audience. Some of the many types of reports include sales performance, customer satisfaction survey, feasibility study, research result or annual report. Reports may also be used to document the results of an activity, such as a research project or a report about a visit to customers in a particular area. Reports may be written for an external or internal audience and often need to be prepared in a specific format as indicated here.

External reports

Large companies may publish their annual reports, and some other reports, externally. These reports will almost certainly follow a template, which will guide the content and appearance.

Internal reports

Internal reports may also have templates. For example, if each region is producing a sales report, it is much easier for management to review and compare them if they are all presented in a similar way. It is also easier for staff to prepare them if there is a structure to follow.

Report formatting

Use headings, numbering, graphics, tables, lists and other devices to help make details more readable. It is easier to digest information presented in several different ways rather than as 10 pages of solid text. It is also important to present an executive summary of the key findings at the start of the report.

Emails

Emails can be used in a similar way to business letters. They are generally used for less formal correspondence and are usually not used where a formal or legal record is required. However, emails can be used as records or evidence in any dispute, so you should apply the usual level of care as with any other document. They also represent the business's brand so need to be professionally worded and proofread for clarity and correct spelling.

Advantages of email

Emails have advantages over letters, including the ability to do the following:

- send electronic attachments
- deliver correspondence more quickly and cheaply
- send correspondence to multiple recipients at the same time
- track receipts.

Considerations when using email

Remember to consider the file size and type of an attachment before sending it. When sending a large file, it is a good idea to send a separate email to confirm the file has been received.

Make sure you supply the file in the correct format so that the recipient can access it.

Follow similar organisational requirements as you would for a letter, such as using the standard layout or including a marketing message or a confidentiality clause in the signature block.

Protecting privacy and maintaining confidentiality

A standard email displays all recipients in the 'to' and 'cc' fields. If you are copying in your manager, it is courteous to use the 'cc' field to inform other recipients. If you are sending emails to an external group, such as a customer newsletter, you may use the 'bcc' field to protect your customers' privacy and hide the other recipients, or you could use an email marketing service that does all this for you.

Take care when sending confidential information by email, particularly with sensitive business or customer details. For this information, you may need to use encryption or password protection. Follow your organisation's policy on what can be sent.

Procedural documents

Procedures use written communication as well as visual material to convey important information.

Standard work instructions and manuals

Business procedures are sometimes documented to conform to external requirements, such as ISO procedures, and you may be required to follow a template to satisfy audit requirements. This is often the case for manuals about WHS or equal opportunity policies.

Training materials

If you are developing training material, check if your organisation has a standard template. This may cover layout and presentation but may also influence the time allocated to each session before breaks are required, and other structural elements.

Presentation of procedures, manuals and written instructions

How the material is presented will influence the format of procedures, manuals and instructions. Presentation materials that accompany face-to-face or online training may be less detailed and structured differently than materials reviewed independently by learners.

Organisational procedures

The key to strong procedures is understanding how the people who use the documents perform the documented activities.

Procedures help to ensure there is accountability, compliance, consistency and quality. Having a procedure will save time in the completion of tasks.

Procedures are the steps that outline how to achieve the commitments and expectations set out in the policy statement. Procedures describe what is required to complete a task or produce a product or service. Writing a procedure often requires several drafts to ensure all of the details and tasks are included and clear to the reader. Having the input from people who understand the task is essential to achieve accuracy. Ask people with experience in the task to read and review a final draft.

In business, procedures can relate to many different activities that occur in a range of processes and functions. Here are a few examples:

- Saving, storing and sharing document
- Preparing an email to customers and suppliers
- Taking and recording minutes of a meeting
- Processing staff payroll
- Instructions on what to do in case of an accident or to ensure a task such as manual handling is done safely or your office workspace is set up correctly
- Recruitment and conflict resolution
- Managing stress and mental health.

Meeting agendas

An agenda gives the chairperson control over the flow of discussion, the issues covered and the attendees responsible for reporting on or sharing specific information at the meeting. An agenda can also help keep the meeting within a predetermined time frame, controlling when issues are discussed.

The agenda contains a list of meeting activities, in order, starting with the opening/call to order and ending with the meeting's adjournment. It commonly forms part of the meeting notice or is attached to it, so members receive all the necessary details at once.

If members are notified of the business to be conducted at the meeting, then the meeting must be confined to dealing with those matters. Any new agenda items raised during a meeting should be put on the agenda for the next meeting. This allows members time to consider matters properly and avoids disadvantaging members who are not in attendance at the meeting and therefore unaware of the new business.

When writing a meeting agenda:

- clearly state the meeting purpose
- detail the issues to be discussed
- prioritise the order in which things are best discussed so the meeting outcomes can be achieved
- define a time frame for each issue to be discussed
- structure as a guide to prepare invitees and control the proceedings.

Software features

The ability to use technology and digital tools is essential for almost all methods of communication.

The features and functions of various types of software will help you produce a professional, functional and well-presented document. You will most likely be familiar with the most common software applications. Many organisations use the Microsoft Office suite, including Word, Excel, Access and PowerPoint. Other applications may include Adobe FrameMaker or InDesign.

Word-processing applications have a vast range of useful features for formatting, layout and design. They can be used to create a table of content, index and heading hierarchies and for this reason are one of the most common applications used in business settings.

Of course, for some documents, alternative software is more appropriate than word-processing software. Desktop-publishing software, for example, is better for promotional materials and brochures.

Here is a description of some of the most common software applications used to produce documents.

Microsoft Word

- Word-processing application
- Used to produce text, or text and some imported graphics/tables
- Used for business letters, manuals, instructions, procedures, reports and speeches

Microsoft Excel

- Spreadsheet program
- Used to calculate and present figures and graphs
- Used for reports, client and product details

Microsoft Access

- Database application
- Used to manage detailed analyses
- Used to input data such as client and product details

Microsoft PowerPoint

- Presentation program
- Used to visually present information and notes for distribution
- Used for presentations using projector and as accompaniment to speech

Microsoft Outlook

- Email program
- Used to send emails, manage contacts and calendars
- Used for business emails

Microsoft Publisher

- Desktop-publishing program
- Used to create materials requiring a mix of text and graphics
- Used for promotional materials

Adobe InDesign

- Desktop-publishing program
- Used to create materials requiring a mix of text and graphics
- Used for promotional materials

Adobe FrameMaker

- Desktop-publishing and word-processing program
- Used to create materials requiring word processing and a mix of text and graphics
- Used for promotional materials, reports, manuals, instructions, procedures

Tips for developing documents

Many readability principles apply consistently throughout different software applications. These are features that make a document easier for the reader to follow.

The following list may vary from the software application on your own system or what is used in your workplace. For the purpose of this discussion the following refers to Microsoft Office but may vary according to the version used at your workplace.

Capital letters and font

Add words that must have capital letters to the dictionary. Use AutoCorrect settings to prompt for incorrect use of capital letters.

Select fonts from the drop-down menu, usually in the Home or Font toolbar.

Headings

Use preset heading styles or customise your own in a document, then save it as a template.

Use cross-reference tools from the Insert toolbar to refer to earlier sections if you have used heading styles. This will automatically update if you change numbers. It will also automatically create tables of contents, lists.

Illustrations and photographs

Use Insert toolbars. Use 'paste special' function to copy from other Microsoft applications. Choose the file type carefully to minimise impact on overall file size.

Use Picture toolbars to crop or adjust layout. Use captions to label images, which can be numbered and linked with section headings. This allows you to use cross-references that will automatically update and also create tables of contents.

Justification, alignment, margins and paragraph indentation

For justification, select text and choose from paragraph settings. Use Page Layout tools for creating columns. Columns may need section and column breaks.

Use Margins tools for adjusting margins, and Paragraph for formatting paragraphs. Use the Insert toolbar for adding break-out boxes and other shapes to your document.

Page orientation and size

Use Page Layout tools for page orientation. Can usually also be accessed from print preview or file menus.

Use Page Setup tools for page size. Can usually also be accessed from Print Preview menus.

Lists and tables

Use Paragraph for choosing or customising bullets; also, right-click on an existing list and format from there. Use Increase Indent and Decrease Indent buttons to adjust indentation in lists.

Use cell alignment to adjust how text is displayed in tables. Select text then right-click to add formatting for headings and shading. Use captions to label tables. Captions can be numbered and linked with section headings.

Logos and branding

Import using Insert toolbar. Use Format Picture functions to adjust layout. Import in smallest file size for good visual display to reduce impact on overall file size.

Use Header and Footer tools to insert on every page or in selected sections.

Templates

Use the Save As tool, then choose Template to create your own template.

Start new files using File, New, then choose your allocated template to access templates.

Use of colour
Select Font and right-click to access the editing font menu. Clip Art and Word Art can also be used to add colour and visual effect. Select an element (such as a table cell) and right-click to fill with colour. Use Page Layout tools to adjust the page display colour.

Use of white space
Use line-spacing tools for space between paragraphs and bullet points. Use Page Setup tools for adjusting margins. Use section breaks and page breaks to create space between sections.

MS PowerPoint features
Microsoft PowerPoint offers a range of different slide displays for presenting title slides, slides with text, slides with multiple text boxes, slides with graphics and so on. Editing the Slide Master will allow you to create your own template.

MS Excel features
Microsoft Excel offers similar formatting techniques for fonts, page shape and page size. It also has a number of other options guiding table styles, choice of colours for data series and so on. Generally, selecting an element such as a column in a graph and right clicking will offer the basic choices for formatting that element.

Use extra applications

While the final document may be created in one application, you can use extra applications to prepare support materials. For example, tables and graphs created in Microsoft Excel can be imported to a Word document to support the text. Speeches written in Word may be accompanied by a PowerPoint presentation. PowerPoint has a function to add notes at the bottom of each slide and print a copy for the presenter.

If you are distributing electronic copies of a document, then consider whether your software application or your version is compatible with the recipient's system. You may need to save a file in an earlier version of a common application or use a universally available application such as Adobe Acrobat. PDF documents are often smaller files and less prone to carrying computer viruses, which also facilitates electronic distribution.

The application you choose will depend on a combination of:
▪ the purpose of your document
▪ the format of your document
▪ the applications available at your organisation
▪ your own skills and preferences
▪ the needs of your audience.

