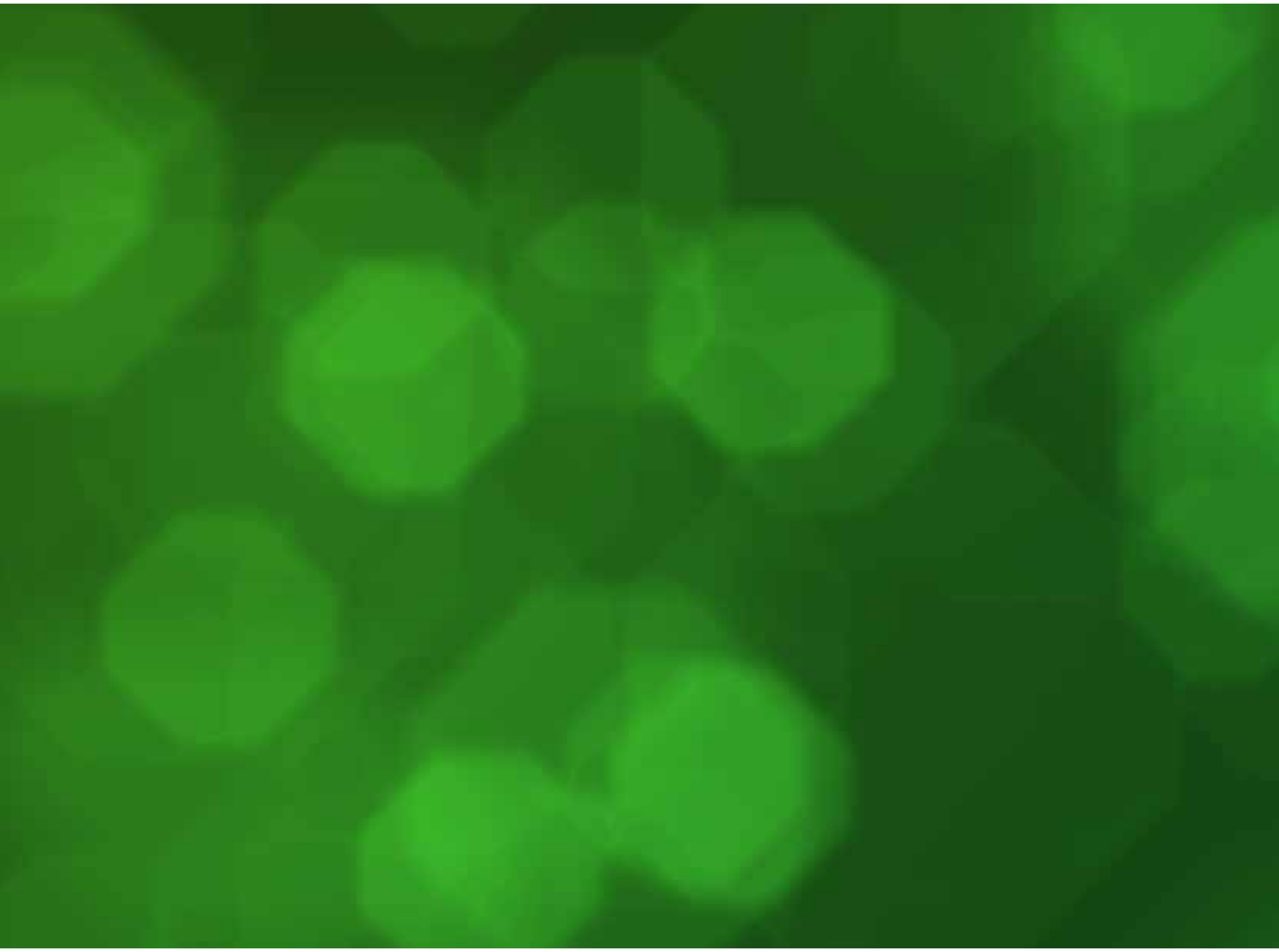
BSBITU306 Design and produce business documents

Release 1



Learner guide

aspire learning resources

BSBITU306
Design and produce business documents

Release 1

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Aspire Version 1.1

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BSBITU306 Design and produce business documents Release 1

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Contents

Before you begin

This learner guide is based on the unit of competency *BSBITU306 Design and produce business 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 and case studies	Examples of completed documents that may be used in a workplace are included in this learner guide. You can use these examples as models to help you complete practice tasks and learning checkpoints. Case studies highlight learning points and provide realistic examples of workplace situations.
Practice tasks	Practice tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
Video clips	Where QR codes appear, learners can use smartphones and other devices to access video clips relating to the content. For information about how to download a QR reader app or accessing video on your device, please visit our website: www.aspirelr.com.au/help
Summary	Key learning points are provided at the end of each topic.
Learning checkpoints	There is a learning checkpoint at the end of each topic. Your trainer will tell you which learning checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.

Foundation skills

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

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

Foundation skill area	Foundation skill description
Reading	• Recognises and interprets textual information from a range of sources to determine and adhere to requirements • Applies strategies to self-correct and verify clarity and conformity of information
Writing	• Develops documents using required format, accurate spelling and grammar and terminology specific to requirements • Organises content to support purposes and audience of material, using clear and logical language
Oral communication	• Confirms requirements with relevant personnel using specific terminology and listening and questioning techniques
Navigate the world of work	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	• Selects and uses appropriate conventions and protocols when communicating in a range of familiar work contexts
Get the work done	• Uses basic features and functions within applications to access, store, organise data and perform routine 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 Select and prepare resources	1A Select and use appropriate technology and software applications	❑ Confident ❑ Basic understanding ❑ Not confident
	1B Select layout and style of publication	❑ Confident ❑ Basic understanding ❑ Not confident
	1C Ensure consistency of design with company and/or client requirements	❑ Confident ❑ Basic understanding ❑ Not confident
	1D Clarify format and style	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 2 Design the document	2A Identify, open and generate files and records	❑ Confident ❑ Basic understanding ❑ Not confident
	2B Design the document to maximise the presentation of information	❑ Confident ❑ Basic understanding ❑ Not confident
	2C Use a range of functions to design the document	❑ Confident ❑ Basic understanding ❑ Not confident
	2D Operate input devices	❑ Confident ❑ Basic understanding ❑ Not confident

Topic	Key outcome	Rate your confidence in each section
Topic 3 Produce the document	3A Complete document production within designated time lines	❑ Confident ❑ Basic understanding ❑ Not confident
	3B Check documents for style and layout	❑ Confident ❑ Basic understanding ❑ Not confident
	3C Store and save documents	❑ Confident ❑ Basic understanding ❑ Not confident
	3D Overcome basic difficulties with document design and production	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 4 Finalise the document	4A Proofread the document prior to final output	❑ Confident ❑ Basic understanding ❑ Not confident
	4B Make modifications	❑ Confident ❑ Basic understanding ❑ Not confident
	4C Name and store the document, and exit the application	❑ Confident ❑ Basic understanding ❑ Not confident
	4D Print and present the document	❑ Confident ❑ Basic understanding ❑ Not confident

Topic 1
Select and prepare resources

To produce a business document, you must first select the most appropriate technology and software application for the task.

You also need to consider the requirements of your organisation regarding information entry, layout, style, output, quality and storage. Organisations often have detailed specifications to make sure all documents are of an acceptable professional quality and in line with the organisation's visual identity.

If you are preparing a business document for a client, you must ensure the design is consistent with the client's requirements, and that the format and style are clearly specified by the client before you produce the document.

In this topic you will learn how to:

1A Select and use appropriate technology and software applications

1B Select layout and style of publication

1C Ensure consistency of design with company and/or client requirements

1D Clarify format and style

1A Select and use appropriate technology and software applications

All organisations design and produce business documents to communicate and organise information. These documents can be for internal or external clients and contain information about all aspects of the business.

You need to be able to identify the different types of business documents within your organisation, which may include the following.

Newsletters	A newsletter is a document that is published periodically. It can be used to make an announcement, such as the appointment of a new staff member, circulate news, such as an article on current research the organisation is doing, and may also contain photographs and text. Email newsletters, often referred to as e-news, are an excellent way to communicate with internal and external clients. They are also a good way to save on postage and paper, though you must ensure that you comply with the Australian regulations for sending bulk emails.
Client databases	A client database stores information about customers in a structured way. It usually has the names and addresses of customers and details of any products and services they may purchase. A database uses fields, records and tables to organise this information. It allows an organisation to store, modify and extract information (such as a telephone number) about one client or many. A client database is a powerful tool and it might be your responsibility to design and use one.
Proposals	A proposal is a business document that outlines how an organisation can produce a product or service for another organisation. For example, if an organisation wants to supply a cleaning service, it would outline the details of its service in a proposal and submit it to the potential client. A proposal can also be used to apply for a government grant. In this case, it would contain information about why the grant is needed, what purpose it will serve and how much money is required. A proposal is always a written offer to accomplish an objective in a particular way for financial gain.
Reports	A report is a written document that describes the findings of an individual or group. For example, a research officer has to write reports that describe what their research has discovered. A report can be used to communicate information to internal and external clients. Reports are one of the most common types of business documents. Whatever your role, you will most likely have to write or read an organisational report.

Accounts statements	An accounts statement contains information about the specific assets, liabilities and fund balances of an organisation. It helps an organisation understand how well it is doing financially. Accounts statements are often used to make decisions. For example, a financial statement that details the profitability of a product, would be used to make a decision about whether to continue with the production of that product or not. Accounts statements are needed for taxation purposes. When the taxation department audits an organisation, it needs to produce all of its accounts statements.
Project reviews	A project review describes the progress of a project. A project can run for 12 months or longer and it needs to be reviewed at certain intervals to make sure that it is on budget and on time. Project reviews are usually written by the project manager and presented to management. They are then used as a basis for decisions about the project. For example, management might decide to hire more people if the review shows that the project has met with an unexpected workload and is running behind time.
Web pages	A web page is a page from the web (internet). It is displayed using a web browser and may contain text, illustrations, motion graphics and interactive media. It may also contain hypertext links to allow navigation from one page, or section, to another. Web pages are used extensively by organisations to advertise products and/or services. They are also used to help clients make an online purchase. This is called e-commerce.

Use business technology

Every organisation uses some sort of technology. It is important to know what is available in your workplace and to use it appropriately. You might need to make choices about:

- business equipment
- business software.

Business equipment

Most organisations depend on business equipment to operate. The most common piece of equipment in the office is the computer, which is used to input, process and output business information.

You might also have to use printers, scanners and photocopiers. Descriptions of the functions of each of these types of business equipment are provided here.

Printers
A printer is a device that produces a paper copy of the information displayed on the monitor of your computer. There are many different printers available. The main differences are the speed at which material is printed, the quality of the print, the options available and the cost. Your organisation may have several different printers and you will have to make a decision about which one is most appropriate for your use. For example, does your document need to be printed in colour, or black and white? Do you need to print on one side or both sides of the paper? Printing usually involves a number of decisions. Before you press the 'print' button, you need to consider the specific requirements of your task, the software application you are using and the capabilities of your printer. You may have various options for printing. For example, in Microsoft Project you can choose to print a project overview, a summary of tasks or just the milestone tasks. If you are printing a spreadsheet, you may wish to print it at actual size, or scale it down to fit on one page.

Scanners
A scanner is a device that produces a digital version of a hard-copy document. For example, if you scan the hard-copy version of a report into a computer, you can send the information electronically or make alterations before reprinting. A scanner can be a useful piece of equipment if you are producing a newsletter, catalogue or any other document containing photographs, illustrations, maps or handwritten material. It can copy a selected image into a graphic file on a computer. This can then be imported into the document you are working on. The image can be re-sized, if you need to make it smaller, or cropped if you only want to keep part of the image. There are two primary types of scanner: • a flat-bed scanner that is connected to your computer but stands alone • a scanner that is incorporated into a fax machine and/or photocopier. A flat-bed scanner can scan most images as it caters for many different sizes, from a photograph to a map. The other type of scanner is not as flexible and is most suited to single-sheet documents up to A4 size.

Photocopiers
Photocopying is a process that makes a paper copy of a document, or any other visual image, quickly and cheaply. If an organisation needs multiple copies of a document, a photocopier is the most suitable equipment to use. Documents such as price lists, product information and internal reports often need to be copied and sent to customers, or stored for employee use. Because people use photocopiers so frequently, it has prevented most offices from becoming totally paper free. Try to use the photocopier in your organisation wisely and save paper.

Business software

Wherever you work, you will have to use business software, which is made up of a series of instructions that make a computer do tasks. Software is also called a program.

There are two major categories of software: system software and application software. System software supports the production or execution of an application program but is not specific to any particular application. An example of system software is the Windows operating system. Application software performs a more useful function, as it processes or manipulates data. Examples of application software are Microsoft Word, Access and Excel.

Here are the main types of application software that are used in a business environment.

Business software applications

1

Word-processing software

Word-processing software is used to create, store and print documents. You can type and edit text, and insert graphics, to create documents that can be easily saved. Any document that involves written information is usually created using word processing software.

Word-processing software can save documents in multiple output formats depending on the user requirements. Typically these are hard-copy printouts, but web-based formats such as hypertext mark-up language (html) can be used or portable document formats (pdf).

A commonly used word-processing software is Microsoft Word.

2

Spreadsheet software

In accounting, a spreadsheet is a large sheet of paper that displays the financial position of a company. It spreads, or shows, all of the information (such as costs, income and taxes) on a single sheet of paper and organises information into columns and rows. Spreadsheet software records and processes information in the same structure. For example, a spreadsheet showing accounting transactions could group data in areas such as accounts payable, accounts receivable and payroll. The data can then be manipulated by a formula to give a total or sum.

Spreadsheets present a lot of information in an easy-to-read format, and can help decision-makers see the big picture of an organisation.

A commonly used spreadsheet software is Microsoft Excel.

3

Database software

A database is an organised body of related information. Database software organises information in such a way that it can quickly select the desired piece of data.

Data is organised by fields, records and tables.

A field is a single piece of information; for example, a client's surname.

A record is one complete set of fields; for example, a client's complete name and address.

A table is a collection of records; for example, every client's name and address.

A database allows an organisation to store, modify and extract information about customers and products. For example, you can extract information about all clients who live in a certain area from a database of client details.

A commonly used database software is Microsoft Access.

4

Presentation software

Presentation software is frequently used by presenters to give a clear visual display of the points covered in a talk. It can also be used to create slide shows or multimedia presentations.

It usually includes three major functions:

- The slide show system to display content
- An editing tool that allows text to be moved around from slide to slide
- A graphics system for quickly drawing charts and graphs

A commonly used presentation software is Microsoft PowerPoint.

5

Accounting software

There are many commercial accounting software packages available. These enable financial records and reports to be recorded and generated electronically. Compared to a manual accounting system, commercial accounting software enables much more extensive and reliable record keeping and a vast array of reporting options to be generated readily.

Some organisations use a commercially available accounting package such as Mind Your Own Business (MYOB) or QuickBooks, which they tailor to suit their own organisational requirements. Some organisations use accounting software specifically designed for use within the particular organisation type, such as schools or hospitals.

Choose appropriate technology

You need to choose appropriate technology for each job. Always start with the outcome. What do you want to produce? The type of technology you use should always depend on the types of documents you want to produce. For example, you would use presentation software to develop a slide show presentation. It would not be appropriate to complete this task in Word.

A single job can sometimes require a selection of business software and business equipment. For example, you might be asked to design a slide show presentation for your manager and supply a hard copy of the speech. To achieve this you would need to use both presentation and word-processing software. You would also need to use a printer to print out the speech.

Practice task 1

Imagine that you have to produce the documents in this table. Fill in the type of business equipment and/or software you would need for each one.

Type of document	Business equipment/software
A hard-copy version of a report containing text and financial statements. Some of the information for the report is only available in hard copy and some alterations still need to be made.	
An e-newsletter, including text and photographs, which also includes statistical information extracted from client details.	
A proposal to another organisation, to be presented in the boardroom by your manager to the organisation's owner. Your manager requires some notes in hard copy.	
A database of client information.	

1B Select layout and style of publication

The layout and style of a publication is critical to its impact on the reader, just as the contents are.

If a business document is difficult to read because of poor design features, its contents are less likely to make any impact on the reader of the document. The reader may be distracted by poor layout instead of concentrating on understanding the content.