Most software applications allow you to create templates, so you can easily replicate documents. Templates allow different users to create documents that look the same. This improves the professionalism of documents, and also helps the audience as it becomes familiar with the way information is presented.

You can save Microsoft Word documents as templates, allowing you to set features such as heading styles, headers, footers and page numbers, and summary features such as a table of contents, an index and a list of tables. Likewise, you may set up a template in Microsoft PowerPoint which dictates the background colour, heading and text styles, and suggested graphics layouts.

If you will be creating complex documents regularly, it is worth completing specific training in the software applications you will use. Many of these applications have advanced features that allow you to create consistent, professional-looking documents, and save you time once the templates are set up.

Example

Establish method of communication

The following explains how Simon needs to prepare a submission for the chain of automotive repairers.

This potential client has asked for a presentation of Simon's submission, rather than just an electronic document. Since he and Jesse will attend in person, Simon decides to prepare a PowerPoint presentation to accompany the formal submission. That way Jesse can deliver the presentation, and then leave copies of the submission for Natalie, the purchasing officer. Natalie has requested printed and electronic copies of all materials.

Simon can also create a PDF copy so Natalie can access the file without using PowerPoint. Simon asks the production manager if it would be possible to provide some sample uniforms with the potential client's logo. He recognises that it is helpful to use physical items in a presentation, particularly when pitching for business, as this provides a very clear picture to the audience.

Practice Task 3

Question 1

Draw a line to match the method of communication on the left with the correct feature on the right.

» Procedure	» This method can be used to provide a record for legal purposes and a copy should be retained.
» Business report	» One of the advantages of this method is you can send correspondence to multiple recipients and track their receipt.
» Written instructions	» This method is used to guide, educate and inform staff.
» Business letter	» This method typically includes an executive summary.
» Agenda	» This outlines the steps involved in completing a task.
» Email	» This contains a list of meeting activities, in the order they will be discussed.

Question 2

Identify at least three features of word-processing software and give an example of a document that would benefit from this feature.

1D Organise information logically and develop a document overview

Taking time to think about the sequence of information and the categories you use to organise the information will help to ensure your document flows smoothly.

Create a control document

A control document gives an overview of the document content to help plan and develop the content.

Creating a control document can identify the work that needs to be completed and how far you have progressed. A control document can be used to show progress to a supervisor, identify any gaps as the deadline approaches, allocate work to other writers if needed and get feedback from others to check that the document is structured correctly.

The control document includes all the headings to be included in the document. It also includes brief descriptions of the content under each of these headings along with details of visual content such as graphs, photos or illustrations.

Some organisations include the completion of a control document, or content overview, as an interim milestone. For example, a staff member producing a complex business report may be required to provide a control document to their manager to ensure it meets their expectations. Getting approval at this stage of the task ensures you do not waste time developing unnecessary content.

Sequencing

The ordering of information will vary depending on the nature and overall content of the document. Some documents use a standard sequence that is consistently followed and so there is an expectation that the document will have a predictable layout and appearance to the reader. For example:

- An email has the following features: subject heading, a greeting, the body of the email where information is presented in a clear, concise format. If there is an action or response required, ensure that is clear to your recipient. Finish with a complementary close (e.g. Regards) and signature block.
- A business letter typically begins with the sender's address, the date, the receiver's address, the salutation and then a statement of the main point in the first paragraph.

- A research report typically begins with an introduction, followed by methodology, results and conclusions.
- A document that includes recommendations, such as a business case, would typically include a summary of recommendations towards the end of the document.

Your company may also have specific requirements for how information is ordered in a document. For example, it may need the information to be in chronological, alphabetical or operating sequence, as shown in the following table.

Chronological	Some reports may need a chronological sequence – the information is ordered according to the timing of events. For example, a research report is often organised according to the timing of research activities: a summary of existing research, methodology, findings and then conclusions and recommendations. A WHS incident report would also report what happened in a time order.
Alphabetical	Alphabetical sequences are used for reference documents, as it makes the information easier to find. Training manuals may follow this structure.
Operating	Documents that outline workplace procedures often follow an operating sequence; that is, the information follows the steps involved in the procedure. For example, perhaps the workplace procedure for responding to customer complaints is: (1) investigate the complaint (2) resolve the complaint (3) inform the customer (4) record the complaint and resolution in a database. The document outlining the workplace procedure would have the same four sections in the same order.

Categories

Structuring documents means placing similar ideas and concepts together to help the reader.

Information can be categorised in many different ways. It can be divided into sections to make it more readable; for example, a long report uses headings to divide information into categories. Tables also illustrate categories of information by placing them in different cells.

Another way to present similar ideas and concepts together is in a case study. Case studies are most often used in training materials and presentations. They can explain and emphasise how a topic, issue or technique relates to a specific context. For example, a training document for staff working for a furniture company could use a box or different font to indicate a case study on how a new sales technique is being used to sell furniture.

Here is the difference between a case study and an example:

Case studies

Case studies are often included at the end of a section or document. They are typically formatted in a way that makes them distinguishable from the other content; for example, they might be included in a text box, in a different font or under a specific heading.

Case studies are typically accompanied by supporting text that establishes the link between the case study and the recently introduced material.

Examples

Examples are generally less detailed than case studies and should not need as much explanation as a case study. They are used in the body of the document rather than a separate section.

Formatting and readability

Readability is the measure used to determine how easy a document is to read.

Readability is not only about the language you use, but also how the document looks on the page. For example:

- font between 10 and 12 points is easy for most people to read
- adequate margins make a document easier to follow
- white space on a page can make a document look more accessible and appealing.

If your company does not have a house style or style guide, spend some time planning the format for your document so you can use it consistently. The following is a list of formatting elements you may need to consider.

Elements to consider include:

- font styles for standard text, headings, subheadings, emphasising text, creating case studies, introducing new terms and so on
- headers and footers including document references, logos, copyright messages and so on
- labelling of graphics and other illustrations
- spacing between paragraphs, lists and sections to provide white space
- use of borders, break-out boxes and other emphasising tools.

You can also use headings to make your document more readable. A clear heading structure makes it easier to understand the flow of a document. This requires an understanding of the formatting features of software applications. Some examples are given below.

Heading hierarchies

Different font styles and sizes are used to differentiate headings for each section.

For example, chapter headings may use a large, bold font, and be designated 'Heading 1'. Section headings may use a smaller font, still in bold, and be designated 'Heading 2', while lesser headings may be distinguished with italics.

Numerical systems

A sequential numbering system can be used to differentiate sections.

For example, if the first major section of a report is 'Section 1', the first subsection would be 1.1, the second subsection 1.2, and so on. Roman numerals are sometimes used to organise information in subsections, so a list in subsection 1.1 might include: i, ii, iii, iv, v etc.

Alphabetical systems

Alphabetical systems are another way of differentiating between sections.

For example, Section 1a, Section 1b, and so on.

Practice Task 4

Question 1

Is the following statement true or false?

Operating sequences may be used for documents that have a reference function, such as training manuals.	» True	» False

Question 2

Which of the following statements are correct? Select yes or no for each one.

a) An email typically begins with the sender's address, date, receiver's address, salutation and then a statement of the main point.	» Yes	» No
b) Workplace procedures follow an operating sequence where the information follows the steps involved in the procedure.	» Yes	» No
c) Case studies are typically accompanied by text that establishes the link between the case study and the recently introduced material.	» Yes	» No
d) A document such as a business case would typically include a summary of recommendations towards the end of the document.	» Yes	» No

Question 3

List two advantages of creating a control document during the planning and development phase of your work.

Question 4

Identify one formatting feature that can make a document easier to read or follow.

Summary

- Identifying the expected outcomes of a document for the intended audience helps to clarify the purpose of the document.
- The format, style and structure of a document determines how it is presented. Some organisations have a 'house style' and/or a style guide that outlines how a document should be formatted, styled and structured.
- In a business setting, there are many different methods of written communication including letters, emails, written instructions, reports and agendas.
- Various software applications are available to assist people with the task of writing complex documents, such as word-processing and presentation software.
- The sequence of information in a document, along with the formatting, has a powerful influence on its readability.
- A control document is a helpful way of planning structure and content of your document.

Learning Checkpoint 1

Plan complex documents

Part A

1. Give two examples of how house styles are useful for organisations.

2. Which of the following guidelines would you find in a style guide? Tick all that apply.

- ◯ Abbreviations
- ◯ Grammar
- ◯ Copyright
- ◯ Approval processes
- ◯ Numbers and measurement
- ◯ Privacy and confidentiality policies

3. Identify three organisational requirements you may need to consider when developing a complex document.

4. Draw a line to match the person's need with the most appropriate method of communication on the right.

» Email	» Xavier needs to allocate the topics that need to be discussed in order of importance and allocate a time for each discussion.
» Procedure	» Fareed needs to record an agreement between two parties and arrange for it to be signed and dated by the relevant people involved.
» Meeting agenda	» Raoul needs to include some photos showing how to photocopy double sided on the new machine.
» Business letter	» Jai needs to confirm a question he has about the content of his report with his supervisor.
» Written instructions	» Yolanda needs to communicate to the other staff the steps required to prepare monthly accounts.

5. Which of the following statements are correct? Select yes or no for each one.

a) JPG files are used to display photos online.	» Yes	» No
b) TXT files are created in Adobe Acrobat.	» Yes	» No
c) PDF files are used when a document does not include complex formatting or graphics.	» Yes	» No
d) Zip files are compressed files.	» Yes	» No
e) In Microsoft Word, page numbers in a table of contents are automatically updated.	» Yes	» No
f) Microsoft Word has features that best suit promotional materials and brochures.	» Yes	» No
g) Microsoft Outlook can be used to assess the readability of a document.	» Yes	» No

6. What strategies can you use to see if there is an existing document already developed by someone else?

7. Choose one style of document and outline a suggested sequence for the information.

8. What does the term 'readability' mean and how does it relate to formatting?

Part B

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

Case study

Valeria works in the marketing branch of GreatFX, a medium-sized business that creates visual effects for film studios. Her boss, Geraldine, has asked Valeria to put together a document reporting on the results of the company's customer satisfaction surveys over the past 12 months. The audience for the document is a group of external consultants and advisers.