Layout and styles

The layout and style of a publication will depend on what the organisational requirements are for the particular document type. Any document you create must fit the specifications of your organisation. It is a good idea to find a sample before you start. By looking at the sample and asking about the specifications, you should be able to work out exactly what layout is required.

For example, your organisation might have a preferred layout for business reports, which will require using the following guidelines for structure and format.

Structure

- Begin with an outline.
- Follow this with bullet points covering the major issues.
- End with a report summary.

Format

- Use a particular font type and size (such as Times New Roman 12 pt).
- Use a certain colour and style for headings (such as black and bold).
- Make sure paragraphs are double-spaced so the report is easy to read.

Minutes of meetings

The full block style of minutes of meetings is shown below.

Information contained in minutes
• Type of meeting, place, date and time • Name of the Chairperson and names of persons present (Chairperson first, then in alphabetical order) • Apologies • Confirmation of Minutes of the previous meeting • Matters arising from the Minutes of the previous meeting (if any) • Other matters such as reports, correspondence, business discussion • The time the meeting was closed • Space for the Chairperson to sign and date (to be completed during the next meeting)

Example: meeting minutes

Minutes of the eighth Annual General Meeting of the North Sydney Squash Club held at the club rooms, McLaren Street, North Sydney, on Tuesday 16 February 2016 at 7.30 pm

Present

Cameron Strong (Chairperson)
Diane Crookes
Harold Dentener
Barbara Barry (Secretary)

Apologies

Apologies were received from Carol Burnett.

Minutes

Minutes of the seventh Annual General Meeting were read, approved and signed as a true and correct record.

Election of officers

It was resolved that the present officers be re-elected for a further season. Moved by Harold Dentener, seconded by Diane Crookes.

Subscriptions

It was resolved that subscriptions be increased by 10 per cent for the new season. Moved by Barbara Barry, seconded by Harold Dentener.

Tournament entries

It was agreed that tournament entries are very high and it was suggested that Cameron Strong raise this point at the next regional meeting.

The meeting concluded at 8.30 pm.

Chairperson: Date:

Fax form

A fax form is used to send information to another department, branch or company through a facsimile (fax) machine. Field codes can be inserted (by pressing Ctrl F9) to enter variable information.

A cover sheet is the first sheet of the fax and contains:

- who the fax is to – the name of person and company
- who the fax is from
- the fax number you are sending the fax to
- the date of the fax
- your fax number (this is often printed at the top of the sheet)
- the number of pages including the cover, so the receiver knows how many pages have been sent.

Example: facsimile

Facsimile	
To:	Office manager
Company:	Robert Yates & Co Ltd
Fax:	378 9056
From:	Julia Donaldson
Date:	12 May 2016
Subject:	Installation of Software
No. of pages:	(incl. cover) 1
Further to the purchase of your computer equipment yesterday, I wish to confirm that I will be at your office at 9.00 am tomorrow to install your Office 2013 program.	

Templates

There are many templates for business forms which can be downloaded from Microsoft Office Online. Go to the website http://office.microsoft.com and select **Templates**. There you can download a variety of pro-forma documents such as agendas, brochures, business cards, faxes and flyers. Alternatively, in Microsoft Word 2013, click on the **File** tab, select **New** and click through the selected searches to find the template you want. Select the template and click **Create** on the right-hand side to download.

Identify organisational requirements

Most organisations have requirements for the layout and style of documents. Meeting these requirements helps achieve a professional quality and ensures all documents are produced in a consistent format. You should identify these requirements before you design your document.

The information itself often has to follow a certain format to be accepted. For example, postcodes must have four numbers, customer IDs must have the right combination of numbers and letters, and customer balances must have a currency format.

The layout and style requirements of a publication may also be influenced by factors such as budget restrictions. For example, a fixed budget may mean that annual reports can't be printed in colour or presented in binders. Another example would be a company preparing a promotional brochure using plain paper rather than heavy-duty card or glossy paper.

Organisational quality assurance and/or procedures manuals also dictate the layout and style applicable to business documents. For example, there may be documented procedures within your organisation that are about having a consistent layout of agendas, business letters, minutes of meetings or annual reports and using a specific style of presentation.

Example: report specifications

This report has been developed to fit certain design specifications.

Report on paper usage

Overview

Paper usage has reached an all-time high with twice as much paper being ordered per month as was ordered at the same time last year. This report outlines strategies to reduce paper wastage.

Main points

- All printers purchased are to have double-sided printing capacity.
- Printing from all terminals is to be tracked by the printer and each department made aware of its monthly paper usage.
- Budget for paper consumption is to be reduced.
- Staff are to communicate using email rather than written memos.

Summary

Our goal is, with the assistance of these changes, to bring about a 25 per cent reduction in paper usage. Up-to-date figures and costs for paper consumption will be released in one month.

Practice task 2

Look at the report in the previous example and answer the following questions.

1. The main sections in the report are easy to read. How was this achieved?

2. The report has three sections. What are they?

3. The overview of this report has to stand out from other sections. How was this achieved?

4. What do you observe about the layout of the document?

1C Ensure consistency of design with company and/or client requirements

Inputting information into the computer is just the beginning. Once you have entered the relevant data, you must organise the content and structure. This is called designing a document and each task will be different. It all depends on the type of document you are working on and the requirements of your workplace.

The document you are designing needs to be prepared using consistent design principles in line with organisational or client requirements. Consistent design ensures that the layout of the content flows smoothly and the final presentation is professional. Consistent design techniques should be used in the following features of your document.

Headings

Use a font and font size for a major heading so it will inform the reader of the focus of the page/document. Headings should be large enough for easy reading and can be centred, left aligned or right aligned. There is usually only one major heading but sometimes there is a major subheading also (which should be in a smaller font size).

Subheadings are a transition from the major heading to body text and make it easy for readers to locate information. Subheadings are usually in bold and in a smaller font size than the major heading/s.

Lists

Numbered and bulleted lists can have less spacing between items and more above and below the list.

Borders and lines

Borders and lines can be added to documents. Again, spacing must be consistent – if you insert a 12 pt space (or one **Enter**) before one line, then the next line must have the same amount of spacing used.

Spacing

Variations can occur; for example, the spacing between a bulleted list could be reduced to 3 pt or 4 pt if it is necessary to fit text on a page, or spacing after subheadings could be reduced.

Punctuation and capitalisation

It is important that punctuation is consistent throughout, including such things as the use of single or double quotation marks, and whether items in a list are separated by a comma or not. Capitalisation in headings must be consistent; for example, in this unit only the first letter of headings are capitalised. This style of capitalisation is called minimal capitalisation.

Paragraphs and alignment

Paragraphs help break up the text and keep ideas organised. Some paragraphs are typed so they start from the left margin of the page. This style of paragraph is called left aligned. Others are indented so each new paragraph starts a few spaces in from the left margin. Like headings, paragraphs may be aligned to the left, to the centre or to the right. They may also be justified, which means that the text and often the spaces between words are stretched to create a consistently shaped block of text.

Margins, indentations, headers and footers

Ensure margins are the same, as well as the indentation of paragraphs. Use the headers and footers features of Microsoft programs to ensure consistency of headers and footers throughout your document.

Design tips

Following are some more design tips.

Experiment

Spend time experimenting with different document layouts, if you can. Word-processing programs make this easy to do; you can save your attempts with different file names until you arrive at the ideal layout or use the Undo function. The proportions of the publication need to be considered so that graphics and text are well balanced on the image, and the impact of both is considered.

Be appropriate

Ensure appropriateness; that is, that the document relates to the content of the publication and the people who will be reading it. For example, an advertisement for a clothing sale would have a totally different appearance to a company report.

Proofread

Proofread (check) the document for mistakes. You can use the spellcheck in your word-processing process but it's also a good idea to get someone to review your document. You should proofread the text and check that the style of the document is consistent with your workplace's house style.

Practice task 3

This document has numerous design and layout inconsistencies. Highlight the inconsistencies and explain why you think it is an inconsistency.

Cardiopulmonary resuscitation (CPR)

If someone is unconscious, check for signs of breathing.

Dial 000 for an ambulance.

If person is not breathing:

Turn them on their back

Tilt their head and lift their jaw

- Ensure the airway is open.
- Pinch nose closed.
- Take a deep breath and seal your lips around the person's mouth.
- Give two breaths
- See if the chest rises.
- Remove your mouth and allow the chest to fall.

o Start chest compressions

Position one hand on the centre of the chest

Grasp wrist with other hand

Compress breastbone 4 to 5 cm or one third the depth of the chest

> Continue with 2 breaths to 30 compressions

> Rate of compressions is 100 per minute or almost 2 per second

dO nOT sTOP uNLESS:

Help arrives

Person breathes normally

You're totally exhausted.

1D Clarify format and style

You have already learnt about the importance of the consistency of the format and style of the business document you are preparing. Looking at an existing sample of a document previously created is a good place to start with your preparation. Then once you have developed a plan it is advisable to clarify your plan with the end user of the document or with someone who can represent them. You need to be clear about the purpose of the document and the audience you are targeting.

Purpose and audience

Before designing a document, you need to think about who you are communicating with and what information, or message, you are trying to convey.

You should always clarify the purpose of the document. What type of document is it? What is it meant to do? It may help to put these thoughts in writing; for example, 'This document is a presentation to outline my work progress.' A single sentence stating the purpose of your document can help to focus your writing.

You also need to clarify the intended audience of the document. Is it for a large or small group? Is it for your colleagues or external clients? Knowing and understanding your audience will influence the way you design the document. It should also influence the way you portray your intended message. You need to think about what you want your audience to know, what your audience needs to know, and what your audience already knows.

Here are some principles of design to keep in mind.

The principles of good design, when creating a document
• Distinguish primary (important) from secondary (additional) ideas. • Set off examples from the text. • Draw attention to headings. • Draw attention to certain parts of a document. • Make information easy to find. • Arrange every element to lead the eye progressively from one part to the next. • Provide visual relief by including artwork and white space. • Use a consistent style throughout the document.

Clarify format and style

A lot of time can be wasted by not clarifying the format and style of the proposed document with the person requesting the publication. It may be that they need guidance as to the principles of good format and design. Show them samples of other publications and explain the options available for different styles. Ask them questions about what they have in mind and make constructive suggestions for improvements. Be certain to clarify exactly what you have discussed and agreed on.

Example: report design

The following example shows the same report designed in two different ways.

Report on paper usage **Overview** Paper usage has reached an all-time high with twice as much paper being ordered per month as was ordered last year. This report outlines strategies to reduce paper wastage. **Main points** • All printers purchased to have double-sided printing capacity. • All printing to be tracked by the printer and each department made aware of its monthly paper usage. • Budget for paper consumption to be reduced. • Staff to communicate using emails rather than written memos. **Summary** It is hoped that these changes will bring about a 25 per cent reduction in paper usage. Up-to-date figures and costs for paper consumption will be released in one month.	Report on paper usage Overview Paper usage has reached an all-time high with twice as much paper being ordered per month as was ordered last year. This report outlines strategies to reduce paper wastage. Main points All printers purchased to have double-sided printing capacity. All printing to be tracked by the printer and each department made aware of its monthly paper usage. Budget for paper consumption to be reduced. Staff to communicate using emails rather than written memos. Summary It is hoped that these changes will bring about a 25% per cent reduction in paper usage. Up-to-date figures and costs for paper consumption will be released in one month.

Practice task 4

Read the two reports from the previous example.

1. Which report is easier to read?

2. Describe the design principles used in the first report.

3. Describe any design problems you can identify in the second report.

Summary

1. Business documents communicate and organise information.
2. Select appropriate technology and software applications to produce the business documents your organisation requires.
3. The layout and style of a document is critical to its overall appearance and clarity. It has to be prepared in accordance with organisational requirements.
4. The document design must be consistent with organisational or client requirements and have all the features of basic design principles.
5. Prior to preparing the documents, clarify the format and style with the person requesting its publication.

Learning checkpoint 1
Select and prepare resources

This learning checkpoint allows you to review your skills and knowledge in selecting and preparing resources.

Part A

1. Choose four types of business documents from the seven listed in this topic. Write one paragraph about each document, including the purpose of each document.

2. Four pieces of business equipment are available in an organisation:
   - A computer
   - A scanner
   - A photocopier
   - A printer

   Decide which piece(s) of equipment to use in each situation in the following table.

Situation	Equipment needed
A hard-copy report needs to be reproduced 10 times.	
A hard-copy photograph needs to be put into an e-newsletter.	
A proposal needs to be written and 50 copies made.	
A hard-copy accounts statement needs to be updated and emailed to an accountant.	

Part B

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

Case study

Moira works as an executive assistant. Part of her role is to prepare documents for her manager, who is going to make a presentation to all staff next week. He has asked Moira to develop the presentation, including the presenter notes.

Moira found the organisation's style guide for developing presentations and designed the information accordingly. She used consistent design principles throughout the document. She prepared presenter notes and made a hard copy. The presentation included some photographs that Moira had to scan before she could include them on slides.

1. List the types of business equipment that Moira would have used to design the presentation.

2. List the types of business software that Moira would have used to design the presentation.

3. How did Moira make sure that the style of her presentation met with the requirements of her organisation and that she used consistent design principles throughout the document?

4. Explain why multiple business technologies are usually needed to develop a business document.

Part C

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

Case study

Eleni works as an office administrator in a large organisation. One of her duties is to design presentations. These are sometimes for the board of directors and sometimes for her colleagues.

One day Eleni was asked to put together some information describing the progress of a new project. Eleni assumed this information was for her colleagues. She wrote a detailed report outlining the project's progression.

When the time came for the document to be used, Eleni discovered that it was for the board of directors, who had little knowledge of the new project! They prefer visual presentations rather than the text-based documents, as they don't have the time to read them. Eleni had no time to change the document.

1. Eleni did not design the document for the intended audience. What might the consequences be?

2. Eleni should have clarified two points before beginning her task. What are the two points?

3. Explain why it is important to clarify the purpose and audience of a document before design begins.

Topic 2
Design the document

To design a business document you need to consider a number of things. First, you have to input some information. This is usually done using a keyboard and mouse, and sometimes the numerical keypad on your keyboard and/or a scanner. It is important to use these devices both quickly and efficiently.

It is also important to follow some basic design principles. If you do this, your documents will always be visually distinct, attractive and easy to understand. Identifying the purpose and intended audience of your document will also help you design a document that communicates its message in the right manner.

Formatting the document is also important. There are a number of software functions that can make this task a lot easier.

You may also need to access other files and records to create your document. You need to know how to identify, open and generate these files and records according to task and organisational requirements.

In this topic you will learn how to:

2A Identify, open and generate files and records

2B Design the document to maximise the presentation of information

2C Use a range of functions to design the document

2D Operate input devices

2A Identify, open and generate files and records

Business documents are developed from records that are stored in files. A record is a piece of information about an organisational issue; for example, photographs, database records, accounts statements or written reports. A file is a collection of similar records; for example, a collection of board meeting minutes or accounts statements. A report may contain information gained from accounts or departmental records.

Manage files and records for document use

Different organisations have different records and files. It all depends on the information needs of the workplace. The important thing is that they are properly managed. Organisations need to create, update and store their files in suitable locations so that they can be easily accessed and maintained.

Managing records and files properly improves the efficiency and productivity of the workplace. It also safeguards vital information and provides better support for management decision-making.

To successfully manage records and files, you need to be aware of:

- your responsibilities
- how to create a new record or file
- how to update a record or file.

Your responsibilities

If one of your duties is to manage records and files, you need to be aware of how your organisation wants you to organise, create, maintain and store them.

It is also important to know the subject and purpose of the record or file. For example, if your organisation has a file full of records about software purchases you should know why that information is needed. The software file may be part of the organisation's assets register or it might need to be located in the same place as the other software records. If they are financial records, such as invoices, they might need to be kept for taxation purposes.

You should be aware of any security requirements regarding records and files. For example, is the file confidential? Who is authorised to have access? You also need to know where records and files should be stored, so that they can be easily retrieved.

Create a new record or file

Organisations constantly require new information about their clients or products. To generate this new information you need to be able to create new records and files. These might include:

- a new record for an existing file
- a new file and new records.

If you are naming a new file you must consider the names of files that already exist. This is the only way to ensure consistency and prevent duplication. Your organisation may have a file classification system that sorts files by codes or ID (identification) numbers. If this is the case, you may need to generate a new code or ID number for the new file.