1. Write two questions Valeria can ask Geraldine to learn more about the intended audience and the purpose of the document.

2. GreatFX does not have its own house style, so Valeria needs to plan how to format her document before she starts writing it. Identify three formatting elements she needs to consider.

3. What should Valeria's control document include? Tick all that apply.

- ◯ All the headings in the document
- ◯ References that will be used
- ◯ Brief descriptions of content
- ◯ A timeline for the task
- ◯ Details of visual content

Topic 2 | Draft complex document

2A Confirm information is cohesive and develop a draft

2B Identify gaps and add information into a draft

2A Confirm information is cohesive and develop a draft

Presenting information cohesively means creating text that 'sticks together' and achieves topical progression from sentence to sentence. This makes it easier for an audience to comprehend the meaning and purpose of a document.

You have made decisions on the structure of the document to meet its purpose, audience and organisational requirements. Now you can confirm that your choice of communication matches the purpose of the document; for example:

- a business letter for a written record of an agreement
- an email for informal correspondence
- written directions to guide, educate and inform staff.

To make sure that the information in each document is cohesive consider if:

- you have all the relevant information you need
- the information is placed in the most logical place
- you have used cohesive devices such as linking words, pronouns, and repeated words or synonyms
- the audience or reader will be able to read and follow the document.

Gather and analyse the information

You may need to gather information from multiple internal and external sources to develop the content and produce a first draft.

The type of information you need to gather could include:

- numeric data such as financial data for an annual report, or survey data for a research report
- project status information such as a list of completed tasks for a progress report
- product information such as the details of a new product for a website or promotional material
- process or procedural instructions for a training manual or written instructions
- dates and time lines for a progress or staff meeting.

Colleagues, managers and staff in other departments will be able to help with where information is stored and how to access it. You may need to seek help from a range of people in and outside of your team. External sources of information might require internet research, perhaps from industry and government websites at local, state/territory and/or national levels.

Check the information is relevant and supports the overall purpose of your document. Do not include information that is not part of the requirements of the document. This is where you can use a template or sample document as a guide. You may also need to process information, including analysing data so you can present it to the audience in a format that is easy to read.

Once this is done, the information can be allocated to the correct section in the document.

The following is a list of tasks to enable you to check the information is what you need.

Review the relevance of the information

Check to make sure the information you have gathered is relevant.

Does it help you communicate the ideas, arguments or issues you want to get across to your audience? Does it align with the overall purpose of the document? If not, do not include it in your document, otherwise it will distract your reader and undermine the cohesiveness of your document.

If the information is incomplete, you may need to return to the source to seek the missing information or gather the information from an alternative source (see section 2B).

Check the quality and reliability of the information

Check to make sure the information and data you have collected meets the requirements of your organisation. For example, your organisation may only use data that comes from trusted sources or may only incorporate research that meets specific standards.

Analyse the information

You may need to analyse the data you collect. For example, you may have been given the raw data from a survey in an Excel spreadsheet. What is that data telling you? How does the data support the key messages you need to communicate?

As you collect information and incorporate it into your draft, it may be worthwhile to make notes on your analysis. You can then use these notes when you complete the final document.

Allocate the information

You should have a designated section in your document for the information you have collected. If you are not sure where a piece of information should go, reviewing the overall outline of your document may help you determine where the information fits. You may need to revise your control document to include extra headings or sections, but make sure whatever changes you make align with organisational requirements.

Check logic and consistency

A complex document should not be *complicated.* Although the concepts and ideas may be challenging for the reader, they should be easy for your audience to understand and align with their level of knowledge on the subject. The way your document is organised should also make sense to the reader.

The document should also be consistent. The language and tone of the document should remain consistent throughout, as should the referencing style, the formatting and so on.

Once you have gathered the information, you need to confirm that it meets requirements and fits together to create a single cohesive document.

Develop a draft

Most readers in a business environment do not have time to read over a document several times to understand its key messages. Effective business writing must be clear and concise. The language should be appropriate for the audience and the content should match their knowledge on the topic. The preparation and planning that you've already done means you have a good idea what the final product needs to look like because you are familiar with the organisational style and the procedures and policies that underpin the development of your documents. This includes use of the company's logo, privacy and intellectual property and referencing considerations, cyber security and use of IT.

Some general suggestions for effective business writing are outlined below. Where these suggestions contradict your organisation's style guide, you should follow your style guide.

Minimise technical language	▪ If the language in your document is too technical, your audience may not understand it, and the document will not achieve its purpose. ▪ Avoid using technical language and references. If in doubt about your audience's understanding, give definitions for terms when they are first used. You can also include a glossary of terms as a separate part of the document.
Minimise jargon	▪ Many organisations use unique jargon, abbreviations and acronyms. While these may be in common use in the organisation, defining them when they are first used, and using simple alternatives where possible, will help your readers comprehend the document.
Use the active voice	▪ When the subject of a sentence is performing the action, you are using an active voice (e.g. Jane chaired the meeting). ▪ When the subject of a sentence *is acted upon*, you are using a passive voice (e.g. The meeting was chaired by Jane). ▪ Sentences written in active voice are generally easier to understand than those written in passive voice. Passive voice often requires a more complex sentence structure, which can confuse the reader.

Use a clear, simple vocabulary	▪ It may be tempting to use complex words in your document; however, you should strive to use clear, simple language wherever possible. ▪ Even if your readers understand the complex words you are using, it can make the reading process more demanding. Using a clear and simple vocabulary allows the reader to concentrate on the overall message you are trying to convey.
Use tools for summarising information	▪ Using bullet points, tables and lists to summarise information are useful ways of reinforcing key messages. ▪ When using lists, ensure that all the dot points have the same grammatical structure and flow logically from the leading sentence.
Avoid lengthy, complex sentences	▪ Keep sentences short and simple, with one subject for each. Paragraphs should also be limited to one primary subject, which is introduced in the first sentence.
Use topic sentences	▪ Use topic sentences within a paragraph to indicate the main point of that paragraph. This helps restrict each paragraph to one key idea, which is easier for the reader to follow. ▪ Clear topic sentences will also help you group together a cluster of similar paragraphs, which together may form a section of your document.
Use an appropriate tone	▪ Emails, promotional materials or staff newsletters may have a friendly, conversational tone. Documents that may become legal records, such as business letters, tenders or submissions, generally require a more formal tone. Consider your audience when deciding the appropriate tone for your document.

All these principles help to make a document readable. If you want to measure the readability of your document – in terms of the language you have used – numerous tools are available. These systems assess the sentence length, the average number of syllables per word, and the number of sentences in the document. The results are put into different formulas to create a readability score. Microsoft Word can be configured to provide readability scores using the Flesch Reading Ease and Flesch-Kincaid Grade Level tests. It will also calculate the proportion of passive sentences.

You can read about the instructions for readability tools available from Microsoft at: aspirelr.link/microsoft-readability-tools

Example

Use business-appropriate language

The following presents some examples of the appropriate use of language for specific types of documents.

Business letters

You might prepare a detailed business letter to a franchisee to provide a record of an ongoing negotiation. This letter might include several sections, perhaps one with a chronological list of discussions and agreements, one outlining the franchisor requirements, and one detailing the agreed next steps and schedule. Even if you have regular, more informal correspondence or emails with the franchisee, this document should adopt a formal tone and use plain English in the active voice.

Legal records

Contracts and other legal records must use technical terms with extreme care. Legal documents depend on precise definitions and exact usage of particular terms. If you think your document may have legal implications, consider requesting a legal review to make sure it cannot be misinterpreted. Legal documents should also adopt a formal tone.

Training materials

Training materials should carefully consider the general education level, specific subject knowledge level and demographic mix of the audience. This will guide the author in adopting an appropriate tone for the materials. If developing a course for school leavers with no background in the subject, rather than a refresher course for mature-age students, you might use less formal language but more extensive definitions of technical terms.

Practice Task 5

Question 1

Which of the following are ways to confirm you have a cohesive document that meets set requirements? Tick all that apply.

- ◯ Only include information that is current and relevant to the topic.
- ◯ Check for accuracy and reliability of the information.
- ◯ Challenge the audience with complex language so they will extend their level of knowledge on the subject.
- ◯ Restrict each paragraph to one key idea, to make it is easier for the reader to follow.
- ◯ Calculate the readability of the document and test with a sample of the audience.

2B Identify gaps and add information into a draft

Now that you have a basic first draft of your document, there may still be some gaps that need to be filled, such as missing data, information or knowledge you need to collect.

Asking questions when revising a document draft will help you identify areas for improvement. Is there anyone else you should have spoken to? Have you used all the sources available? Did you use the most reliable sources? These are just some of the questions you may ask yourself.

Here are some other items to consider:

- You may have developed the first draft of a business letter and realised that the recommendations made need to be backed up with references.
- Your draft email is waiting on the latest figures for online sales or more up-to-date figures for a table or graph.
- If you have quoted what someone said, you may need to check the accuracy of your quotation and/or ask for permission to reproduce the material.
- The content you are rewriting for someone else may require that they check the document to make sure your interpretation of the content is correct, especially if it is technical material or material you are not familiar with.
- Your meeting agenda may need to have the priority agenda items confirmed by the chairperson.

One way of seeking help is to mark up a Word document or email with comments or use a red font indicating where the possible gaps might be. You can use Microsoft tools such as Comments and Tracking in the Review tab, which can show comments, insertions and deletions, and formatting from all reviewers or specific people.

You might need to research extra information from external sources, such as government departments, local council or industry organisations, or from others in the organisation.

Colleagues or team members

Usually in your own area and can be approached directly. May have information, extra skills and experience or time to assist you.

Consultative committees

Consultative committees may be helpful for understanding background to a policy or direction for a document.

Internal specialists

Internal specialists may be helpful for understanding background to a policy or direction for a document.

Managers or team leaders

May be useful for advice, particularly about a general approach to a document or possible information sources. May also be helpful in resolving delays in gathering information from other employees.

Staff in other departments

May be used to provide specialist skills or to locate specific data. Unless such requests are a standard part of their job, it is good practice to inform their manager or supervisor of the request.

Unforeseen delays

Requesting information can sometimes be tricky, depending on your relative position and influence in the organisation. Allow enough time to complete your work and to follow up on critical information.

Waiting on others to provide the information you need to finish a document can be frustrating and can hold you up from finishing your work. You can remind others of your request and, where appropriate, give them information about when your document is due and the potential consequences of any delay. For example, you may need financial data from the finance team at a time when they will be busy with month-end transactions. You could ask the finance team for the financial data earlier, to help ensure your deadlines can be met. Or, where appropriate, you could ask the manager of the finance team to help you access the information. If you are meeting resistance, you may need to ask your manager or supervisor for help.

Once you have all of the information you need, you can finish off the draft text by incorporating the comments from others on improvements and the extra information you have gathered. Make a final check of the requirements of the task by reviewing any instructions you were given and information provided in the style guide.

Example

Identify and fill gaps

The following demonstrates how Simon deals with the issue of not receiving requested information to meet deadlines.

The problem

Simon realises that he still has not received the samples from Mario on the day he has promised them. Concerned about the photo shoot, he calls Mario and explains that the shoot is scheduled for 12 o'clock the next day, and there will be extra cost if the shoot is delayed. Mario promises to adjust his plans for the morning and have the samples to him by 11 o'clock. Simon decides to call Mario first thing in the morning to make sure this is still the plan. He also advises Jesse, who agrees to call Mario's supervisor to reinforce the importance of having the uniforms for the photo shoot.

Problem resolution

By explaining to Mario how the delay with sample uniforms will affect his cost and timing, Simon is able to persuade him to adjust his schedule and deliver them to meet his requirements. It might have been easier if Simon provided that information to Mario earlier, and also developed his schedule so that there was a little more leeway to check the samples before the shoot. It is appropriate to inform Jesse because there is a risk of increased cost if the samples are not available, and she can provide support by contacting Mario's supervisor.

Example

Use a checklist to ensure the draft meets requirements

A checklist for your first draft can help confirm you have addressed all the requirements for your document.

Draft document title: **Date:**						
Checklist tasks	1st draft		2nd draft		Final draft	
	Yes	No	Yes	No	Yes	No
Confirm the purpose						
Confirm the audience details						
Chose a method of communication such as email						
Read relevant policies and procedures						
Identify the required template						
Confirm any previous versions or samples						
Refer to the style guide for formatting such as fonts, heading styles, footers and headers						
Use an appropriate software program						
Use the recommended language style and a suitable tone for the audience such as plain English and appropriate use of terminology						
Put points in a logical order and categorise together						
Suggestions/comments						

Practice Task 6

Question 1

Give three examples of situations where gaps in information might be identified, which require you to collect extra information.

Summary

- Check the information you intend to use in a document to make sure it is relevant, supports the overall purpose of your document and meets organisational requirements.
- Gather information from different sources to develop the content and produce a first draft.
- Once you have gathered the information, you need to confirm that it meets requirements and fits together to create a single cohesive document.
- Effective business writing is clear and concise. The language is appropriate for and understandable to the audience, uses plain English and minimal jargon.
- Identify any gaps or information you are missing and search for the information from others or do your own research.
- Colleagues, consultative committees, internal specialists, managers, business owners or employees in other departments may be able to provide missing information.
- Relying on other people to provide information for a document can be frustrating. To help others stay on track, remind them of your request, your document's due date and the potential consequences of any delay.

Learning Checkpoint 2
Draft complex documents

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

Case study

Jonathon is a communications officer at NLM, a large telecommunications company with offices across Australia. Jonathon's manager, Rani, has sent him an email requesting that as a part of his monthly staff e-newsletter he needs to include information about an upcoming professional development opportunity for staff. Rani provides the details of the training, the objectives and a brief outline on the topic.

It is a whole-day event with lunch provided. Rani needs to know the level of interest from each office by 30/9. Rani wants Jonathon to collate the numbers of people interested and report back to her by 29/9.

1. Which of the following are actions Jonathon can take to ensure his email is cohesive and meets its purpose and requirements of the organisation? Tick all that apply.

- ◯ Check he has included all the relevant information
- ◯ Place the information in a logical order
- ◯ Ensure the recipients will be able to follow the instructions
- ◯ Add some personal information about himself
- ◯ Offer staff several alternatives to replying via email.

Jonathon prepares the following text in his email:

On Monday 5 October, Head Office will host a training workshop for all staff who want to learn more about the new privacy legislation introduced by the Commonwealth government last month at the Melbourne Telecommunications Conference.

The objectives of the workshop are to educate staff about the contemporary legislation, explore the implications of the legislation and deliberate on how it will be applied.

2. Finish off the text for the email to explain to staff how they should register according to Jonathon's instructions.

Having completed the first draft of the newsletter, Jonathon identifies a gap in the information to staff in his email. He needs to include some background information about the privacy legislation and the importance to the telecommunications industry. He will also provide a weblink where staff can read about what will be covered in the training.

3. Jonathon is not sure where to look for this information and what he needs to do to summarise some information to include with the weblink. What two suggestions might help Jonathon with this task?

4. As a final check of the text in his draft email, what should Jonathon do before sending the email to his manager for review?

Topic 3 | Finalise complex documents

3A Review draft text for accuracy
3B Confirm approval for draft text
3C Incorporate amendments
3D Choose design elements
3E Check the final document

3A Review draft text for accuracy

Errors can distract readers from a well-crafted document and reduce its professional appearance.

It is likely you will complete several reviews of your document, as you process amendments, finalise small details and check the overall functionality of your document. This means there will be less distraction by small errors relating to style or phrasing and you can concentrate on the content and key messages in the document.

A detailed review of a document requires concentration, so try to find a quiet place without interruptions. Some people prefer to review a printed copy of a document, noting any errors on paper before amending their electronic document.

Review checklist	Yes	No
Does it achieve the document purpose?		
Does it fulfil the expected outcome or purpose? (e.g. staff learn how to use equipment, senior management understand options, customers understand benefits)		
Is the language appropriate for the audience and the method of communication?		
Does it conform to length requirements (e.g. number of pages, number of words)?		
Have you used the correct template?		
Have you conformed to style guide requirements (e.g. formatting, style, structure)?		
Does it conform to the principles of effective business writing such as: ▪ clear and simple vocabulary ▪ active voice ▪ appropriate tone?		
Does the text flow and is it logically sequenced?		
Have you met referencing standards; for example, bibliography and acknowledgments?		
Are your files an appropriate size and type for your chosen format?		
Is the overall content appropriate to the audience's knowledge and skill level?		

Review checklist	Yes	No
Is there sufficient information to achieve the document's purpose?		
Have you completed all necessary internal reviews of the text?		
Have you made all required amendments suggested by the reviewers including adding text?		
Have you reviewed formatting for consistency?		
Have you asked a colleague or associate to read the document?		
Have you saved the draft version with a file name that you and others can recognise?		

File naming standards

Version control is critical when saving and circulating documents to others to review and return with comments or changes. If you are in the process of negotiating changes to your document, make sure you keep track of each version of the document. Some organisations have version control file naming standards which may be outlined in the house or style guide. The purpose of having a file naming convention is so it can be used consistently across the organisation.

File naming standards ensure you can locate the latest version and reduce any confusion for others. For example, if you left your work unfinished and another person was asked to complete it, would they be able to locate and recognise the latest version you were working on?

To identify versions, some organisations require that words or numbers are added to the file path of the document to identify the draft version. As each new draft is developed, it is saved with a new file path name/date/version. For example, a style guide in a finance department may require invoices to follow the following rules: 'Invoice_Invoice number_Unit_Name'. This becomes: 'Invoice_076_BSXTEW301_BettyFlinstone'

Here are some guidelines for file naming standards from the NSW Department of Education:

Do:

- Use plain English
- Use meaningful keywords
- Use all lowercase letters
- Use hyphens - to separate words (with no spaces)
- Use a friendly name and remove any internal identifiers

Don't:

- Shorten or abbreviate words
- Use special characters
- Use spaces
- Put ID numbers before keywords
- Use _final, _V1, etc.
- Use "quote" marks. Ever.
- Use meaningless file names like IMG00023.JPG.

Updating files

When you update your files, use the same filename and overwrite the existing one to ensure there's only ever one version of your file in the CMS.

Example

Review draft text

The following example describes how a draft submission could be reviewed.

Simon has completed a draft of the submission and Jesse's presentation, and has a meeting scheduled with Jesse for review and approval tomorrow ahead of submission in three days' time. He reads over the company style guide to refresh on the key requirements, and begins to read the submission carefully.

Simon takes his copy of the request for tender and carefully checks that he has included the key requirements. He marks each of Natalie's requirements with her corresponding section number. He does the same with the notes he took when discussing organisation requirements with Jesse and realises that he has not included a list of their key clients. He adds this to his document.

Next, he reviews Jesse's presentation. He discovers that the pricing table has not been updated and rectifies it. He also checks the detailed presentation notes he has developed for Jesse, since the slides only include brief bullet points. Simon saves the work he has done to the draft as 20201028_tender_submission_edit.

Check grammar, spelling, style and punctuation

Errors in a document distract the reader and reflect poorly on the author.

Some people find it useful to put their document aside for a short period and do something else before they review it. Once you have had a break from the document and go back to it, you can often see errors that you did not previously notice. Alternatively, you could ask someone else to review the document for you.

If you need to create complex documents as part of your job, it is important to have a basic understanding of grammatical rules, appropriate use of punctuation and how to check for spelling errors.

The Digital Transformation Agency has developed a set of rules relating to grammar, punctuation, spelling and style in the *Australian Government Style Manual*. As well as being a key reference for public servants, the guide is widely adopted by businesses and non-government organisations in Australia. You can access the document at: aspirelr.link/style-manual

Here are some specific features you need to check as you review your document.

Grammar

Grammar informs how language should be used, such as how words are used in sentences. A document with incorrect grammar can be difficult for a reader to understand.

Many word-processing applications, such as Microsoft Word, have automatic grammar checks. These are a good first step to avoid obvious errors. You can generally choose to have them displayed as you write or after you have completed the document.

When using word-processing software to check your grammar, you need to check the suggested changes as the software may highlight content that is a unique feature of your company's style guide.

Punctuation

Punctuation marks are used to separate sentences and elements in sentences. Correct punctuation improves a document's readability.