File and record information

Once you have created a new file, you need to make sure you have all the relevant records in the file and that they contain adequate information. All files and records are created because of an organisational need and if they do not fulfil this need they may not be useful.

It is also important to place records in the appropriate file and store the files in the right place, so that everyone can access and retrieve them as required. This might mean registering the file on the company's database so that employees can search for and find it easily.

When creating records and files you also need to think about the different types of information you are dealing with. Make sure that information meant only for you is kept separate from official information.

Practice task 5

The steps in this table are for creating records and files. Number the steps from one (1) to six (6), where one is the first step and six is the last. Explain why you have put the steps in this order.

Steps for creating records and files	
	Keep personal records and files separate from official records and files.
	Place files where they can be easily accessed.
	Create records that contain appropriate information.
	Identify a need for creating a new record or file.
	Register the file on the organisation's database.
	Name records and files to ensure consistency with existing documents and to prevent duplication.

2B Design the document to maximise the presentation of information

Efficient entry of information helps to streamline the overall process of document preparation. If you have all of the information you need at hand prior to commencing, you can sort it into a logical sequence.

Set aside a realistic amount of time to prepare your document. If you rush or stop and start the preparation frequently, you are more likely to make mistakes and the document may not flow in a logical sequence.

In order to maximise the presentation of information you might consider applying or customising a particular theme for your document. This entails formatting an entire document with a theme to give it a professional and modern look. A document theme is a set of formatting choices that include a set of theme colours, fonts (including heading and body text fonts) and effects (including lines and fill effects).

Programs such as Microsoft Office Word, Excel and PowerPoint provide several predefined document themes, but you can also create your own by customising an existing document theme, and then by saving it as a custom document theme. Document themes are shared across Microsoft Office programs so that all of your documents can have the same, uniform look.

Enter information efficiently

There are two main components to entering information efficiently. The first is making sure you have everything you need at hand, so you don't have to stop and search for more information. This is a way to maximise your efficiency as the author of the document. Sometimes you might even be able to copy information from another business document. If you were compiling a report on expenditure, for example, you might be able to copy key figures directly from the accounting package or records spreadsheet.

The second is ensuring that the information is presented in the most appropriate way, so that a reader of your document does not need to stop and think in order to understand it. This is a way to maximise the efficiency of the document for the reader.

Allow a realistic amount of time

It is essential that you allow a realistic amount of time to prepare your document.

Instead of making a plan for the best-case scenario, you should consider worst-case scenarios you can't control; for example, the printer or photocopier breaks down, or someone else needs to use them at the same time.

If adequate time is not allowed, then:

- the document will not be prepared in time
- important information may be left out
- incorrect information will be included; for example, the sales figures for the wrong quarter.

Maximise the presentation of your document

Many organisations have a particular corporate style that they use for all their business documents. This ties the organisation's documents together and makes them look professional when presenting to clients and to suppliers.

Some aspects of the presentation that might be mandated by your organisation:

- The font (and size) of text in the document
- The colour, size and font of headings
- A cover sheet (for word documents) or background image (PowerPoint)
- Format and colour schemes for images and tables

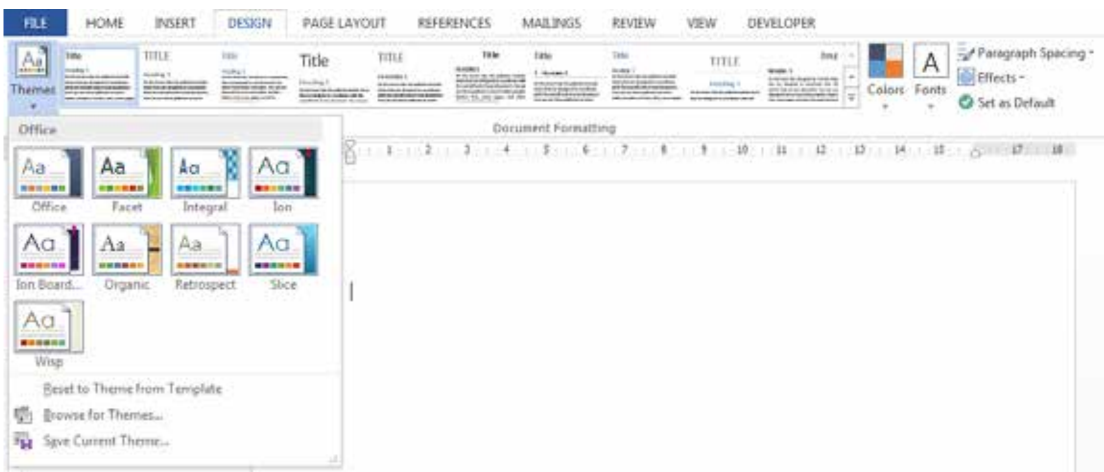
Design techniques

You can change the document theme that is applied by default in Office programs by selecting another predefined document theme or a custom document theme. Document themes that you apply immediately affect the styles that you can use in your document. A style is a combination of formatting characteristics (such as font, font size and indentation) that you name and store as a set. When you apply a style, all of the formatting instructions in that style are applied at one time.

Apply a document theme

In order to apply a predefined theme, the following steps should be taken.

1. In Word or Excel: on the **Design** tab, in the **Document Formatting** group, choose **Themes**.



2. In PowerPoint: on the **Design** tab, in the **Themes** group, click the document theme that you want, or click **More** to see all available document themes.

   In PowerPoint, you can apply a document theme to all slides, to selected slides only or to the master slide. Right-click the document theme, and then click the option that you want.

3. To apply a predefined document theme, click the document theme that you want to use under **Office**.
4. To apply a custom document theme, click the document theme that you want to use under **Custom**.

Note: Custom is available only if you created one or more custom document themes. For more information about creating custom document themes use the help feature on the Microsoft program you are using.

5. If a document theme that you want to use is not listed, click Browse for Themes to find it on your computer or a network location.
6. To search for other document themes on Office Online, click Search Office Online.

Customise a document theme

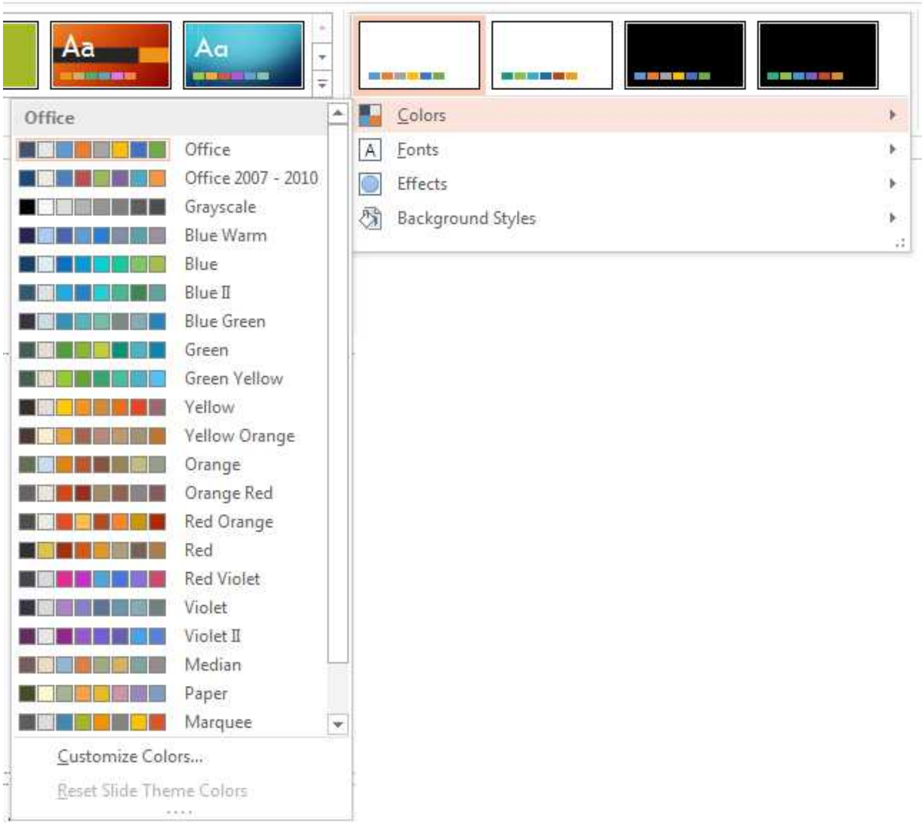
To customise a document theme, you start by changing the colours, fonts or line and fill effects that are used. Changes that you make to one or more of these theme components immediately affect the styles that you have applied in the active document. If you want to apply these changes to new documents, you can save them as a custom document theme.

Customise the theme colours

Theme colours contain four text and background colours, six accent colours and two hyperlink colours. Some of the colours used in the current theme are shown on the **Theme Colors** button  and next to the Theme name after you click on the **Theme Colors** button. When you change any of these colours to create your own set of theme colours and the colours that are shown in the **Theme Colors** button and next to the **Theme Colors** name will change accordingly.

1. In Word or Excel: on the **Design** tab, click **Colors** to select a colour theme. 

2. In PowerPoint: on the **Design** tab, in the **Variants** group, click **More**  to select a colour theme.

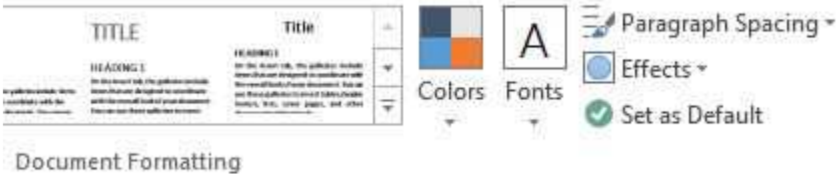


3. Click on **Customize Colors**.
4. Under **Customize Colors**, on the Design tab, click the button of the theme colour element that you want to change.
5. Under **Customize Colors**, select the colours that you want to use. Under **Sample**, you can see the effect of the changes that you make.
6. Repeat steps 4 and 5 for all of the theme colour elements that you want to change.
7. In the **Name** box, type an appropriate name for the new theme colours.
8. Click **Save**.
9. To return all theme colour elements to their original theme colours, you can click **Reset** before you click **Save**.

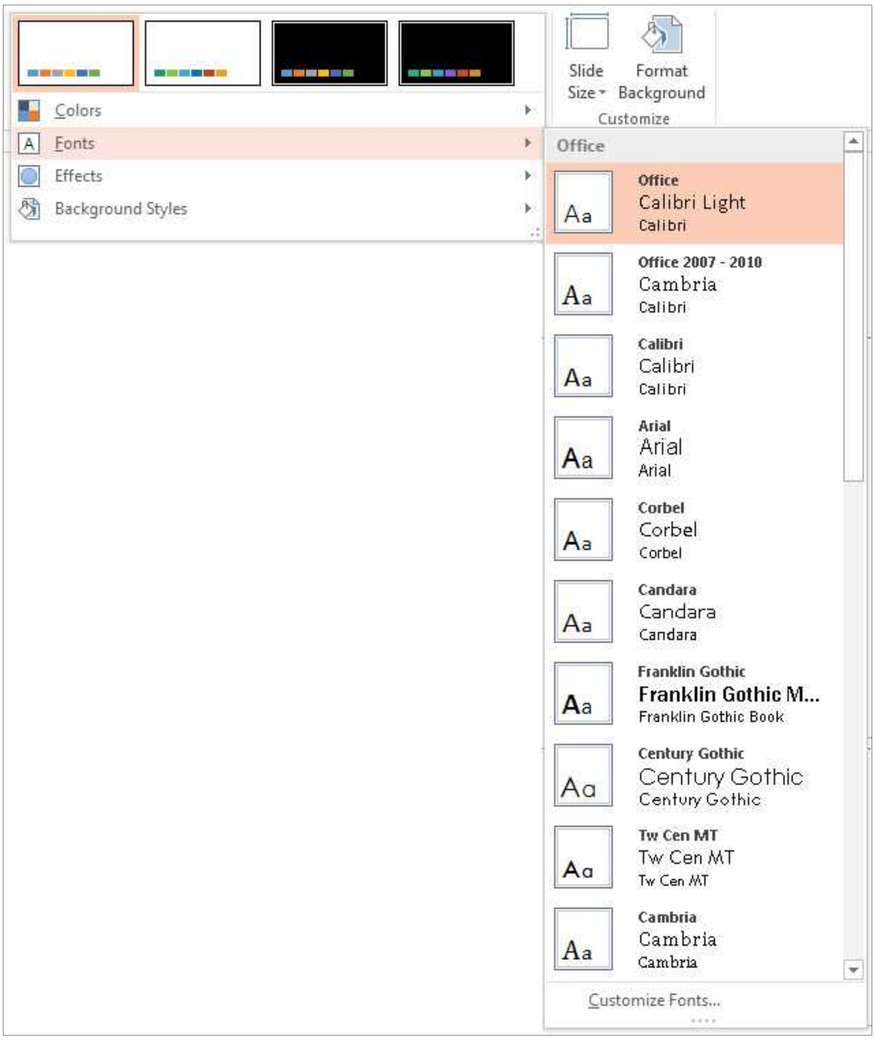
Customise the theme fonts

Theme fonts contain a heading font and a body text font. When you click the **Theme Fonts** button, you can see the name of the heading font and body text font that is used for each theme font below the **Theme Fonts** name. You can change both of these fonts to create your own set of theme fonts.

1. In Word or Excel: on the **Design** tab, in the **Document Formatting** group, select a font.



2. In PowerPoint: on the **Design** tab, in the **Variants** group, select **Fonts**, then **Customize Fonts**.

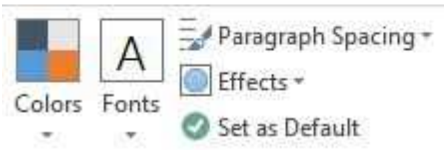


3. In the **Heading font** and **Body font** boxes, select the fonts you want to use. The sample is updated with the fonts that you select.
4. In the **Name** box, type an appropriate name for the new theme fonts.
5. Click **Save**.

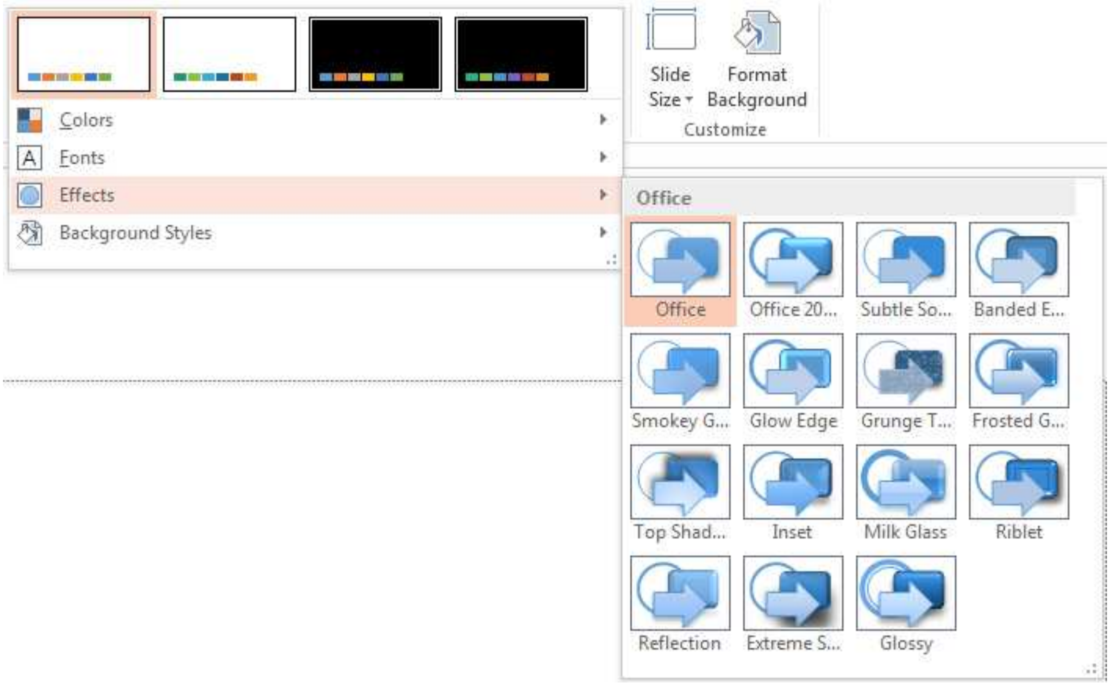
Select a set of theme effects

Theme effects are sets of lines and fill effects. When you click the **Theme Effects** button, you can see the lines and fill effects that are used for each set of theme effects in the graphic that is displayed with the **Theme Effects** name. Although you cannot create your own set of theme effects, you can choose the one that you want to use in your own document theme.