Here are some examples of punctuation marks that may need to be used in a document. Your style manual should give guidelines on how to use these.

- Commas
- Apostrophes (')
- Round brackets
- Colons (:) and semicolons (;)
- Hyphens (used to join word parts, such as full-time and back-to-back)
- Quotation marks (" ")

Some software packages will automatically check punctuation in a document.

Spelling

At a minimum, you should run a spellcheck on any document before you distribute it, even for preliminary review. Check which dictionary your word-processing application is using, as some organisations prefer UK over US spelling; for example, using 'organisation' instead of 'organization'.

There are some errors that may not be identified by automatic spellchecks. For example, you may type 'form' instead of 'from'. These errors are sometimes identified in automatic grammar checks, but not always, so review your document carefully for these types of errors.

Style

Make sure the style is correct. Are you using the correct logos? Styles? Have you referenced sources correctly? Check to make sure you use the correct style consistently throughout the document.

Flow

Read the document (or part of the document) out loud. Does it flow easily? Does it take too long to read some sentences? If so, you may need extra punctuation to break up the sentences.

Consistency

Ensure the information in the document is consistent. For example, if a sales report provides an overall result in the introduction, then this must be consistent with the figures given in rest of the report.

Even if you are not responsible for developing this data, you should review the document for inconsistencies and discuss any errors with the person who provided the information.

Sometimes you may not understand the data well enough to identify the inconsistencies yourself. In this case, consider asking the person who developed the data to review the draft and confirm that you have correctly presented and interpreted the data.

Grammar and punctuation examples

Along with the rules outlined in style manuals, all languages have grammar and punctuation rules. Here are some examples of general rules and conventions for written English.

Grammar and punctuation rules	Examples
A sentence should communicate a complete thought.	Customers who make a complaint must be contacted within 48 hours. ✓ Contact in 48 hours. ✗
Sentences require a subject – the subject is the person, place or idea that is being described or performing an action.	The customer service officer should use the customer's preferred method of contact. ✓ (the subject is the customer service officer) Time to make contact. ✗ (who is making contact?)
'It's' is a shortened form of 'it is' or 'it has'. For these contexts, it always has an apostrophe. 'Its' is used when indicating possession. It never has an apostrophe.	It's expected that staff will record the details of their interactions with customers. ✓ Its expected that staff will record the details of their interactions with customers. ✗ The file has its own unique number. ✓ (the unique number belongs to the file) The file has it's own unique number. ✗ (It's should not be used here because it the sentence requires the possessive form.)
Titles, degrees, languages and special days should be capitalised.	Associate Professor Nguyen will be giving the keynote speech. ✓ He has a PhD in linguistics. ✓ He speaks fluent French. ✓ He will be arriving on New Year's Day. ✓
Use inclusive terms.	The story of humankind ✓ The story of mankind ✗ The chairperson is responsible for managing the meeting. ✓ The chairman is responsible for managing the meeting. ✗* * Unless a reference to a man or woman is specifically intended, such as 'Mr Nguyen was the chairman for 5 years'.

Example

Check grammar, punctuation, spelling and style for accuracy

Simon now needs to check the grammar, spelling and style of the submission. He takes a walk to clear his mind, then comes back to the office and, so he can concentrate, switches his phone to divert incoming calls.

He uses the grammar and spellcheck functions in Microsoft Word to check for mistakes, carefully reviewing suggested changes to make sure they are correct. Occasionally, he reads a sentence quietly to himself to check the flow of the content. Some sentences are too long, so he breaks them up using punctuation marks.

He then asks his colleague Rajith to read through the document for him. He asks Rajith to pay particular attention to any errors with grammar, spelling or punctuation.

Practice Task 7

Question 1

Give at least three examples of possible changes that may need to be made to a document when reviewing the draft text.

Question 2

Which of the following statements relate to reviewing a draft of a document? Tick all that apply.

- ◯ This task requires concentration and reading without interruptions.
- ◯ Use special characters in the file name so you can recognise the document that you were working on.
- ◯ Print a hard copy and make amendments on the document before amending the electronic document.
- ◯ Read the document out loud to the person doing the review so they can concentrate on the content.
- ◯ Look for small errors relating to style or phrasing.

Question 3

Review the following paragraph. Rewrite the paragraph using the active voice and correct any grammatical, spelling and punctuation errors.

> Ahmed was requested by his manager, Lottie, to review her presentation for the sales' conference, which she was delivering to the regional managers as she is particularly concerned about the combination graph for the sales figures, and whether they are much too complex to present, since they may be hard for the regional managers' to follow. Ahmed, being Lottie's assistant, reviewed the presentation, h corrected some spelling mistakes, Ahmed made notes on some content revisions and he thinks he has a suggestion for presenting the graph more clearly.

Question 4

Which of the following statements are grammatically correct? Tick all that apply.

- ◯ Its essential that Doctor Arrulo has access to the office on Good Friday.
- ◯ It's essential that doctor Arrulo has access to the office on good Friday.
- ◯ It's essential that Doctor Arrulo has access to the office on Good Friday.
- ◯ Its essential that doctor Arrulo has access to the office on Good Friday.
- ◯ It's essential that Doctor Arrulo has access to the office on good Friday.

3B Confirm approval for draft text

You may need to get your draft document approved before it is printed or distributed.

The level of approval required will depend on the type of document you have written, your role, your manager's approach and the policies in your organisation. It will also depend on the size and purpose of the organisation; for example, if there are dedicated areas for particular roles such as a printing area or a legal or human resources department.

Always gain approval for documents that will be signed or delivered by someone else. In these circumstances, approval might come from the person signing or delivering the document or another person authorised to approve the document on their behalf. Take note of their suggestions and comments and send any queries via return email to make sure you understand what they are suggesting.

This approval process may involve an examination of one or many features in the document including content, formatting and layout, legal compliance and style.

Formatting and layout

If you have created a document that will be formatted by another employee or external agency, then you should approve the final layout before it is printed or published. You may also need approval from other stakeholders in your organisation such as the marketing or sales area.

For example, you may have written a brochure for distribution to customers, which will then be sent to the printers for layout. The printers send the final proof for sign-off before it is printed, and this is the time to make one final, careful check for any errors. Correcting errors after printing is expensive and wasteful.

Documents that are likely to need formatting and layout approval include the following.

Documents that typically need approval for formatting and layout
▪ Any document with significant printing or publication cost ▪ Publications, leaflets and brochures ▪ Presentations ▪ Website text

Almost any document can require approval, but in general, the more important a document, and the wider its circulation, the more likely it is that approval will be required.

Some managers will revise a document during the approval process. For example, they might rewrite a section or cut out unnecessary words. These amendments are typically made to make a document more effective or persuasive, cater to audience preferences or emphasise key messages.

Some of the specific formatting and style features that may need to be approved include:

- citations and references
- correct use of template
- correct use of house style and organisational style guide requirements.

Legal compliance

Any document that commits the organisation to a course of action or that has other legal implications should be approved by a staff member with appropriate authorisation. This might be a lawyer employed by the business or it may need to be sent to an external lawyer. Check with your manager who this person is and get the authority from them before forwarding the documents.

Legal approval should occur in the final stage in the approval process; even minor changes can have legal implications. You should be guided by your organisation's requirements on legal approvals.

Documents that commonly require legal approval include:
▪ contracts ▪ policy documents ▪ publications, leaflets and brochures ▪ public notices ▪ tender submissions.

The review process

The people who are required to approve your document will vary, depending on the type of document you have written and the policies and procedures of your organisation. If there is no standard procedure in your organisation for approving documents, ask your manager or supervisor if they would like to review your document before it is circulated. They may also suggest other people who should review the document.

You will need to allocate time for the approval process and, where necessary, develop a sign-off sheet.

Allocate time for approval

You should allocate time in your schedule for the approval process, including extra time to make amendments based on feedback. How much time you need will depend on the size and complexity of the document, how long you expect it to take for the reviewer to return their comments, and how long you will need to make the amendments.

If you know when your document is likely to be ready for approval, check whether the people who need to approve it will be available at that time. This will remind them that the document is coming and allow them to schedule time to review it. This is especially important if the document needs to be published or distributed by a specific date.

If several people need to approve the document, circulate it in order of increasing seniority.

Manage the process

The process of managing approvals from multiple people can become complicated. For example, an earlier reviewer might not agree with something a later reviewer suggests. In circumstances where there is a clear line of authority, the process is likely to be easier as the later reviewers have the 'final say' regardless.

If your organisation does not have a standard process for seeking approval, and/or there is no clear line of authority among your reviewers, you could ask all the reviewers to read the document at the same time and then bring them together to discuss and negotiate amendments. This brings transparency to the process of amending the document – all the reviewers are aware of the changes being made and why they are being made.

Develop a sign-off sheet

You may wish to consider developing a formal sign-off sheet for approvals, particularly if multiple people are involved in the review process.

The sign-off sheet should accompany the draft document as it is circulated for approval, with previous versions attached. The reviewer signs the sheet to show that they approve the document. The sign-off may be a section indicated in the bottom of an email instead of a separate document.

A sign-off sheet is particularly useful for formal documents, documents requiring external printing and documents with possible legal implications.

Example

Confirm approval for draft text

After his meeting with Jesse, Simon contacts Frank and Mario to let them know the submission and presentation will be ready for their approval the following day. He reminds them that he will need the documents back within a week.

Before he sends the documents to Frank and Mario, Simon decides to incorporate Jesse's amendments. First, he updates the pricing table in the submission and the presentation and adds the disclaimer to both documents. Then he makes Jesse's recommended amendments to the presentation. Finally, he develops a sign-off sheet so he will have a record of Frank and Mario's approval.

Practice Task 8

Question 1

Which of the following documents are most likely to require legal approval? Tick all that apply.

- ◯ Internal meeting presentations
- ◯ Public notices on the company's website
- ◯ Policy documents
- ◯ Publications, leaflets and brochures
- ◯ Contracts
- ◯ Training manuals

Question 2

Identify three factors which may affect the time you need to allow in your document development schedule for the review process and to make amendments.

Question 3

When is it a good idea to use a sign-off sheet? Tick all that apply.

- ◯ If multiple people are involved in the review process
- ◯ If there is no clear line of authority among the reviewers
- ◯ If the document has possible legal implications
- ◯ If the document is going to be printed externally
- ◯ If the approval process is likely to take a long time

3C Incorporate amendments

It is likely that the approval process will lead reviewers to suggest changes to your document.

When you receive these suggestions, ask the reviewer if they want to see the document again once the changes have been made.

In some circumstances, any amendments you make *after* the document has been reviewed will need to be approved. For example, if you make a suggested amendment to the document after it has gone through the entire approval process, you may need to seek approval for the document again. In these situations, aim to make only the necessary amendments, especially if there is a lengthy approval process in your organisation.

Some commonly required amendments are outlined in the following.

Content

- The content changes you are required to make can be time-consuming. For example, a reviewer might suggest that your sales report include a graph comparing sales figures across years. You will need to collect this information, create the graph and insert it into your document with supporting text.
- Reviewers could also suggest removing certain content; for example, if it is irrelevant or if it breaches privacy or confidentiality policies.
- Presentations and speeches may need substantial changes, as the presenter needs to be comfortable with the content they are delivering.
- If you need to rewrite content provided by a reviewer, make sure you check with them to ensure your rewritten content is accurate, especially if it is technical content.

Formatting and layout

- These changes will be relatively straightforward to make, although they can still be time-consuming.
- Be aware that when external printers and publishers are involved, preparing multiple proof copies can become expensive. Ensure that you circulate the proofs to all affected stakeholders before returning them to the printer.

Legal compliance

- Some legal input may be non-negotiable. Experts may require wording to be changed to comply with legislation. Other legal guidance is more general and may relate to minimising risk.
- Check with your manager and other relevant stakeholders about legal approval for your document. Keep a record of these interactions such as copies of emails so you can demonstrate that you sought advice on this issue.

Style

- Reviewers may make small changes to wording or indicate that they do not understand your message and ask you to revise the document accordingly.
- When more than one person is reviewing a document, make changes progressively, so that each reviewer receives the latest version of the document.
- Use the file naming standards for your organisation.
- It may be worthwhile to also save each version – with any notes and comments from reviewers – if you are later asked to justify the decisions you made about the document.

Example

Incorporate amendments

The following describes how Simon approaches the task of making changes to his submission.

Frank and Mario have returned the submission and presentation to Simon. Simon needs to make multiple amendments to both documents, based on Frank and Mario's review. Frank has asked to see both documents again after Simon has made these amendments so he can give final approval and sign the sign-off sheet for the documents.

Mario has highlighted two paragraphs of text that he does not understand and has asked Simon to rewrite them. He has also asked Simon to remove some content from the presentation because he does not think it is ready to be shared with a wider audience.

Simon makes these changes and, when he has finished, reads through both documents to ensure he has made all the suggested amendments. He then saves the old and new versions of the documents, adding the date and version number to the file name, and sends the new versions to Frank for final approval.

Simon will keep a copy of the old versions of the documents just in case he is asked why some content was included or left out.

Practice Task 9

Question 1

Are the following statements true or false?

Reviewer input for documents is non-negotiable.	» True	» False

Question 2

Is the following statement true or false?

Speeches that are going to be delivered by someone else often need substantial changes after the person who is giving the speech reviews the draft.	» True	» False

Question 3

Identify a situation where a reviewer might suggest the removal of content from a document.

3D Choose design elements

Once the text has been finalised, you can now work on adding the design elements and complete the writing task.

The design elements of your document will typically be dependent on the type of document you are writing, and the audience and purpose of the document. For example, you might use a traditional, symmetrical layout for a management report but adopt a more light-hearted, colourful layout for a presentation delivered to colleagues.

Depending on your role and the structure of your organisation, you may need to format your document yourself, or pass it on to someone else to format it for you. As discussed in Topic 1, formatting may be dictated by your organisation's house or style guide.

Capital letters and acronyms

It is important to use capital letters appropriately. It is not a good idea to capitalise all the letters in a word or a heading (e.g. 'DECISIONS') in professional documents such as letters and reports. However, if you do choose to use this style, make sure you use it consistently throughout your document. Some rules apply to capitalisation, such as always using a capital for the first word of a sentence, for proper nouns like Australia and for initialisms such as ANZ (Australia and New Zealand).

Fonts

Fonts can provide contrast in numerous ways, as outlined here.

Size

- Vary text size based on the relative importance of the text.
- Headings will usually use the largest text, followed by subheadings, body text then captions.
- For body text, try to use at least 10-point serif font to improve readability.

Weight

- Most fonts can be portrayed in different weights such as bold, different styles such as italic or underline, or combinations such as bold-italic.
- These add interest and give cues for items like headings, new terms, emphasised words and titles of publications or films.
- Plan their use carefully and apply consistently.

Position

- You could angle headings, text or whole sections, to give visual interest.
- This is better for documents relying heavily on visual impact, such as presentations, promotional materials and newsletters.
- Use carefully, and ensure the text is still easy to read. Consider accessibility issues and organisational guidelines/policies.
- For visual materials, you can achieve a similar effect by balancing the page elements so they are of contrasting size and position, without angling the text.

Colour

- Contrasting text colour can highlight key elements.
- Use colour changes sparingly and consistently for headings, warnings, break-out boxes or other key information.
- Ensure colours used in presentations can easily be read in the chosen venue, and that any text colours used are clear against the chosen background.
- For accessibility, never rely on colour alone to convey meaning. (This ensures that information is legible for people with colour blindness.)

Serif or sans serif

- Fonts that are called serif have small tails or structures on each letter. An example of such a font is Times New Roman. This type of font is used in many books, newspapers and magazines as it is easy to read.
- Sans serif fonts such as Arial (this typeface) are used in headings and for shorter pieces of text as well as for websites.
- While a mixture of fonts is usual in a document, too many different fonts can make the document difficult and confusing to read.

Headings

Headings give structure to a document and guide the reader. Here are some ways to style headings to make them consistent.

Consistent styles

Apply heading styles consistently throughout your document to avoid confusing the reader. Heading hierarchies allow for subheadings to be created in a similar style to the main heading. Limit the subsets of headings to a maximum of five in a document, or it becomes confusing for the reader and hard to differentiate different levels of text.

Heading fonts

In print, heading font styles are often sans serif fonts, while body text fonts are usually serif fonts. Italics are sometimes used for headings lower in the hierarchy. Numbered headings are convenient for cross-referencing; however, more than three levels of numbered heading (such as Section 4.1.1.3) can become cumbersome.

Heading structures

Headings should be followed by text, even if it is only an introductory paragraph. Sometimes, a topic heading may be immediately followed by the first subheading, such as 'Topic 1' followed by 'Section 1.1'. Using three consecutive headings not separated by text (such as adding 'Section 1.1.1' in this example) is clumsy and confusing. If there is only one of a particular heading level, you should consider removing that level. Topic 1 only makes sense as a heading if it is followed by Topic 2, for example.

Example

MS Word headings

Use fonts to differentiate between different heading levels. Consider the sample from Microsoft Word here.

Heading One	uses Tahoma (Headings) font in size 16, bold
Heading Two	uses Tahoma (Headings) font in size 14, bold
Heading Three	uses Tahoma (Headings) font in size 13, bold
Heading Four	uses Rockwell (Body) font in size 12, bold, italic
Heading Five	uses Rockwell (Body) font in size 10, bold

Justification and alignment

Your organisation house style and style guide may specify how text should be aligned in the document. The options for alignment are outlined below. Justified and left-aligned text are the most commonly used.

Justified text

Justified text is evenly spread between the margins. Spacing between words is adjusted to create this block effect, which may be applied fully across the page or in columns (as it is in newspapers).

Left-aligned text

Left-aligned text has an even space between words and sentences break at different points on the page.

Centred text

Centred text is often used for visual effect, particularly headings. Blocks of text may also be centred for visual impact, particularly in promotional material. This can be distracting if overused.

Right-aligned

Right-aligned text is relatively limited because the text starts at varied points across a page and ends evenly on the right-hand margin. It is useful for addresses on letters, or columns of figures in a table.

Lists and tables

Bullets, as used in this document, are generally the preferred method for presenting lists.

Numbers or letters may be used to indicate priority or sequence in a list. In print, bullet lists are often indented to one or two levels from the main text to create emphasis. Lists and bullets, like most design elements, should be used consistently throughout the document. Here is some extra information on using lists and tables.

Lists

Ensure that the list adopts a consistent, parallel format that follows logically from the leading sentence. Lists should:

- be in a logical sequence and follow on from the leading sentence
- use a similar sentence structure
- use bullet points rather than numbers
- use similar formatting throughout the document.

Tables

- Tables can help summarise key information in a document.
- If tables will be cross-referenced throughout the document, or if a list of tables will be included with the contents, then number tables so they are consistent with the heading hierarchy. A simple method is to use the chapter numbers; for example, 'Table 4.1: Common design elements'.
- The font for labelling tables should be consistent throughout the document and smaller than that used for the main body of text.
- A table must always be cross-referenced to the content of the document to ensure the reader links the two, and the reference should be made before the table is presented.

Page size and layout

There are numerous considerations when it comes to page size and layout. The orientation of the page is often determined by the purpose of the document and what it is intended to contain (for example, some tables present better in a landscape layout). Margins and indentations dictate how much white space is included in a document, and this can affect its readability. Here are some aspects of page size and layout that you need to consider.

Margins/ indentations

- Margins should provide balance between the left and right side of the page, and the top and bottom of the page. Consider extending top and bottom margins if headers and footers are very detailed.
- You may be tempted to adjust margins to include more text in less space, but if margins are too narrow, the document can be difficult to read.
- Indenting paragraphs can help highlight text. In print, lists and bullets can be indented by at least one level from the main text to create contrast.
- Break-out boxes or side panels can be a helpful tool when providing related information that cannot easily be incorporated into the main body of text. Break-out boxes are often used in training material to give practical tips and case studies.

Page orientation

- Portrait and landscape are the most commonly used orientations in complex documents. You can switch between the two formats in a document; for example, displaying text in portrait format and displaying tables in landscape format.