1. In Word or Excel: on the **Design** tab, in the **Themes** group, click **Effects**.



2. In PowerPoint: on the **Design** tab, in the **Variants** group, select **Effects**.

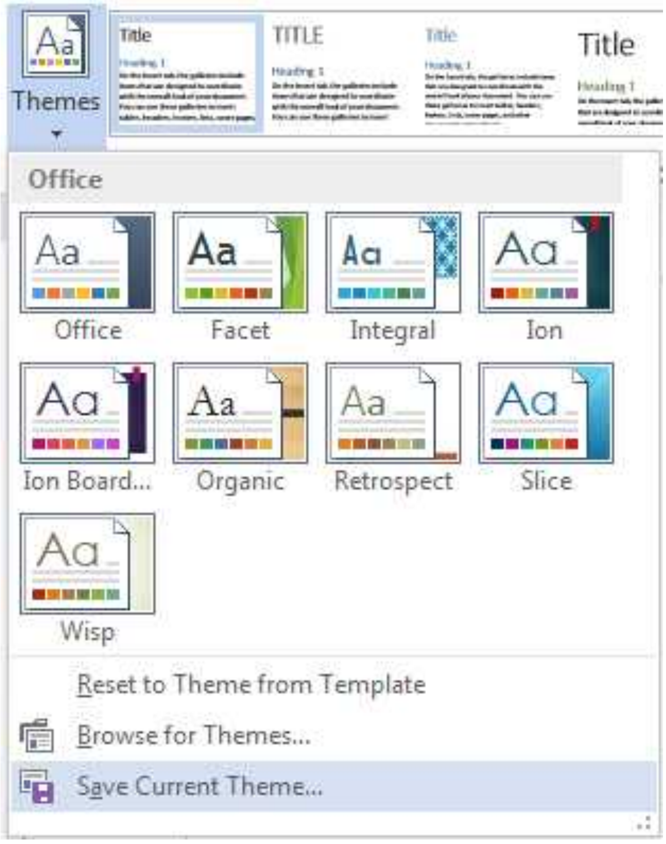


3. Select the effect you want to use.

Save a document theme

Any changes that you make to the colours, fonts or line and fill effects of a document theme can be saved as a custom document theme that you can apply to other documents.

In Word or Excel: on the **Design** tab, in the **Themes** group, click **Themes**, then **Save Current Theme**.



1. In PowerPoint: on the **Design** tab, in the **Themes** group, click **More** .

2. Click **Save Current Theme**.
3. In the **File Name** box, type an appropriate name for the theme. A custom document theme is saved in the **Document Themes** folder and is automatically added to the list of custom themes.

Practice task 6

Set aside at least 30 minutes to use the features described in this section on a business document of your choice. Select your document and apply a document theme either using a predefined or custom document theme. You can use Microsoft Word, Excel or PowerPoint to do this. Practise changing the colours, fonts, and line and fill effects that are used in the original document using the instructions in this section.

2C Use a range of functions to design the document

Organising the content and structure of your document is the first step. Once you have designed a document, it needs to be formatted. For most documents, you will use a word-processing application, such as Microsoft Word, for this task. Within this program there is a range of functions to help make your work more consistent. In this section you will look at the software functions for:

- formatting text
- formatting styles
- headers and footers
- formatting tables
- merging and comparing documents, and tracking changes
- spellchecking and editing.

Format text

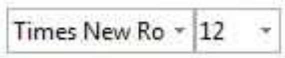
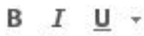
Formatting the text of a business document improves the overall appearance and presentation of the information. Although many software programs have formatting options, this topic will only describe the functions of Microsoft Word 2013.

Before going any further you need to find, or create, a Word document you can work on. Make sure it has at least eight paragraphs and is at least three pages long. It can be on any topic. It might even be an existing document from your workplace. You will use this document to complete some of the tasks. You will also be asked to work on it as you read through the topic.

If you do not have a document you can access, go to your local newspaper's website and copy a section of a news story to work on.

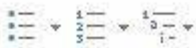
The Home tab

The following functions are found on the **Home** tab.

	The **Font** group allows you to change the font and size of selected text and numbers.
	The **Bold, Italic** and **Underline** functions allow you to perform these actions on selected text.
	The **Highlight** and **Font Colour** functions allow you to highlight text to stand out from the surrounding text or format selected text with a chosen colour.

The Home tab: paragraph group

The **Paragraph** group enables you to select the following functions.

	The **Align Left**, **Centre**, **Align Right** and **Justify** functions allow you to perform these actions on selected text.
	The **Numbering** and **Bullets** functions allow you to add numbers or bullets within selected paragraphs.
	The **Decrease** and **Increase Indent** functions allow you to indent the selected paragraph to the previous or next tab stop.
	The **Outside Borders** function adds or removes a border around the selected text.

Formatting styles

When using Microsoft programs, the word 'style' refers to a set of formatting characteristics that you can apply to text, tables and lists in your document to quickly change their appearance. When you apply a style, you apply a whole group of formats in one simple task.

There are three types of styles you can create and apply, as shown below.

Paragraph style

A paragraph style controls all aspects of a paragraph's appearance, such as text alignment, tab stops, line spacing and borders; it can also include character formatting.

Character style

A character style controls aspects of selected text characters within a paragraph, such as the font and size of text, and bold and italic formats.

Table style

A table style provides a consistent look to borders, shading, alignment and fonts in tables.

Change a style

The **Styles** group enables you to select or change the styles on an existing document. A style is created by selecting a number of different formatting attributes and naming the style. For example, you might:

- select Arial for a font
- choose size 14 (pt) for a font size
- make the style right-aligned
- colour the text green
- name the style 'Heading A'.

Your style, Heading A, can then be applied to any of the headings within your document without having to redo all the formatting selections.

Styles allow you to work quickly and consistently throughout a document. If you want to change the appearance of a style within the text, you simply modify the style properties and reapply the style.

Quick styles

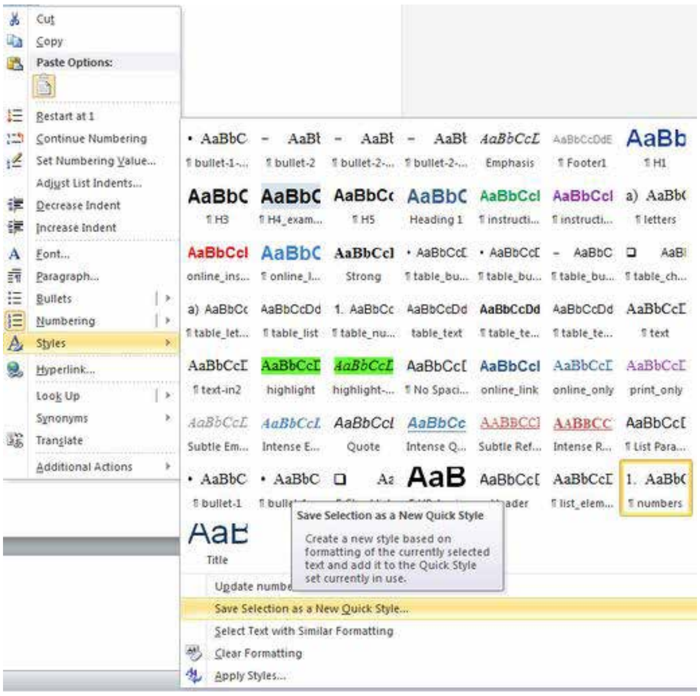
Quick Styles are sets of styles created to work together. Although a Quick Style set is likely to contain all the styles that you need to build a document, you may want to add a brand-new style. You can also create additional styles, such as a new table or list style. Use your selected document to practise selecting styles using the following procedure:

1. Select the text that you want to create as a new style.

   For example, perhaps you want the word ‘business’ to always appear as bold and red in your document.

2. On the **Mini** toolbar that appears above your selection, click **Bold** and **Red** to format the text.

3. Right-click the selection, point to **Styles** and then click **Save Selection as a New Quick Style**.



4. Give the style a name (for example, ‘Business’) and then click **OK**. The business style that you created appears in the Quick Styles gallery with the name you gave it, ready for you to use whenever you want text to be bold and red.

Change existing styles

Alternatively, you may want to change the existing style of your document. For example, to change the attributes of the Heading 1 style, select text that has the **Heading 1** style applied. Have a try on your existing document using the following steps:

1. Format the selected text with the new attributes that you want.

   For example, you might decide that you want to change the size for the Heading A style from 16 pt to 14 pt.

2. On the **Home** tab, in the **Styles** group, right-click the style that you want to change; for example, Normal.

3. Click **Update to Match Selection**. All text with the style that you changed will automatically change to match the new style that you defined.

If you changed the styles in a document and the styles are not updating the way you expected, click the **Styles** dialogue box launcher, and then click the **Style Inspector** button to find out whether text was manually formatted instead of formatted by using styles.

Headers and footers

Headers and footers are displayed at the top and bottom of each page in a document. They usually contain information about the document. This can include a single line of text, multiple lines of text, a table or graphics. Headers and footers commonly contain information such as the document's file path (or code), date and page number.

Often, there is a workplace standard about the information that goes in headers and footers. This ensures that all readers are aware of certain information about the document, such as when it was written or where it is located on the server.

The header and footer information can be contained within one section of the document, or can run through the entire document.

Add a header and footer

You are now going to add a header and footer to your Word document.

Follow these steps:

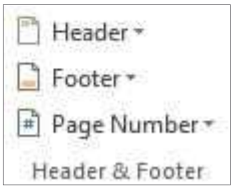
1. On the **Insert** tab, in the **Header & Footer** group, click **Header** or **Footer**.

2. Click the header or footer design that you want and type in text or select a built-in one.

Change a header and footer

You can **insert or change text or graphics** in headers and footers. For example, you can add page numbers, the time and date, a company logo, the document title or file name, or the author's name. To do this, follow these steps:

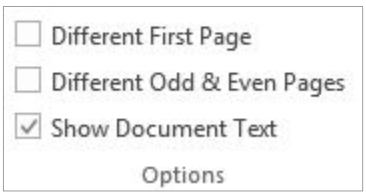
1. On the **Insert** tab, in the **Header & Footer** group, click **Header**.



2. Click **Edit Header**. This takes you to the **Header & Footer Tools** tab.
3. Insert text or graphics.
4. To save the header that you created to the gallery of header options, select the text or graphics in the header or footer, and then click **Header** as before. This time click **Save Selection** to **Header Gallery**.

If you want to change a header that you inserted, find the **Headers & Footers** group in the **Insert** tab, click **Header** as before, then select **Edit Header**.

You can also create a different first-page header and footer or add different headers and footers on odd and even pages. To do this, click on the appropriate selection in the **Options** grouping under the **Header & Footer Tools** tab.



To insert or change a footer, repeat these steps by selecting the **Footer** option in each step.

Format tables

Tables are used to display information within a document. A table is basically a grid of rectangles (or cells). Into these you can add text, numbers and graphics.

A table can be customised to suit the requirements of your workplace. They are frequently used in business documents to present figures in rows and columns, or to show related information side by side.

Some examples of customisation are listed below.

How to customise tables in business documents
• Adjust the width of the columns or the height of the rows. • Insert text, numbers or graphics in a cell and align it to the left, centre or right. • Fill a cell with a colour and/or a pattern. • Format the cell borders by adjusting the line style and thickness.

Insert a table

Use the **Insert** tab and select **Table**.

You are now going to insert a table in your Word document and enter some information. Follow these steps.

1. Move your cursor to the place in your document where you want to insert a table. If this is at the top of a page, leave enough space above the table for a label.
2. Select a table choosing at least three columns and four rows.
3. Enter information into your table. When you enter information into a cell it will wrap around to fit the width of the cell. The cell depth will expand to accommodate the information. Make sure each column of your table has a heading.

Practise moving your cursor from one cell to another by clicking the **Tab** key. To move your cursor back to the previous cell, just click on the cell, or press **Shift+Tab**. To create a tab within a table, use **Control+Tab**.

You should now have a table that contains information. It might look like the following table.

Title	Author	Price
War and peace	Leo Tolstoy	$35.00
A tale of two cities	Charles Dickens	$40.00
Pride and prejudice	Jane Austen	$25.00
Little women	Louisa May Alcott	$30.00

Select parts of a table

Before you can do anything with the information in a table, you need to be able to select the parts you want to format. One way to do this is to use the **Layout tab** under **Table Tools**, and then choose **Select**. This way you can select rows, columns and even the whole table with a single click of the mouse.

Following are some simple steps you can follow to select a group of cells.

Select block of cells

1. Move your cursor into the first cell to be included in the selection.
2. Click and drag over the required number of cells.

Select a row

1. Move your cursor to the left edge of the first row to be included in the selection.
2. Click and drag down the table to select the required number of rows.

Select a column

1. Move your cursor onto the top edge of the first column to be included in the selection. The cursor will change to look like a black arrow.
2. Click and drag across the table to select the required number of columns.

Select the whole table

1. Move your cursor to the top left-hand corner of the table. The cursor will show a four-arrow symbol.
2. Click the symbol and all cells in the table will be selected.

Resize columns and rows

Depending on the type of information you have entered into your table, you may need to resize columns and rows. There are two ways of resizing columns and rows. You can simply use your mouse to drag the table parts into the right size, or you can use the menu options.

You are now going to resize the columns and rows in your table. Follow these steps.

Using the mouse option	Using the menu option
1. Move your mouse onto the right edge of a column or the bottom of a row you want to resize. Your cursor will change into a two-headed arrow. 2. Click and drag the column or row to the required width or height.	1. Select a column to resize. 2. Select the **Layout** tab under **Table Tools**. Click on **Properties**. 3. Select the **Column** tab. Enter the column width into the **Preferred width** box. You may have to experiment with the correct size by looking at how the width change has altered your column. 4. Click on the **Previous Column** or **Next Column** buttons to change the width of adjacent columns. 5. Select a row and repeat these actions to modify its size.

Example: resize columns and rows

When you have finished, your table might look like the following example, where the columns have been resized to suit the information and save space.

Title	Author	Price
War and peace	Leo Tolstoy	$35.00
A tale of two cities	Charles Dickens	$40.00
Pride and prejudice	Jane Austen	$25.00
Little women	Louisa May Alcott	$30.00

Insert columns and rows

Business documents can alter as new information becomes available and old information becomes out of date. You may have to add or delete information entered into tables.

You are now going to insert a new row and a column into your table. Follow these steps.

Insert a row	Insert a column
Place your cursor in the last cell of a table and press **Tab**. OR: 1. Decide where you want to put the new information. 2. Select a row that is above or below the required position. 3. Select the **Layout** tab and the **Rows & Columns** group. 4. Select either the **Insert Above** or the **Insert Below** option. 5. Enter the new information.	1. Decide where you would like to put the new information. 2. Select a column that is to the left or right of the required position. 3. Select the **Layout** tab and the **Rows & Columns** group. 4. Select either the **Insert Left** or **Insert Right** option. 5. Enter the new information.

Delete columns and rows

You are now going to delete a row and a column from your table. Follow these steps.

Delete a row	Delete a column
1. Decide which row you want to delete and place the cursor in that row. 2. Select the **Layout** tab and the **Rows & Columns** group. 3. Select the **Delete** option. 4. Select the **Delete Rows** option.	5. Decide which column you want to delete and place the cursor in that column. 6. Select the **Layout** tab and the **Rows & Columns** group. 7. Select the **Delete** option. 8. Select the **Delete** Columns option.

Example: insert columns and rows

When you are finished you should have a table with a new row and a new column of information, like the following example.

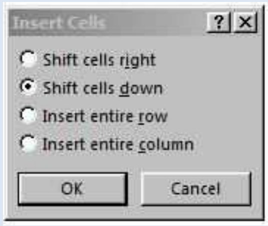
Title	Author	Price	Code
War and peace	Leo Tolstoy	$35.00	E23
A tale of two cities	Charles Dickens	$40.00	E24
Pride and prejudice	Jane Austen	$25.00	E25
Little women	Louisa May Alcott	$30.00	E26
Tender is the night	F Scott Fitzgerald	$25.00	E27

Insert or merge a cell

When working with tables, you may sometimes need to insert or merge a cell, perhaps to create room for a title or a heading. You are now going to insert and merge a cell in your table. Follow these steps.