Page size

- Different page sizes are used for different types of documents and requirements. For example, a flyer that is going to be posted in a standard window-faced envelope may be in DL size. Posters for display may be A1 size, while reports are usually printed on A4 paper.
- If you are choosing a non-standard page size that will be distributed electronically, ensure recipients will be able to print the document easily if they need to. Some printers need to be adjusted to print documents of a non-standard page size.

White space and colour

Colour creates visual interest in a document and can also be used to highlight key information. For example, 'Warning' might be written in red font. White space makes a document easier to read and helps to break up text.

Here are some guidelines for using white space and colour in a document.

Using white space

Using space between paragraphs and increasing the amount of space between headings and text makes your document easier to read. You can also separate sections using a page break.

Consider using white space around illustrations, lists or tables.

You can also widen margins to increase the white space on a page.

Using colour

Use colour changes sparingly for greatest effect and consider how the colours work together. Check to make sure the contrast text is legible against background colours.

Graphics containing several data series will often use a range of colours for interpretation. Depending on the colours available and background colours, different patterns (as opposed to colours) may be more effective.

Remember that using colour in a document has cost implications, especially if you are using a commercial printer: costs increase with the number of colour separations used.

If the audience needs to print the document themselves, consider whether they will have access to a colour printer. If you are emailing an advance copy of a report, most users will print it on a black-and-white printer, and the colour effect will be lost. In any case, it is good practice to check how your document appears in grey scale by printing it on a black-and-white printer.

For accessibility, you should always ensure that colour is not the only means by which you communicate a piece of information. Use extra strategies such as annotation and style elements such as shape and size.

Visual communication

Different people absorb information in different ways.

People who prefer information through listening and absorbing the context of how it is presented are referred to as auditory learners. Visual learners are helped by visual representations and may be more likely to think in pictures. Tactile (or kinaesthetic) learners prefer to experience what they are learning, so learn best through activities or role-play.

Because people take in information differently, it is important to use a variety of methods to communicate with your readers. Including some visual representation of data – whether a graph such as a bar or pie chart, photograph, illustration or summarising table – can support key arguments and messages in a way that text cannot.

Illustrations, diagrams, graphics and images

If used properly, visual representations can enhance a message and make your document more appealing and easier to read.

Photographs, for example, can work with text to increase understanding as well as to break up chunks of text. Graphics and diagrams can be used to summarise data and trends.

Ideally, all illustrations, diagrams, graphics and images should be cross-referenced to the content in the document. Use numbered labels for illustrations and photographs when cross-referencing to the document, or when the material will be listed with the contents.

For example, if you include a graph that illustrates an increase in sales, caption it as 'Figure 1' and cross-reference it in the text by saying: 'The company has seen an increase in sales (see Figure 1)'. This helps the reader make the necessary link between the image and the text.

Use the chapter numbers followed by a sequence number (such as Illustration 4.1: Positioning graphics) for easy reference.

Some documents require a specific approach to the use of images. For example, in a formal report, photographs might need to centred beneath a block of text and surrounded by a plain border or white space. Or they might need to be positioned in the centre of a block of text, surrounded by the words, for dramatic effect. Presentation slides may need to be formatted in such a way that text appears on the left and the photos on the right.

Types of graphics

Before deciding on your graphic, it is important to be clear about what the information is telling you. Review the key points you wrote when organising your information. Often, this will help you decide what sort of graphic to use. Ensure your graphics serve a purpose and are not simply to beautify your document. Some suggestions for how to use different graphics are given in the following.

Diagram

- Represents a concept
- Used to show prioritisation of tasks in a training manual

Photo

- Represents actual situations
- Shows product features in a tender submission; demonstrates current situation in a client visit report

Clip art and illustration

- Adds visual interest; represents a concept
- Supports bullet points in a PowerPoint presentation to staff; supports explanations in a training manual

Table

- Summarises detailed information, particularly when there are different measures
- Provides detailed specifications for a range of products

Flow chart

- Shows a process or sequence of events
- Summarises a reporting process in a training manual

Column graph

- Compares data across categories
- Compares expenditure versus budget in different departments

Line graph

- Displays trends over time
- Different lines may represent different regions or products

Pie chart

- Displays contribution of each category to the total; use when values can be added or there is only one series, all with positive values
- Represents customer satisfaction results by level of satisfaction

Scatter (or X–Y) chart

- Compares pairs of values; to demonstrate correlation between two factors
- Shows relationship between experience of employees and customer satisfaction result

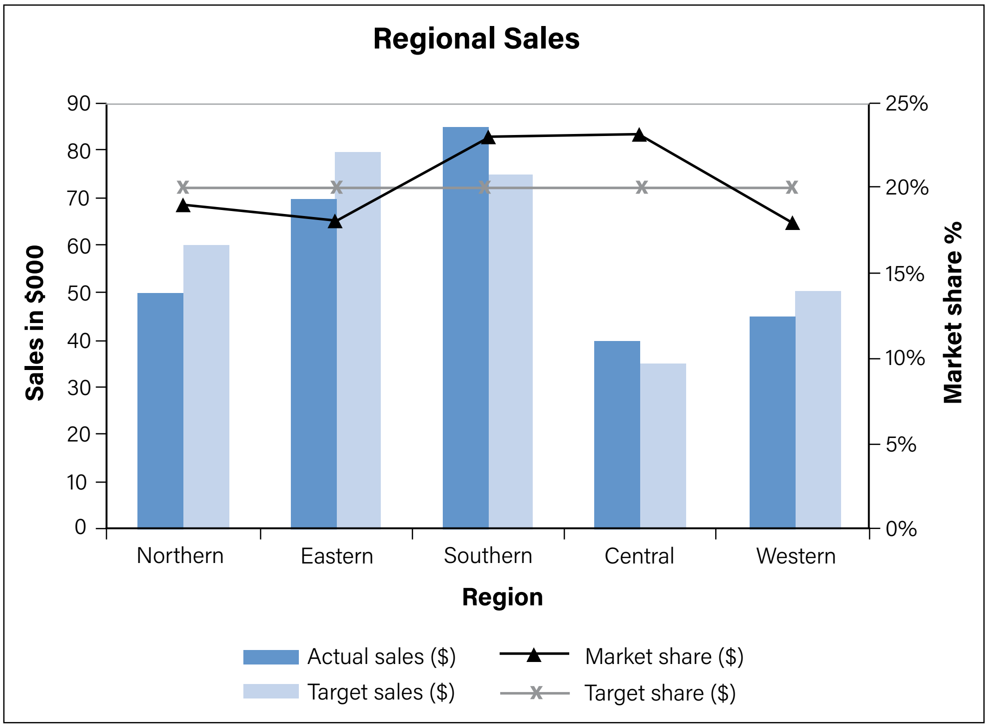
Bubble chart

- Compares three series of values
- Shows relationship between experience of employees, customer satisfaction result and sales performance to target

Example

Combining graphs

Some types of graphs can be effectively combined to represent more complex information; for example, a column and line graph may be combined. This often requires using different scales on two Y-axes as shown in the following example. The column graph represents sales by region, with a dollar figure on the Y-axis, while the line graph shows market share, requiring a separate Y-axis on the right-hand side to show percentages. Use these kinds of graphs selectively, when you know that you can explain them clearly to your audience, or they are familiar with this kind of presentation.



Web design

People read documents on the internet differently from written text. For example, they typically scan web pages, rather than reading them in detail. For these reasons, it is important to pay attention to web design principles.

Web design element considerations
▪ Colour: Text must be easy to read against background colour.
▪ Font: Use common, sans serif fonts of at least 12 points. Unusual fonts will display differently on some computers.
▪ Graphics: Choose file type and size to display quickly and at an appropriate resolution.
▪ Headings and sections: Use these extensively to break up information.
▪ Links: Must use different colours for unvisited, visited and active links that are easily distinguished against background colours.
▪ Paragraphs: Keep these shorter than you would with print documents.
▪ Textual contrast: Different font sizes, bold and italics are most effective. Limit blinking text to short phrases or warnings.

Example

Choose design elements

Simon is formatting the presentation for Jesse to deliver to the automotive repair chain. Here is how Simon selected appropriate design elements for his submission.

Adapting the format

Simon decides to use his organisation's corporate colours as a guide for his presentation. Since there is no standard template, he designs one himself so he can use it again for subsequent presentations.

He decides that he will display their logo on the bottom right-hand corner of each slide. On the left-hand corner of the slide template, he includes the date of the presentation. Since the logo is dark blue with silver edging, he decides to make the background of the slides blue, and to use yellow font so it can be clearly distinguished on the screen.

Choose design elements continued...

Creating links

For slides with graphics, Simon displays text on the left-hand side, with the graphic on the right. He realises the slides with pie charts are more effectively displayed with the text on top, but retains the other format for the column graphs and photographs.

Simon has structured the written submission with numbered heading hierarchies. Since there is some introductory company information in the presentation, he cannot use the same section numbers, but decides to use the same headings in the presentation.

Tables and photos

After some negotiation, Simon receives the agreed pricing for his submission. He enters the changes into his table, checking them carefully, and updates the table in his control document. Simon is still waiting for the sample uniforms Mario has promised, so he cannot photograph them for inclusion in the final submission. He updates the control document with the date he expects to receive the samples and his plan to have a marketing contact photograph them the following day.

Column graph

After discussion with Jesse about some of the standard information included in a tender submission, Simon is adding to his submission a section that provides information about the company performance compared with industry standards. As part of this, he prepares a column graph that shows the firm's performance as one series and the industry average as another, which Jesse will discuss as part of the presentation.

Practice Task 10

Question 1

Which of the following are guidelines for formatting documents? Tick all that apply.

- ◯ Use several colour changes to gain impact and for contrast against the text.
- ◯ Use at least a 10-point serif font for printed text and a 12-point sans serif font for web text.
- ◯ To create interest, vary the type of design elements such as numbers, letters and bullet lists indented to three or four levels.
- ◯ Limit the subsets of headings to a maximum of five in a document.
- ◯ Blocks of text may be centred for visual impact, particularly in promotional material.

Question 2

Which of the following statements are correct? Select yes or no for each one.

a) Illustrations, diagrams, graphics and images should be cross-referenced to the content in the document using numbered labels.	» Yes	» No
b) Ensure your graphics serve a purpose and are not simply to beautify your document.	» Yes	» No
c) Auditory learners benefit from graphics as they are helped by visual representations and may be more likely to think in pictures.	» Yes	» No
d) Photos are effective when used to represent a concept or show prioritisation of tasks in a training manual.	» Yes	» No

3E Check the final document

Multiple people working on a single document, according to a deadline, can lead to mistakes, such as spelling mistakes, incomplete sentences and formatting errors, so a final check of your document is important.

If you are responsible for editing and proofreading your document, this final check is essential. However, if the approval and review process included an editing and proofreading check by another person – and you are confident the document is free of errors – it is not necessary to complete this final check.

Substantive editing

Substantive editing involves a review of the following:

- clarity
- completeness of information
- document structure
- language used and its appropriateness to the audience
- legal requirements
- repetition of information
- style used and its appropriateness to the audience
- usability of the document compared with its stated purpose.

Copyediting

Copyediting typically occurs after substantive editing and involves a review of the following.

Language use

- Review text for overall clarity. Make sure you consider your audience carefully when assessing clarity, including their general education level and knowledge of the subject matter.
- Correct any remaining spelling and grammar errors. These may have been identified in earlier reviews; however, amendments and revisions may have created new errors, so it is worth repeating the review at this stage.

Consistency

- Confirm that language is used consistently. If you have been following a style guide for spelling, capitalisation and other language points, then check that all language follows this guide. Other elements that may be affected include hyphenation, abbreviations, choice of spelling, and overall style and tone.
- Finally, check that the formatting has been applied consistently throughout the document. Have you applied heading hierarchies consistently? Is there a consistent use of white space? Are lists and tables formatted similarly? These types of checks will help ensure your layout looks professional and the reader is not confused or distracted by inconsistencies.

References

- Check cross-references, such as '… shown in Table 1.3'. If you have used automatic links for cross-references, refresh the links before completing these checks. You should refresh these links whenever you make a change to a label or cross-reference. Check that any web links are still current.
- If a particular style of referencing, such as the Harvard style, is required, check that all references follow this style; otherwise, check the same style has been applied consistently. Make sure sources have been acknowledged and that any copyright requirements have been followed.

Document completeness

- Depending on the nature of your document, you may need supporting sections, including:
  - covers and text for covers
  - executive summary
  - footnotes and endnotes
  - appendices
  - lists of abbreviations, key terms or a glossary
  - references or bibliography
  - index or table of contents
  - copyright or library classification data.

Section completeness

- It is often easier to compile sections when the main body of the text is complete, so ensure that you allow enough time to prepare and review these documents. Ensure information in these supporting sections is consistent with the main body of the text, in terms of presenting the same data, following the same style guidelines and a similar format. Do a spot check on information in reference documents against the body of the text.
- Check the executive summary very carefully. Some members of the audience may read this but only scan other material. Errors could therefore have a significant impact on these readers.

Functionality

- It is embarrassing for a speaker using a PowerPoint presentation to find that it does not display as expected, or supporting audiovisual material fails. Check these elements of a presentation carefully.
- For internet documents, review a test site before the documents are activated. Check the links are functioning correctly and that any file downloads are working. It is also useful to ask someone who has not been involved with the project to do these types of checks for you. They can bring 'fresh eyes' to the document.

Proofread the document

Proofreading aims to identify errors at a detailed level.

It can be difficult to identify errors in your own document, so consider asking a colleague with good literacy to proofread it for you or hire a professional proofreader.

Here are some concepts relating to proofreading that you need to bear in mind.

Editing versus proofreading

There will often be some overlap between the editing and proofreading process. Even if you are completing both reviews yourself, you must complete them separately, as you are reading for different things at each stage. Editing is primarily about the content, structure and style of the document, while proofreading aims to identify errors at the detailed level.

Proofreading approvals

You may find that you repeat the proofreading process if there are several levels of approval for your document. This will vary depending on who is reviewing your document, but in general, you would prefer your reviewers to focus on identifying opportunities to better achieve the document purpose. Proofreading a document before circulating it can remove distracting errors and enable the reviewer to focus on these opportunities.

Marking up changes

It can be easier to proofread a document in printed form. Mark up any errors to be amended in the source document. If you are checking an on-screen document, keep a list of errors for the website provider. Some software applications allow reviewers to suggest changes that can be accepted or rejected by the author using Review>Track Changes.

How to check for errors

Here are some ways to check for errors when you are proofreading.

Checking for accuracy

You should repeat the check for accuracy if you have made any amendments, and conduct spot checks to help consistency. Consider having a subject matter expert check any specialty areas.

If you have been making progressive amendments to the document, check them against any written notes to verify that all amendments are incorporated and correct.

Proofing the layout

Ensure that the layout of the document is consistent. For printed documents, check each page using the print preview function. Is each section, table, list and illustration consistent? Do you need to adjust any tables to make sure they aren't separated by a page break? Are illustrations and their captions on the same page?

If you have developed content for a website, simulate the display to check the layout. How does the content look on the page? Do you need to make any final adjustments to make the content more appealing or readable?

Checking spelling and punctuation

Spelling and punctuation errors should have been captured in the editing process. If the document was edited by someone else, confirm that there is no deliberate reason for what might appear to be an error. Editors often develop a style sheet for a document, which documents their editorial decisions. Proofreaders should use this when finalising the document. If a style sheet doesn't exist and the query cannot be resolved using the style guide, query the editor or use a reliable source such as a dictionary before making any final changes to your document.

Ensuring conformity to specifications

Check against organisational or your chosen style guide specifications. You may also need to comply with design specifications, which may include directions on layout, spacing across a page, location of file-tracking information or many different formatting requirements.

Checking cross-references and links

Ensure the captions, headings, page numbers, tables, illustrations and graphics and their sequences are all correct, and links are working. Bear in mind some software applications restart page numbers with each new section, which can create several pages numbered 'Page 1' in a single document.

Checking printing and collation requirements

If you are responsible for printing and collating the document you may need to check whether it needs to be printed in colour. Does it need be stapled or presented in a folder? How many copies do you need? Do some people need multiple copies of the document for record-keeping purposes? It is easy for things to go wrong if you hurry this stage, so allow sufficient time to check and carry out these requirements.

Example

Checking the final document

Review checklist	Yes	No
Does it achieve the document purpose?		
Does it fulfil the expected outcome or purpose? (e.g. staff learn how to use equipment, senior management understand options, customers understand benefits)		
Is the language appropriate for the audience and the method of communication?		
Does it conform to length requirements (e.g. number of pages, number of words)?		
Have you used the correct template?		
Have you conformed to style guide requirements? (e.g. formatting, style, structure)		
Does it conform to the principles of effective business writing such as: ▪ clear and simple vocabulary ▪ active voice ▪ appropriate tone?		
Does the text flow and is it logically sequenced?		
Have you met referencing standards; for example, bibliography and acknowledgments?		
Are your files an appropriate size and type for your chosen format?		
Is the overall content appropriate to the audience's knowledge and skill level?		
Is there sufficient information to achieve the document's purpose?		
Have you completed all necessary internal reviews of the text?		
Have you made all required amendments suggested by the reviewers including adding text?		
Have you reviewed formatting for consistency?		

Checking the final document continued...

Review checklist	Yes	No
Have you asked a colleague or associate to read the document?		
Have you saved the draft versions with a file name that you and others can recognise?		
Are graphics clear, effective and appropriately placed in the surrounding text?		
Have you checked for spelling, grammar and style errors?		
Have you completed all necessary internal reviews of the content and required amendments suggested by the reviewers?		
Have you arranged for the document to be proofread?		

Practice Task 11

Question 1

Identify at least three features of the following processes:

- Substantive editing
- Copyediting
- Proofreading

Summary

- Review draft text carefully to ensure it meets the document requirements.
- Check the grammar, punctuation, spelling and style of a document before circulating it for approval; this will help reviewers focus on the content and key messaging in the document, rather than minor errors.
- Organisational requirements and processes for approving documents vary. Documents may need to be approved for content, formatting, layout, legal compliance and style.
- Circulate documents for approval in order of increasing seniority. Enter changes progressively, retaining any marked-up copies as reference until the document is fully approved.
- If used properly, visual representations including graphs, charts, drawings and photographs can enhance a message and make your document more appealing and easier to read.
- Ask reviewers to sign an approvals sign-off sheet; you can use the sign-off sheet later if you need to justify why something was or was not included in your document.

Learning Checkpoint 3
Finalise complex document

Part A

1. Draw a line to match the method of visual communication to the most appropriate purpose on the right.

» Flow chart	» To summarise detailed information
» Line graph	» To show a sequence of events
» Pie chart	» To compare data across categories
» Column graph	» To display trends over time
» Table	» To illustrate the contribution of multiple categories to the total

2. When reviewing draft text, identify at least one question you need to ask about the suitability of the document for each of the following:
   - audience
   - purpose
   - format
   - structure.

3. Which of the following statements are correct? Select yes or no for each one.

a) Punctuation marks are used to separate elements in sentences.	» Yes	» No
b) In Australia, business organisations must use US spelling.	» Yes	» No
c) Reading a document out loud can help the author identify any errors with document style.	» Yes	» No
d) Serif fonts have small tails or features on the ends of the letter strokes.	» Yes	» No
e) There should be no more than six subsets of headings in a document.	» Yes	» No
f) The font used for a table heading should be smaller than the font used in the main body of the document.	» Yes	» No
g) Capitalising all the letters in a word or heading should be avoided in professional documents.	» Yes	» No

Part B

Seb works as a data analyst at GoFast, a large courier company. He has almost finished the final draft of a business report outlining the changing nature of GoFast's customer base. He now needs to seek approval from four senior GoFast personnel before he can finalise and distribute the document to stakeholders.

1. How can Seb ensure the timing for the approval and review process?

2. Seb has received some feedback on one section of his report regarding some information he provided and IT issues. The reviewer, Ally, is an IT specialist. What steps should Seb follow to incorporate the amendments?

3. Seb's report has now been approved by all relevant personnel. One of the final things he needs to do is to proofread the document. Seb is proofreading the *layout* of the document. Identify three things Seb should look for when he does this task.

4. Describe four possible design elements to enhance Seb's document and meet the purpose of the document.