Insert a cell

1. Select one cell in the first row of your table.
2. Select the **Layout** tab and the **Rows & Columns** group. Click the small arrow and select **Insert Cells** menu option.
3. You should see the following dialogue box.



4. Select **Insert entire row**. Click OK.

Merge a cell

1. Select your new row.
2. Select the **Layout** tab and the **Merge** group. Select **Merge Cells** menu option.
3. You should now have a row with one merged cell. Enter the title of your table into the new merged row.

Example: insert or merge a cell

When you have finished, your table might look something like the one below. This table has a title row created from a new merged cell.

Classic books			
Title	Author	Price	Code
War and peace	Leo Tolstoy	35.00	E23
A tale of two cities	Charles Dickens	40.00	E24
Pride and prejudice	Jane Austen	25.00	E25
Little women	Louisa May Alcott	30.00	E26
Tender is the night	F Scott Fitzgerald	25.00	E27

Format table content

To format the content use the **Font** group under the **Home** tab. Refresh your memory by re-reading this information.

You are now going to format the content of your table using the following specifications:

- Title: Arial 14 pt, bold, centre align
- Column headings: Arial 12 pt, bold, left align
- Content: Arial 10 pt, left align

The end result might look like the following example.

Classic books			
Title	**Author**	**Price**	**Code**
War and peace	Leo Tolstoy	$35.00	E23
A tale of two cities	Charles Dickens	$40.00	E24
Pride and prejudice	Jane Austen	$25.00	E25
Little women	Louisa May Alcott	$30.00	E26
Tender is the night	F Scott Fitzgerald	$25.00	E27

Add borders and shading

The appearance of a table can be enhanced by adding borders and shading. Your organisation may have a preference for this type of formatting.

You are now going to apply a border and some shading to the title row of your table. First, to apply a border, follow these steps:

1. Select your title row.
2. Select the **Design** tab.
3. Select **Borders** from the **Draw Borders** group.

4. Your title row should now have a border similar to this **Classic Books** example.
5. Next, to apply shading, follow the same steps as before but select **Shading** from the **Table Styles** group.

Merge and compare documents, and track changes

Business documents are often written by a number of people. Multiple people can also be involved in the edit. Tracking changes, and merging and comparing documents are useful techniques to help with this process.

To complete the work in this part of the topic, you need two identical documents. Make two copies of the Word document you are currently working on, and call them Document 1 and Document 2.

The **Track Changes** function is very useful if you want to revise or edit a document. It allows a person to insert, delete or move text or graphics and change the formatting. Microsoft Word uses revision marks to show these changes. The changes can then be reviewed and accepted or rejected by someone else.

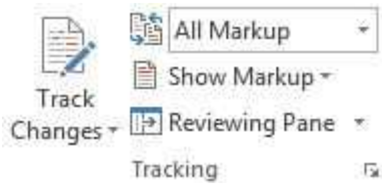
If you are going through this process in several copies of the same document (for example, there are several people involved in the edit), you can merge the different copies and capture all the tracked changes into one document when they have finished. This will give you one final document to edit at the end.

Track changes

You are now going to track the changes in your Word documents.

Follow these steps:

1. Open Document 1.
2. On the **Review** tab, in the **Tracking** group, click the **Track Changes** icon. Click the **Track Changes** icon to turn **Track Changes** on or off.

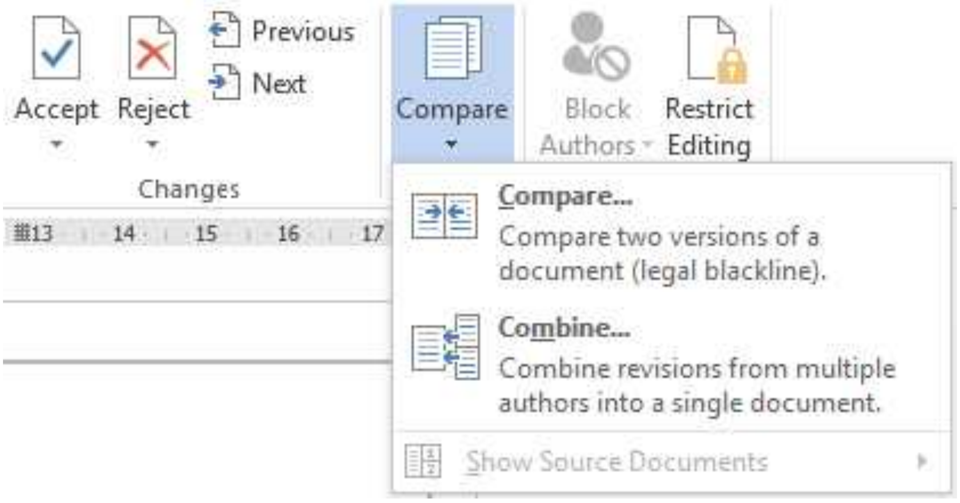


3. Make the changes that you want by inserting, deleting, moving or formatting text or graphics. You can also add comments. Word will track these changes as you make them. Save the changes and close the document.

Merge documents

If you send a document for review to several reviewers, and each reviewer returns the document, you can combine the documents two at a time until all the reviewer changes have been incorporated into a single document.

1. Open Document 2, then on the **Review** tab, in the **Compare** group, click **Compare**.
2. Click **Combine revisions from multiple authors.**



3. Under **Original document**, click the name of the document into which you want to combine the changes from multiple sources. If you don't see the document in the list, click **Browse for Original** .
4. Under **Revised document**, browse for the document that contains the changes by one of the reviewers.
5. Click **More**.
6. Under **Show changes**, select the options for what you want to compare in the documents.

   By default, Microsoft Word shows changes to whole words. For example, if you change the word cat to cats, the entire word cats will show as changed in the document and not simply the character 's'.
7. Under **Show changes in**, click **Original document**.
8. Click **OK**.
9. Word will merge all of the changes into the original document.

Word can store only one set of formatting changes at a time. Therefore, when you merge multiple documents, you may be prompted to decide whether you want to keep the formatting from the original document or use the formatting from the edited document. If you don't need to track formatting changes, you can clear the **Formatting** check box, which is a pull-down menu under **Show Markup**.

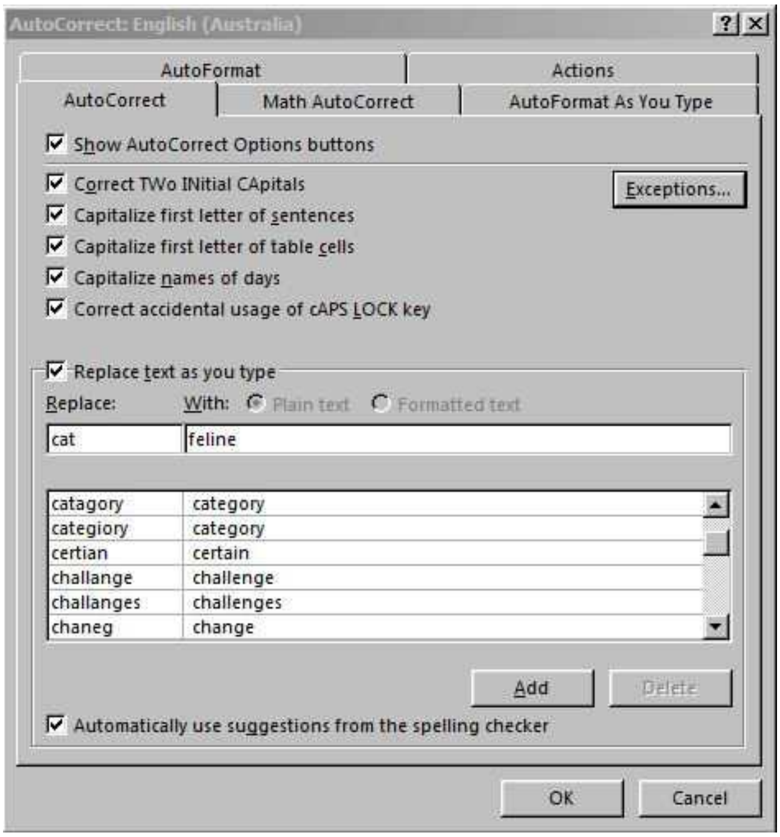
Spellcheck and edit

All business documents should be checked for spelling mistakes. Spelling and grammar mistakes can distract readers from the work you have put into your documents, so you want to eliminate these mistakes. Word can check the spelling as you type, or you can run a spellcheck separately to check the text of an existing document.

As well as using this convenient tool, you must also do a manual proofread of every document. Unfortunately, the Word spelling function can miss words that are not appropriate even though they are spelled correctly.

Spellcheck as you type (AutoCorrect)

The AutoCorrect feature can be a very useful function. It means that Microsoft Word will automatically alert you to the words you misspell. You can use the AutoCorrect feature to correct typos and misspelled words, as well as to insert symbols and other pieces of text. AutoCorrect is set up by default in Microsoft Word with a list of typical misspellings and symbols, but you can modify the list that AutoCorrect uses.



Beware of relying too heavily on AutoCorrect, particularly if you sometimes have to use unusual words that might look like errors.

Spellcheck

You may prefer it if none of the documents you create show any spelling and grammar errors.

1. Click the **File** tab and then click **Options**.
2. Click **Proofing**.
3. To turn on or off automatic spellchecking and automatic grammar checking for the currently opened document:
   - Under **Exceptions for**, click on the name of the file that is currently open.
   - Select or clear the **Hide spelling errors in this document only** and **Hide grammar errors in this document only** check boxes.
4. To turn on or off automatic spellchecking and automatic grammar checking for all documents that you create:
   - Under **Exceptions for**, click **All New Documents**.
   - Select or clear the **Hide spelling errors in this document only** and **Hide grammar errors in this document only** check boxes.

   If you turn off automatic spellchecking or automatic grammar checking for a file that you share with other people, you may want to notify those people that you made this change.

Check grammar

Proofreading a document also means checking the grammar. Although you can do this by yourself, Microsoft Word provides a useful grammar check that you can use.

The grammar check identifies errors in punctuation and the use of verbs. It also identifies any misused words or long sentences. It can check grammar as you type, or you can run the grammar check after you have finished writing the document. It can also be used to check the text of an existing document.

As well as using this convenient tool, you must also do a manual proofread of every document. Unfortunately, the suggestions made by the grammar-checking function are not always accurate, so you need to be careful about selecting changes.

Follow the same process for checking grammar as you did for checking spelling.

Practice task 7

1. This is your first chance to work on the Word document that you have found or created. Use the following basic formatting functions to complete these tasks. You do not have to save the changes in your document.
    - Select three different fonts and three different font sizes. Apply these to part of your document.
    - Bold, italicise and underline some of the sentences in your document.
    - Use the numbering function to list some of the sentences in your document.
    - Add a border to one sentence in your document.
    - Highlight one sentence in your document and change the font colour of another.
2. Find the **Page Number Format** dialogue box. Format the page numbers of your document so that they are in lowercase Roman numerals; for example, i, ii, iii.
3. Use the table you have just inserted in your document to complete the following tasks:
    - Select three cells in your table.
    - Select two rows in your table.
    - Select one column in your table.
    - Select the whole table.
4. Resize some rows and columns.
5. Merge some cells.
6. Format the content in the table.

2D Operate input devices

Input devices allow you to put information into a computer. They include some things that you may or may not have heard of, such as touch screens, light pens, microphones, bar-code readers, fax/modem cards and joysticks. This unit, however, will only consider three main input devices used in an office: the keyboard and numerical keypad, the mouse and the scanner. This topic will look at the keyboard and the mouse, and how these input devices can help you input information efficiently.

Keyboard

The keyboard is one of the primary peripherals on your system. Using a keyboard is the main way to input information for a business document. To use a keyboard efficiently you need to be confident and streamline your actions. Practice makes perfect. The more familiar you become with your keyboard, the less hesitant you will be. There are many online typing lessons available. Use a search engine to find a lesson that suits you.

Speed and accuracy can be improved if you are in a comfortable position. With less discomfort and fatigue you will be more alert and have better concentration and comprehension.

If you need to enter a lot of numerical data, activate the **NumLock** function on your keyboard by pressing the **NumLock** key. You will then be able to use the numerical keypad to the right of your keyboard.

Keyboard shortcuts

Another way to streamline your typing is to use the shortcuts on your keyboard. A shortcut is a combination of keys that allows you to travel more efficiently around your system and the application you are using. For example, if you press **Alt+Tab**, you can switch between two open programs on your computer. This saves time locating the other program. Other shortcuts allow you to open your **Start** menu, quit a program, operate a program and cut, copy and paste content.

The following table shows some useful Windows system shortcut key combinations and what they do.

F1	Help
Ctrl+Esc	Open Start menu
Alt+Tab	Switch between open programs
Alt+F4	Quit program
Ctrl+C	Copy
Ctrl+X	Cut
Ctrl+V	Paste
Ctrl+Z	Undo
Ctrl+B	Bold
Ctrl+U	Underline
Ctrl+I	Italic
Shift+Delete	Deletes an item immediately without placing it in the recycle bin

Mouse

The mouse controls the cursor on your computer. It can be customised to suit your individual needs. This will improve the way you move around the screen.

If you customise the mouse settings, you will be able to choose a right-handed or left-handed mouse button configuration, adjust the double-click speed and turn on the **ClickLock** feature, which allows you to highlight or drag without holding down the mouse button.

Other mouse options allow you to change the pointer scheme (how it looks), adjust the pointer speed and adjust the acceleration rate. You can also show pointer trails, hide the pointer while typing and show the location of the pointer.

As with so many other features of your computer, just because you can do something does not mean that you necessarily should.

Change your mouse properties

The following steps will help you get to the **Mouse Properties** window.

1. From **Start** select **Control Panel**.
2. From the **Control Panel**, if the settings are in categories select **Hardware and sound**. If all settings are listed, go to Step 3.
3. Select **Mouse**.

You should now see the following **Mouse Properties** window.

Practice task 8

1. Practise using the following shortcuts on your computer:
   - Switch between open programs.
   - Bold and underline some content.
   - Cut, copy and paste content within a program.
2. Find the **Mouse Properties** window on your computer and change the properties of your mouse. Consider the following options.
   - In **Pointers**, adjust the scheme of your cursor. You may choose a larger cursor or one that is totally different to the one you have; for example, you can change it to a hand or a dinosaur.
   - In **Pointer Options**, display a pointer trail. Decide whether you would like the trail to be long or short.
   - In **Buttons**, adjust your double-click speed.

Summary

1. Organisations need to identify, open and generate files and records according to task and organisational requirements.
2. Organisations need to create, update and store their files in suitable locations so that they can be easily accessed and maintained.
3. A business document is formatted to improve the presentation and appearance of information.
4. Before designing a document, you need to think about who you are communicating with and what information, or message, you are trying to convey.
5. Designing and formatting a document is about organising the structure and style to maximise the readability of the information.
6. A range of software functions can be used to design, format, edit, merge, check and improve the presentation of a document.
7. Input devices allow you to put information into a computer. The mouse controls the cursor on your computer. To use a keyboard with speed and accuracy, you need to be confident and streamline your actions.

Learning checkpoint 2
Design the document

This learning checkpoint allows you to review your skills and knowledge in designing the document.

Part A

1. Create a simple business document using Microsoft Word. Format the document and write down the specifications of the formatting you choose.
   Use the following formatting functions:
   - A style with a font and font size selection
   - Bold, italic and underline functions
   - Alignment function (at least once)
   - Numbering or bullets
   - Decrease or increase indent function
   - Border (outside)
   - Highlighting or font colour
   - Insertion of a graphic
2. 'In today's business environment, the manager who has the relevant data first often wins, either by making the decision ahead of the competition, or by making a better, more informed decision.'

   Describe how creating and updating records and files allows management to make better decisions.

3. Imagine that you are training someone to use either a keyboard or a mouse. Design a cheat sheet or tips page with at least five points for your student to learn. Explain how you are going to teach each point.

Part B

1. Design a document for either your organisation or an organisation that you are familiar with. If you are in the workplace, talk to a manager and decide on a business document that needs to be designed. If you are learning in a classroom or at home, design an absenteeism report for Happy Kids Primary School. The daily report should show which children are absent on a particular day, how many days they have been absent, antd whether there has been any information from the parents about why the child is absent. It might also show which classes the children are in.
   a) Choose an appropriate software application to design your document and give a reason for your choice.
   b) Make sure that the document includes:
      - appropriate design principles
      - a range of formatting functions.
   c) Describe how you used the principles and functions.
   d) As you work, use the shortcuts on your keyboard and customise your mouse to whatever suits you best. Describe how you did this.
   e) Identify any other files or records you had to access in order to create this document. Explain where they are stored and how you accessed them.
   f) Give the digital copy of your document a name. Explain how this meets the requirements of your organisation.

2. Design a business document using the following content.

    Dealing with stress

    Take regular breaks

    Exercise

    Find someone to talk to

    Reduce your tea and coffee intake

    Every 20 minutes rest your eyes. Take a walk around the office. Try to go outside at lunchtime. What are other ways to de-stress?

    If you are sitting for long periods or working at your computer for extended periods, stretch your fingers, arms, shoulders, neck and legs. Have a copy of exercises pinned up near your workstation.

    Talking to someone about how you feel helps you let off steam. A good laugh also helps you to calm down and puts the reasons for your stress into perspective.

    Tea and coffee are stimulants. Too much caffeine keeps you awake and hyperactive.

a) Use Microsoft Word to design your document.

b) The design of the document is up to you, but try to include a graphic. You must also include:
    - appropriate design principles
    - styles
    - table formatting
    - headers and footers.

c) Describe how you used design principles and the functions listed.

d) As you work, use the shortcuts on your keyboard and customise your mouse to whatever suits you best.

e) Identify any other files or records you had to access in order to create this document; for example, files from your place of study or at home. Explain where they are stored and how you accessed them.

f) Give the digital copy of your document a name. Explain how this meets the requirements of your place of study or home.

Part C

Access and download employee-inquiry-sheet.docx either by scanning the QR code provided or at: http://chilp.it/5c045a8.

Print off a copy of the document as it is, before you make any changes. Now, use the document theme features to create a new document. Use the text from the form but apply either a predefined or a custom document theme to change the appearance of the entire document. Change the colours, fonts and any line and fill effects. Once you are happy your new form has a professional and modern look, save it and print it.

Once you have done this, go back to your original form and go through this process again but using a different theme. Also add some graphics. Save and print this new form.

Then submit both versions of the form (together with the original) as part of your assessment.

Topic 3
Produce the document

Producing a business document is a process. It involves a time line and a number of related tasks. It also involves a period of checking to make sure that the document has no errors and meets the requirements of your organisation.

Once a document has been produced, it should be appropriately named and stored. This might be as a hard copy, a digital file or possibly as both. Either way, it must be in the right location so that others in the organisation can find it quickly and easily if required.

If you run into a problem while you are producing the document, you have a number of avenues for help. Use the help feature of your software or go to the software developer's website for information. You could also refer to the user manual or a training booklet.

In this topic you will learn how to:

3A Complete document production within designated time lines

3B Check documents for style and layout

3C Store and save documents

3D Overcome basic difficulties with document design and production

3A Complete document production within designated time lines

Whenever you have to produce a document, you need to plan a time line, which sets the schedule for a task or project. The time gives details of each task that needs to be accomplished to achieve that goal. It also describes who will complete each task and how long they have to do this.

Time lines are often set by other people in your organisation. To successfully meet these requirements, you need to define the scope of the document, or how much of its subject should be covered. To do this successfully, you need to clarify who the audience is and exactly what the document is meant to say. Then, you need to identify the tasks involved in producing the document. Next, work out how long it will take you to complete each task. By completing each task in the time you have allocated, you should be able to produce the business document on time.

Document production tasks may include:

- clarifying the document's scope and audience
- researching the proposed content of the document
- accessing relevant information to include in the document
- writing the document
- formatting the document
- checking the document
- obtaining feedback on the document.

Realistic time lines

Once you have completed your document, think about whether the time line was realistic and achievable. If it was not realistic, make a note of this for future reference so you can allow more time to prepare it. If the time line was imposed on you by your organisation, and was without any flexibility, take the time to talk to your manager or supervisor about this and suggest that the time line be revised in the future.

Practice task 9

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

Case study

Rada works as an administrative assistant. One of her duties is to produce documents for her manager. Rada has just been asked to produce the organisation's newsletter. This is usually delivered in hard copy to internal and external clients.

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

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

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

1. Explain why the production of the newsletter needed a time line.

continued ...

... continued

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

3. When there are a number of people involved in the production of a document, what kinds of things can go wrong?

3B Check documents for style and layout

All organisations have processes and specifications to ensure their documents meet a certain standard of layout and style. Even though you may follow these requirements, you may still make mistakes. Because of this, all documents must still be checked for errors. As well as checking the style and layout of the document, you should also check spelling, grammar and punctuation. If you work with business documents you may often have to proofread and edit documents before they are printed, published or uploaded to the web.

Edit and proofread

When you edit a document, you modify and refine it to make sure that it meets with your organisational requirements. When you proofread a document, you identify and correct any errors in spelling, grammar and punctuation.

A checklist is often used to help people systematically go through the points that need to be considered before a document's final draft. Many organisations have their own checklists for proofreading and editing documents. Using a checklist will help you edit and proofread quickly and efficiently. If your organisation does not have a checklist, perhaps you could develop one for it to use.

Here are some things to consider when editing and proofreading and how to address them.

Spelling

Never rely on the spellcheck function on your computer. It only identifies spelling errors, not incorrect use of words. Words may also be spelled in different ways; for example, American/Australian spelling for words such as organize/organise. Check the in-house style manual and ensure that you have selected Australian English as the language of your document (unless your organisation has a different policy).

Grammar and punctuation

Grammar and punctuation suggestions made by software applications are not always accurate. Check them yourself before adopting the suggestion.

Style

Styles should be consistent. Make sure headers and footers are correct and spacing is consistent throughout; for example, 10.30 am is always written in the same way. Check the in-house style manual.

Also consider using styles in your document to ensure and enforce consistency.

Accuracy of numerical and statistical data

Match your document with the original figures you were given. It is very easy to make a mistake when entering a lot of numerical data into a document.

Edit and proofread tools and symbols

If you proofread using Word, you can use the **Track Changes** setting as discussed. Select the **Review** tab and **Track Changes.** Once you have activated this setting, your proofreading and editing changes will be highlighted. To permanently remove any changes, you must accept or reject them.

Editing and proofing symbols are used on hard copies of documents to indicate where changes should be made. They are similar to shorthand, as they are much quicker and take up less space on the page than writing instructions in longhand.

The *Style manual for authors, editors and printers* (John Wiley & Sons) is the standard text used by the Australian Government. It provides an extensive discussion of editing and proofreading symbols and their use, as well as other editing and formatting issues. Some organisations also have their own in-house style manuals or guidelines.

You should be familiar with both common and non-standard editing symbols so you can easily interpret the changes suggested by others.

Instruction	Mark in the text	Symbol
Insert	Place a 'caret' in the text where you want to insert something: Insert here	
Insert space	Place the mark where you want the space to be: Maintain accurate records of all transactions	#
Insert hyphen	Place the mark where you want the hyphen to be: Don't throw away once used paper.	
Close up—delete space between characters	Draw half circles to link the characters: sen tence	
Leave as printed—'stet' means to ignore the edit and leave it as it is	Draw a dotted line under the characters you have deleted: ~~The meeting is scheduled for~~	stet
Wrong font—replace by letter of correct font	Circle the character to be altered: Cooperation is very important	w/f
Change to capital letters	Draw three lines under the characters to be altered: The appointment is for mrs roberts.	caps
Change to lower case	Draw a line through the characters to be altered: Take regular BReaks from your work.	l.c
Spell out abbreviation in full	Circle the abbreviation: It is a good eg of best practice.	spell out
Transpose	Draw a line to where the letters or words should be: Put paper here that is used only on one side.	trs

Practice task 10

This text is about digital cameras. Check for errors in spelling, grammar and punctuation to make it more readable. Then, rewrite the whole document with your corrections. Remember that spelling should be Australian, not American.

Digital Cameras

Digtal camera use an electronic sensor to tranform images (or vidoe) into electronic daata. Modern digital cameras are typically multifunctional and the same devise can take photorphs , vidoe and/or soundd.

In 2005 digital cameras was starting to pushe traditionl film cameras out of many markets. Shrinking device sizes have recently allowed miniaturized digitaal cameras to be included in multifunctional devices, such as ceel phones and persoonal digatal aids.

Video cameras

Proffessional video cameras such as those used in televiiosn and movie production, These typically have multiple image sensors (one per color) to enhance resoluution and color gamut. Professional video cameras usually do not have a built-in VCR or micropone.

Amature vido camers These are a combination of camera and VCR to create an all-in-one production unit. They generally include a microphone to record sound, and feature a small screen to watch video during filming and playback.

Stille cameras

Digtal stilel camers are characterized generally by they use of flash memory and USB or FireWire for storage and transfer. Most had a rear screen for reviewing PHOTOGRAPHS. They are rated in megapixels that is, the product of their maximumm reslution dimensions.

3C Store and save documents

Information is a valuable asset to any organisation. How information is saved and stored, as well as how it is protected, is central to its management.

Information contained in documents within an organisation is usually saved and stored on a computer that is connected to a server, allowing access to multiple users. A server is a computer that delivers information and software to other computers linked by a network.

To enable everyone to log on to a server, the systems administrator issues each user with a user name. Each user must then create their own password. A username and password give access to the information needed to complete workplace tasks. Different users will have access to different information.

Data needs to be safeguarded against accidental or deliberate damage. Data loss is usually caused by either human error or system failure. Many organisations use a data cartridge or other device to back up the information on the server at the end of the day. This backup device can then be taken off-site for safety.

Data storage

A data cartridge is a small magnetic tape that can hold a large amount of digital information. Information from an entire server can be saved onto a data cartridge and stored in a safe location. If any damage to the server (or the premises) occurs, a complete information backup is available.

A server is made up of lots of files and folders. Organising this information helps users find what they want, when they want it. If you are saving information onto a server, make sure you know where to put it. Find out what your organisation's policy is regarding information retention and deletion.

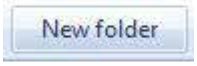
Electronic files and folders should be periodically deleted, to ensure the most efficient use of server space. Always ask for permission before you delete a file.

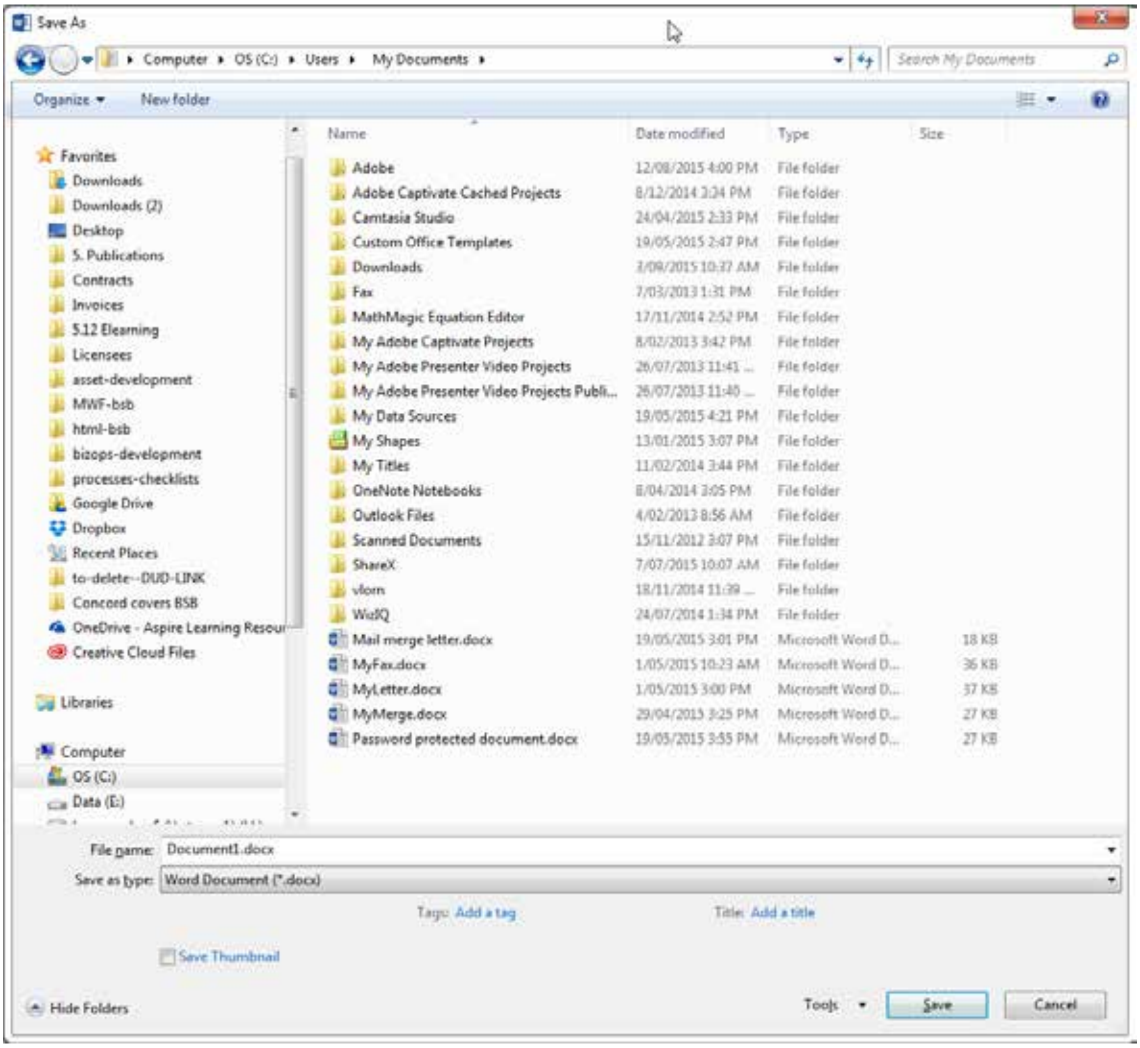
Save a new Word document

When saving a document using Microsoft Office 2013 applications, there are different options compared to what was available in previous versions. When using Word, follow these steps to correctly save your document to avoid loss of data:

Click options in the **Save As** dialogue box to save a file to a file name, format and location that you specify. If you are saving a file that has not been saved before, the **Save As** dialogue box appears automatically when you click **Save**.

The following are the buttons and other options in the **Save As** dialogue box.

- **Save in**: In the list, click a location where you want to save a file. Use the **Save in** list to move up one or more levels in the folder structure.
- **Previous folder**:  As you move through the folder structure in the **Files** list, this button allows you to go back to the previous folder that you viewed.
- **Up one level**: Click the folder title to the left in the current folder structure to access the folder up one level.
- **Delete**: Press the delete button on your keyboard to delete the selected file or folder.
- **Create new folder**:  Click this button to create a new folder within the current folder.
- **Views**:  Click the arrow next to this button to display file and folder view options.
- **File name**: Type or select a file name for the file that you are saving.
- **Save as type**: In the list, click the file format in which you want to save the file. Most 2013 Microsoft Office system programs can save files in more than one format, so you may need to select the format that you want.
- **Page title**: When you save a file as a web page (under **Web Page**), **Page title** displays the title of the web page.
- **Change title**: When you save a file as a web page (under **Web Page**), click **Change title** to display the **Set Page Title** dialogue box, where you can create or change the title of the web page.
- **Tools**: Click **Tools** to display a list of tasks that you can perform. The tools that are available vary depending on the program you are using.
- **Save**: After you determine the location, file name and format of the file that you are saving, click **Save** to save the file.



- **Cancel**: To go back to the file without saving it, click **Cancel**.

Folder structures

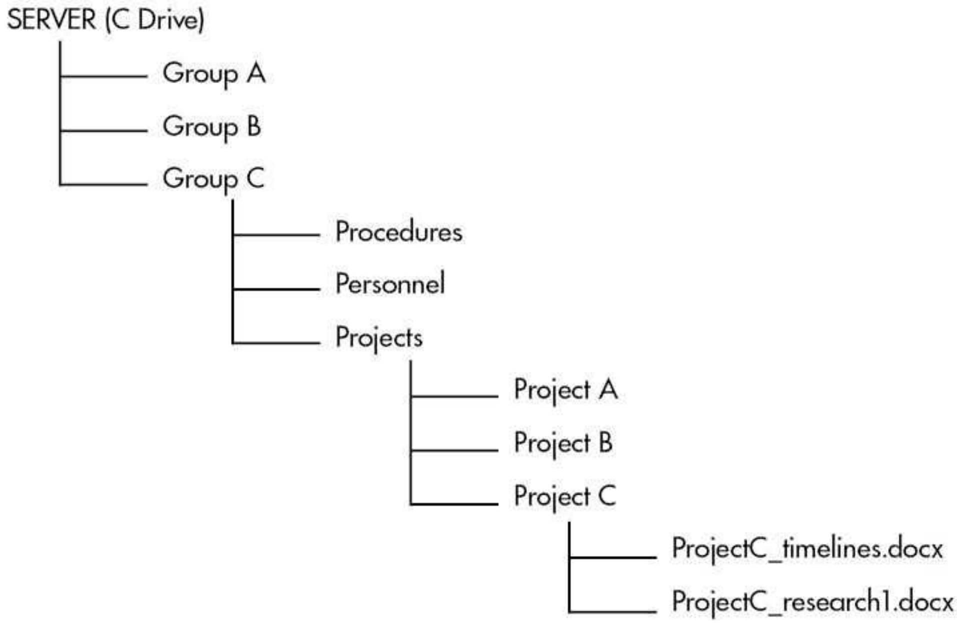
Most organisations have folder structures. This allows staff to set up folders quickly and easily. Many organisations also have shared directories. These are folders that have been placed on a network for certain groups of people to access. By using shared directories and naming standards, you can avoid losing or misfiling electronic documents. Work is less likely to be duplicated and information can easily be exchanged. Using a shared directory also means that documents on the same or related subject are located together. This helps when you need to find or retrieve documents.

If your organisation has a shared directory, you need to decide whether a document should be placed in the directory or stay on your own hard drive. This is because some documents are for your use only and others need to be shared.

To set up a shared directory, you have to find the shared network drive. Then go to the folder level. This is the first place to organise the directory. Folders have a tree-like structure that branches from a parent directory to sub-folders in a hierarchical structure.

Example: directory hierarchy

Consider this example of a directory hierarchy.



In this structure the server has three folders for three separate workgroups: Group A, Group B and Group C. Group C has three major folders: Procedures, Personnel and Projects. The Projects Folder has three folders: Project A, Project B and Project C. The Project C folder has two documents: ProjectC_timelines.docx and ProjectC_research1.docx. The file path for retrieving a document starts at the server and ends when the correct document is located. For example, to reach the ProjectC_timelines.doc the file path is: C:\GroupC\Projects\ProjectC\ProjectC_timelines.docx.

Digital storage

Paper documents can become damaged, yellowed and brittle. In addition, unless you are very careful, important documents can easily be torn, misfiled or accidentally thrown away. Storing a great many documents can also be expensive and some organisations prefer to store information digitally.

Digital storage saves paper and space. If the documents form part of a database, it also allows you to find specific information quite quickly. This is much easier than searching through the hard copies of the files. Databases also provide management with powerful reporting tools. For example, statistical information can be gathered from a database to produce a detailed report.

Hard-copy storage

It is common for documents stored digitally to also be stored in a hard-copy version. This is a safeguard against a catastrophic computer system failure. Hard-copy storage requires physical space. It also requires a filing system that uses consistent, simple and meaningful names similar to digital storage.

Hard-copy documents need to be kept up to date, and invalid documents need to be destroyed. Managing hard-copy documents properly is important, as storage space is valuable. Retention schedules are used to determine which documents need to be kept and for how long. Documents without permanent value may be scheduled for eventual destruction.

Retention schedules can help save space because only a limited number of records have long-term value. The development and implementation of a retention schedule also saves money, as it means that only records of enduring value will be permanently retained. Some documents need to be retained because of legal reasons; for example, taxation details need to be retained for at least five years.

Example: retention schedule

The following is a retention schedule.

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

The manual handling of incoming and outgoing correspondence requires a high level of organisation. Staff should be made aware of correspondence meant for them and outgoing correspondence needs to be sent on time. Most organisations have a distribution process involving opening, date stamping and filing incoming correspondence. A collection point for outgoing correspondence should be established to enable all mail to be collected and posted on time.

The storing and filing of incoming and outgoing faxes also requires a high level of organisation. Storage and filing procedures will vary between different organisations. Increasingly correspondence is now sent electronically by scanners and email. Check what the procedures are within your organisation. It may be that fax copies are filed by date order in a dedicated folder and are kept for a specific period of time.

Practice task 11

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

Case study

Sean works as an office administrator in a large organisation. His duties include filing copies of information and backing up the server at the end of the day. His organisation uses a shared directory.

At the end of a busy day, Sean had to file a number of folders in different locations. He remembered some of the locations, but had to guess the correct location for a couple of reports. After this, he was running late and decided not to back up the server.

The next morning, the reports Sean had filed were needed for an important board meeting. However, during the night a virus had infected the server, destroying all of the information.

1. Sean did not file some of the folders in the correct place. What might be the consequence of this?

2. Sean did not back up information from the server. What were the consequences?

3. Explain why organisations need procedures for storing and securing information.

4. List four advantages of using a shared directory.

3D Overcome basic difficulties with document design and production

Nothing in life is trouble free. You will often experience difficulties when designing or producing business documents. The business technology you are using might fail or the business software might crash. Whatever the problem, it helps to have a plan for dealing with the unexpected. Organisations deal with difficulties in a number of different ways. They might have manuals or training notes. Some may even have a helpdesk set up to aid employees.

Use online help features

If you are working in a Microsoft Office 2013 application you can use the online help feature.

The way you navigate the Help window is much the same way that you navigate the web in a web browser, such as Windows Internet Explorer. However, the Help window has additional features that a web browser lacks.

You can find help for Microsoft Office programs in more than one place. Help is installed on your computer when an Office program is installed and you can get additional help content from Microsoft Office Online. You can specify where you want to search for Help, and you can restrict the scope of your search to online or offline or to a specific category within a program.

To choose between offline and online topics, follow these steps.

Offline help	Online help
In the main window of your Microsoft Office program, open Help. You can access Help by using a keyboard shortcut: press F1. If you are using Access, Excel, PowerPoint or Word, click Microsoft Office 'program name' Help , where 'program name' is the name of the program you are in; for example, Microsoft Office Word Help. If you are using InfoPath, Outlook, OneNote, Project, Publisher, SharePoint Designer, Visio or Clip Organizer, click on the Help menu, then click Microsoft 'program name' Help, where 'program name' is the name of the program you are in; for example, Microsoft Office InfoPath Help.	On the **Connection Status** menu, which is located in the top left corner next to 'Word Help' of the Help window, click either **Word Help from Office.com** or **Word Help from your computer.** Now whenever you open a Help window from any Microsoft Office program, the Help window displays content from the source you chose. Your system administrator can disable the ability of the Help window to go online. If this happens, the Show content from Office Online option is not displayed. For more information, contact your system administrator.

Read manuals

Most equipment and software comes with a user manual. These describe the features and provide step-by-step instructions for use. Manuals include information about functions, maintenance, use, WHS issues related to the equipment or software, and troubleshooting tips.

Manuals can come printed (as a brochure, book or booklet) or in digital format; for example, online.

There are many websites that have information about Microsoft Office applications. These usually contain frequently asked questions (FAQs) and give solutions to common problems. You can also download updates, tools and any fixes that Microsoft has developed for its software problems.

You might find the following websites helpful.

Microsoft Office

http://support.microsoft.com

This is Microsoft's main site for finding help with Microsoft Office 2013 programs. You can ask questions online and download files including service packs, drivers and patches. You can also access the Microsoft Knowledge Base. This is a good source of help for all problems related to using Microsoft Office 2013.

Microsoft Office Applications

http://office.microsoft.com

This site provides resources for all Office applications. It has news, announcements and useful files for you to download.

Read training notes

There are many ways to learn about computer functions and software packages. You can go to a training course to learn a particular computer function. Some suppliers also provide instructions on how to use their equipment.

You may have received some training when you started your job, but it should not stop there. It is important to keep up to date with technology. Try to locate the courses in your area that offer software training. These courses usually provide a comprehensive set of notes that are worth keeping for future reference.

Tips for overcoming difficulties:

- Access printed manuals and training booklets in your workplace.
- Find websites that offer advice on software functionality.
- Ask colleagues for help and advice.

Practice task 12

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

Case study

Audrey is a personal assistant to the manager of a large organisation. One of her duties is to produce business documents using a variety of software applications. While producing documents Audrey often needs to use the Microsoft Office Help to answer questions about software functionality. If she is puzzled by anything on the screen, she presses F1 and types in her query.

If Audrey experiences software function problems that cannot be solved using the Help, she uses Microsoft's support website to find solutions. There is also a printed manual available in her workplace and she has copied the pages that she uses most frequently, keeping them in a Help folder on her desk.

1. Audrey sometimes has a software functionality problem. Where does she go for help?

2. When Audrey experiences a problem on the screen, what might she do other than use Microsoft Help or Microsoft Support websites?

Summary

1. A time line sets the schedule for a task or project and gives details of each task that needs to be accomplished to achieve that goal. They are often set by other people in your organisation and to meet these requirements you need to define the scope of the document and know who your audience is.
2. All organisations have processes and specifications to ensure that their documents meet a certain standard of layout and style. Spelling, grammar and punctuation need to be checked carefully when proofreading.
3. Data needs to be safeguarded against accidental or deliberate damage by appropriate storage of documents and consistent saving and naming methods.
4. Hard-copy versions of documents need to be kept up to date, and invalid documents periodically destroyed.
5. Online and paper-based manuals and training booklets help overcome difficulties.

Learning checkpoint 3
Produce the document

This learning checkpoint allows you to review your skills and knowledge in producing the document.

Part A

You have been asked to produce a business document by a certain date. To successfully meet this requirement, you need to define the scope of the document.

1. What does 'producing a business document by a certain date and define the scope of the document' mean?

2. How would you develop a time line to produce this document?

Part B

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

Case study

Office Temp is an organisation that supplies temporary office staff. It has four work groups, each with two major areas of operations: Temporary Staff CVs and Client Information. Multiple files need to be stored in folders representing each area of operation. All staff CV files must start with CV and all client information files must start with CI. The work groups have a shared directory on the C drive.

1. Design a hierarchical folder structure to suit Office Temp. Refer to the example in this topic if you need help. Make sure you choose folder names that are consistent, simple and meaningful.

2. Use the information on editing marks in this topic to translate the following edit marks. Reproduce the following text with all edits corrected.

italics **Identifying long-term needs**

⁁- The long term plan for the organisation is to desktop all products in-house. IN order to establish an in-house desktop publishing department, existing staff will need training in new software programs. The cost of upgrading the existing computer software and the amount of staff time required to retin also need to be factored into the decision. l.c
⁁a

A specialised publishing team will be created to ~~that would~~ be responsible for maintaining the desktopping requirements, for example flyers, marketing material, workbooks, specials, etc.

italics **Identifying short-term needs**

new para

The first phase is to identify the skills, ability and knowledge of the existing staff. Each staff is to complete a survey describing their level of experience with desktopping software and the application with which they are familiar.Those staff in need of training will be allocated days on which to attend training away from the organisation. ~~A list of appropriate short courses is attached.~~ stet close gap

The second phase is to establish an in-house style for all publications. Styles and templates will be established as models for all staff to follow.

italics **Determining appropriate technologies**

u.c current software was analysed for its appropriateness, efficiency and compatibility with the organisation's printers as well as printers from other organisations to which material was often sent for printing. It was found that the software failed to meet the criteria.

Another problem experienced with this software is the fact that is isn't flexible, and fonts and specific formats often dropped out. This ~~was~~ has been extremely inconvenient and wasted a lot of time. spell out
⁁s

\# As well files cannot be read by other software programs, and the organisation has been required to purchase a file converter. This was an additional cost that was not expected or allocated into finances for implementation of this porgram. trs

Part C

1. Produce a business document, such as a newsletter or a report. The topic is up to you, but you must discuss it with your trainer before you start. To develop the document, make sure that you do the following:

- Scope the document to decide exactly what information it will contain.
- Identify every task that must be done to produce the document.
- Prepare a time line and allocate some time for every task.
- Develop the document.
- Proofread and edit the document for spelling, grammar and punctuation.

2. Store the document in an appropriate way. Explain how you have done this.

3. Describe any difficulties you had when producing this document and explain how they were overcome.

Topic 4
Finalise the document

Once you have selected and prepared your resources, and then designed and produced your document, you will finalise it. This entails a final proofreading, making any modifications necessary, naming and storing the document, exiting the application correctly and finally printing and presenting the document.

These processes must take place in a logical sequence to avoid missing any errors, or losing or damaging any data, and to make sure you produce a professional document according to the requirements of your organisation.

In this topic you will learn how to:

4A Proofread the document prior to final output

4B Make modifications

4C Name and store the document and exit the application

4D Print and present the document

4A Proofread the document prior to final output

In the previous topic, you learnt about the importance of checking a document for errors in its style and layout as well as spelling, grammar and punctuation. You looked at editing and proofreading tools and symbols, and explored ways to ensure the document is consistent with organisational requirements. Proofreading means ensuring your final text is free of mistakes. Using the spellchecking function alone is not sufficient; it does not pick up the incorrect use of words, and cannot identify situations where you have typed a word that is pronounced the same way as the word you wanted but means something different (a homonym).

Now you will look at some further techniques for developing your proofreading skills to enable you to check your document for readability, accuracy and consistency in language, style and layout prior to the final output, which is the completed version of your final document, either printed or electronic.

Tips and tricks for proofreading:

- Print a copy of the document; it is easier to detect errors on a page than on screen.
- Read it slowly; one word at a time, covering the later words so that you do not look ahead or look for meaning.
- Have someone else read it.
- Read it out loud and silently.
- Read it backwards, in segments, so aspects other than meaning, such as spelling errors and layout, stand out more.
- Use the spelling and grammar checking functions at first proofing – but don't depend on them entirely.
- Double-check any numbers.
- Read it upside down to focus on typography.
- Allow time between completing the final copy and proofreading; then look at it with fresh eyes.
- Proofread when you're most alert.
- Don't try to proofread all types of mistakes at once. During each read-through, focus on different aspects.
- Avoid distractions.
- Watch out for homonyms. These are words that share the same spelling or pronunciation but have different meanings.
- Watch out for contractions and apostrophes.
- Make a note of your most common errors so you can pick them up faster next time, possibly by using the find and replace function.

Types of proofreading

There are three types of proofreading as outlined here.

Comparison
A comparison proofread may not be applicable to every task. It applies to tasks where you have an original document you are copying from. This could be your own handwritten notes or printed notes with changes highlighted on them. A comparison proofread requires a word-for-word, character-for-character comparison of the new document and the old document. This is to ensure that the exact same words and punctuation are in both documents.

Content
A content proofread focuses on the new document. The purpose is to look for correct sentence structure, logic, spelling, punctuation, consistency and factuality. The purpose of the content read is to make sure the document is correct and reads well; that is, readability. Readability refers to how well the document flows; for example, whether there are enough new paragraphs to separate different parts of the content. A good trick to check a document's readability is to read it out loud to yourself or to someone else. Take time to read through it several times. Another strategy is to have someone else read it and give you feedback. Another person will be in a better position to evaluate whether your sentences make sense or not.

Format
A format proofread is the final proofreading. You are looking for a correct and consistent format in the document. There are certain formatting conventions that are often followed when preparing business documents such as a business letter. A good starting point for a format proofread is to scan the edges of the document and look for anything that is out of alignment. Then look at the overall page, and check whether it looks balanced. For example, is the space between paragraphs consistent? Are all paragraphs aligned to both the left and right margins? Check page numbers, headers and footers, if applicable. Allow yourself a reasonable amount of time to work through each of these proofreading stages in order to produce the most professional outcome. When you are proofreading a business document you might like to consider the following tips to assist you and make it easier when proofreading documents at future times.

Proofreading tips

Some useful tips for proofreading:

- Use a bright coloured highlighter so that your corrections stand out.
- As well as marking the errors, mark every page that has an error on it so you can skip over the pages that don't have any. Use either the upper or lower right-hand corner so you can flick through the document quickly.
- Point with your finger to read one word at a time.
- Read something else between proofreading. This helps to clear your head of what you anticipate reading and allows you to read the actual text.
- Check that numbers match their references in the text and are sequential (in order).
- Have a good dictionary and a thesaurus at hand.

Practice task 13

Proofread and edit this business document. You need to consider its readability, accuracy and consistency of language, style and layout. Reproduce the document, proofread it using appropriate techniques, and print it. Make a note of the changes you have made as this may help when proofreading and editing documents in the future.

Using software functions

You are now going to learn how to prepare an electric presentation. You will need to have excess to a computer and Microsoft PowerPoint. The operating system used in this unit is Microsoft Vista and the software is PowerPoint 2013. To design your present you need to develop an understanding of the software functions and features of PowerPoint (ie what the program allows you to do.) This will enable you to prepare a present that has a consistent style and a visual impact.

In this part of the unit you will:

- create a slide show
- apply a design template
- add content
- right or draw on slides
- apply a style
- create handouts and speaker notes.

PowerPoint uses slides to build an electronic presentation. A slide is a single frame in a presentation and a presentation comprises a group of slides. Before you start to design your presentation, it will be helpful to become familiar with the names of sum of the PowerPoint functions. Look at the functions and descriptions in the following table.

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Function	Description
Placeholders	Boxes with dotted lines that appear when you create a knew slide.
Slide Master	Allows you to change the style of text and have the style reflected throughout the hole presentation
Notes Master	Allows you to create notes when working on your presentation.
Importing other applications	Allows you to import information from other applications such as Word or Excel, and add them too your presentation.
Handout Master	Allows you to create handouts to go with you're presentation.
Colour schemes	Is a selection of background colours that you can apply too your presentation.
Templates	Templates contain colour schemes and text formatting to design a presentation with a particular look.

Planning your presentation

As previously discussed, you need to plan your presentation before you begin. This means working out:

- what the presentation is about (the purpose)
- how the presentation is for (the audience)
- how you are going to present the information? (the method).

Then you need to prepare the content of your presentation. The best way to do this is to create a storyboard to help you map out the information you are going too present.

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4B Make modifications

Once the document has been proofread and errors or inconsistencies identified, the document will need to be modified (or edited) accordingly. The modifications you make will depend on what computer software you are using, what sort of business document it is and what kind of modification.

The way you make modifications to a business document will depend on the software you are using. Commercial accounting packages such as Quicken and Mind Your Own Business (MYOB) have their own customised way of editing. If you are unfamiliar with this part of the package consult the manual, the online help or a work colleague.

You have already learnt about the edit feature of tracking changes in Microsoft Office 2013, as well as making design and layout modifications to text and tables. Another common way of making modifications to an existing document is to scan it and then modify it.

Types of modifications
• Spelling and grammar • Style • Layout • Theme • Graphics • Table layout • Table formatting • Headers and footers

Edit a scanned document

Scan your document according to the instructions for your scanner.

Before you continue, convert the file that the scanner created to TIFF, which means tagged image file format. You can use Paint or another program to convert the file.

You now have a document that you can edit. Be sure to save the new file so you don't lose your changes.

Be aware that scanning a document does not always give a perfect result. Watch for documents that use unusual typefaces (fonts), as well as for confusion between similar looking letters and numbers. The upper-case letter O and the numeral 0 can be confused, as can the number 1, lower-case l and even upper-case I.

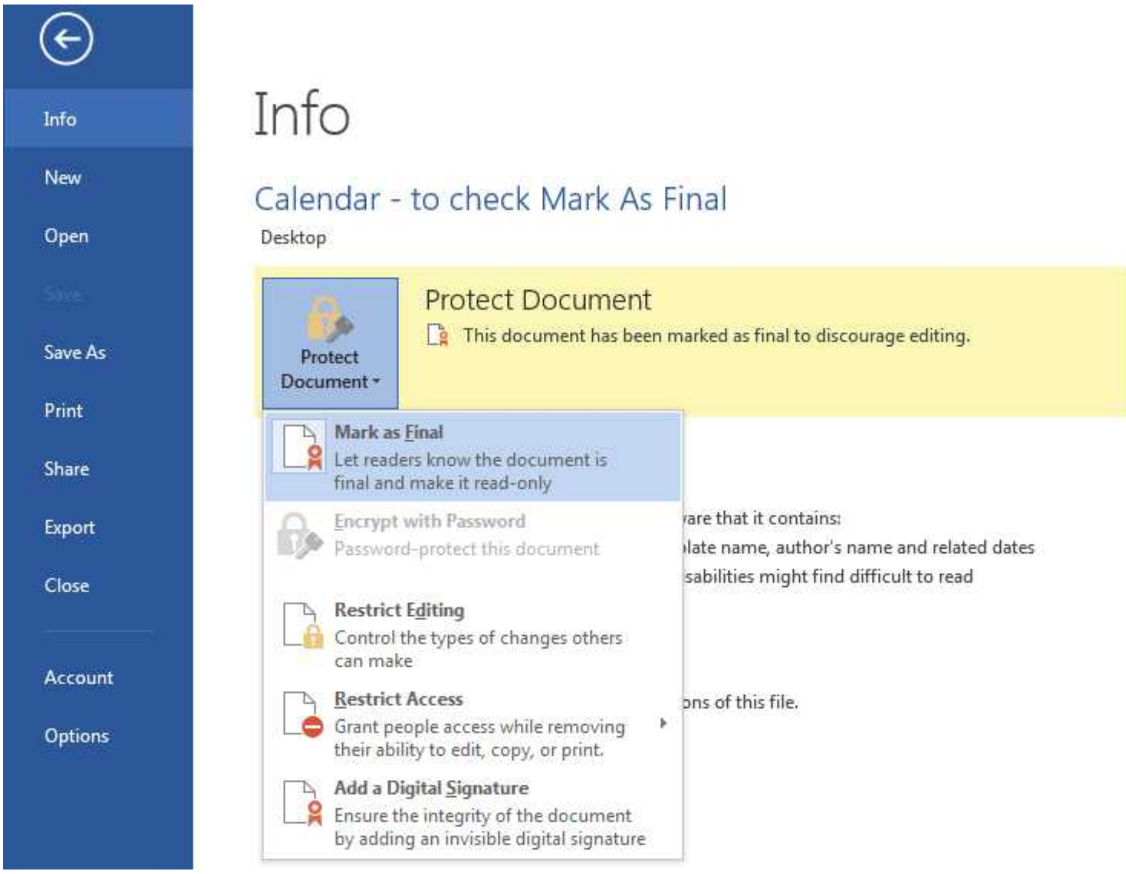
Enable editing for a document that is marked as final

You may need to modify a document that has been marked as final at a previous time, and therefore is only accessible in read-only format.

In Microsoft Office 2013 programs, documents in read-only format have a yellow MARKED AS FINAL banner at the top of the document to discourage editing. But you can override the read-only format by selecting the **Edit anyway** button.

Set the **Mark as Final** command for a document that has been finalised as follows.

1. Open the document that has been approved as final.
2. Click the **File** tab, select **Info** and then click on **Protect Document** to select **Mark as Final**.



Find and replace function

Another useful modification feature of Microsoft Office programs is the **Find and Replace** option. This is used to find and replace text, formatting, paragraph marks, page breaks and other items. You can also find and replace noun or adjective forms or verb tenses. Just be careful when using the **Find and Replace all** feature that you don't create problems such as incorrect case. It is good practice to replace one word at a time rather than replace all.

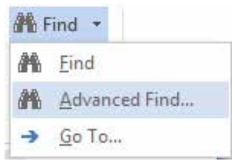
Find text

You can quickly search for every occurrence of a specific word or phrase.

1. On the **Home** tab, in the **Editing** group, click and select **Find**.
2. In the **Search Document** box, type the text that you want to search for.

All instances of the word or phrase will be highlighted in the document.

For more search options or to turn off the highlighting, in the **Home** tab click on the **Find** drop-down arrow and select **Advance Find…**



Find and replace text

You can automatically replace a word or phrase with another; for example, you can replace **Acme** with **Apex**.

The replacement text will default to using the same capitalisation as the text that it replaces. For example, if you search for AKA and replace it with Also known as, the result will be ALSO KNOWN AS. You can override this by clicking **More** and selecting **Match case** from the list of options.

1. On the **Home** tab, in the **Editing** group, click **Replace**.

2. Click the **Replace** tab.
3. In the **Find what** box, type the text that you want to search for.
4. In the **Replace with** box, type the replacement text.
5. Do one of the following:

- To find the next occurrence of the text, click **Find Next**.
- To replace an occurrence of the text, click **Replace**. After you click **Replace**, it will move to the next occurrence of the text.
- To replace all occurrences of the text, click **Replace All**.

Find and replace specific formatting

You can search for and replace or remove character formatting. For example, you can search for a specific word or phrase and change the font colour, or you can search for specific formatting such as bold and change it.

1. On the **Home** tab, in the **Editing** group, click **Replace**.

2. To search for text with specific formatting, type the text in the **Find what** box. To find formatting only, leave the box blank.
3. Click **Format**, and then select the formats that you want to find and replace.
4. Click the **Replace with** box, click **Format** and then select the replacement formats. If you also want to replace the text, type the replacement text in the **Replace with** field.
5. To find and replace each instance of the specified formatting individually, click **Find Next** and then click **Replace**. To replace all instances of the specified formatting, click **Replace All**.

Find and replace paragraph marks, page breaks and other items

You can search for and replace special characters and document elements such as tabs and manual page breaks. For example, you can find all double paragraph marks and replace them with single paragraph marks.

1. On the **Home** tab, in the **Editing** group, click on the **Find** drop-down menu.
2. Select **Advanced Find**.
3. Click **More**, then click **Special** and then click the item that you want.

Make modifications in Microsoft Excel

Obviously there are many reasons to make modifications in all of the programs you may use.

This is a common modification made when using Microsoft Excel 2013. It is used to edit the contents of a cell. This can be done either directly in the cell or in the formula bar.

1. To place the contents of a cell in editing mode, click the cell that contains the data that you want to edit, and then click anywhere in the formula bar. This positions the insertion point in the cell or formula bar. To move the insertion point to the end of the cell contents, click the cell and press F2.
2. To edit the cell contents, do any one of the following:

- To delete characters, click where you want to delete them and then press **Backspace**, or select them and then press **Delete**.
- To insert characters, click where you want to insert them, and then type the new characters.
- To replace specific characters, select them and then type the new characters.
- To turn on Overtype mode so that existing characters are replaced by new characters while you type, press **Insert**.
- Overtype mode can be turned on or off only when you are in editing mode. When Overtype mode is turned on, the character to the right of the insertion point is highlighted in the formula bar, and it will be overwritten when you type.
- To start a new line of text at a specific point in a cell, click where you want to break the line, and then press **Alt+Enter**.

3. To enter your changes, press **Enter**. Before you press **Enter**, you can cancel any changes that you made by pressing **Esc**. After you press **Enter**, you can cancel any changes that you made by clicking **Undo** on the **Quick Access Toolbar**.

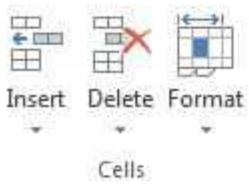
Change column width

A cell may display ##### when it contains data that has a number format and that is wider than the column width. To see all text, you must increase the width of the column.

How to change the column width:

1. Click the cell you want to change the column width for.
2. On the **Home** tab, in the **Cells** group, click **Format**.
3. Under **Cell Size**, do one of the following:

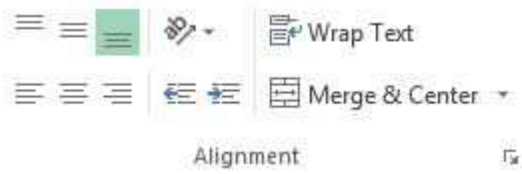
- To fit all text in the cell, click **AutoFit Column Width**.
- To specify a larger column width, click **Column Width** and then type the width that you want in the **Column width** box.



How to wrap text in a cell

You can display multiple lines of text inside a cell by wrapping the text.

1. Click the cell in which you want to wrap the text.
2. On the **Home** tab, in the **Alignment** group, click **Wrap Text**.



If the text is a single long word, the characters won't wrap; you can widen the column or decrease the font size to see all the text. If not all text is visible after you wrap the text, you may need to adjust the height of the row. On the **Home** tab, in the **Cells** group, click **Format** and then under **Cell Size** click **AutoFit Row**.

Practice task 14

If you have access to a scanner, try scanning the document in the previous practice task and then making modifications to correct it.

If you don't have access to a scanner, select a document of your choice and practise using the find and replace functions described in this section. Also try marking your document as final and then allowing it to be edited.

4C Name and store the document, and exit the application

As well as placing folders and files in the appropriate places, you also need to give them appropriate names. Naming methods should be kept consistent, simple and meaningful. Appropriate naming conventions help in the identification and retrieval of documents.

Your organisation may already have established guidelines for naming files that you should use as well as requirements for backing up data.

Windows Explorer is a file management application designed to manage files, folders and drives. This, combined with the application program you are using, enables you to manage files efficiently and logically.

Use meaningful file names

When using Microsoft programs and Windows Explorer, file names are listed alphabetically based on the first word. Therefore, this first word has to be meaningful. For example, if you have a folder of proforma documents (such as fax forms, business letters, order forms and letterheads), it would be logical to name them this way, rather than by Pro-forma fax and Pro-forma letterhead as then they would all begin with the letter ‘P’.

Alternatively, within a letter folder you may use numbers as file names. For example, if you write several letters to the one client you may name them Letter 1 Jack Smith, Letter 2 Jack Smith followed by the date. Numbering files is very common for organisations such as insurance companies, who may name the document according to a policy number.

If you are preparing documents for regular meetings, you may like to label them with the date or number of the meeting. Some people use a standard date format; for example, 20080401BoardAgenda (for a document dated 1 April 2008) or, particularly for monthly meetings, simply use the year and month; for example, 2008-04BoardAgenda. It is better to use the number rather than the name of the month, if you want the documents to appear sequentially in your list of files.

Whenever you have a series of related files, it is a good idea to use the same or similar file names for each file. Make sure that you can easily distinguish them from one another, though!

Save documents to avoid loss of data

After creating or modifying an electronic document, you need to save it to ensure that your data is not lost when you exit the software application. Data loss happens when a document is not saved correctly or frequently or when the computer program stops performing its expected function. Often the offending program may simply appear to freeze. All computer users have experienced data loss at some time, or have been unable to access data from a previously functioning computer. Data may not have been saved regularly or correctly, or it may have been accidentally erased or corrupted and made inaccessible. The most common cause of data loss is human error.

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

Try to work on one document at a time. If you need to have multiple applications open, make sure you save the documents that are no longer needed before closing the applications. This will help your computer to work more quickly and prevent data loss if the computer fails.

Other causes of data loss include virus damage, operating system or application software bugs and failed upgrades.

Exit applications safely

When exiting an application, you need to ensure that you understand the method of saving prior to exiting that is applicable to the program you are using. Always save prior to exiting and ensure that all windows that are open in the program are closed correctly prior to closing the program. Never shut down your computer until all opened applications have been closed properly.

You can exit Microsoft Office 2013 programs either by selecting the **File** tab and choosing **Exit**, or by clicking on the close button **X** at the top right-hand corner of the window.

Backup data

There are various methods of backing up (storing) your document. These are outlined here.

DVD Write drive

Data is copied onto DVD.

USB drive

Also known as a flash drive. This is a plug-and-play portable storage device that uses fast flash memory and is lightweight and portable. These are commonly used in place of a DVD. When a USB drive is plugged into a USB port, the computer's operating system recognises the device as a removable drive and assigns it a drive letter. Some USB devices have password protection or other security features.

External hard drive

A portable storage device that can be attached to a computer through a USB or FireWire connection, or wirelessly. External hard drives typically have high storage capacities and are often used to back up computers or serve as a network drive.

Cloud computing

The practice of using a network of remote servers hosted on the internet to store, manage and process data, rather than a local server or a personal computer.

Practice task 15

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

Case study

Matthew has retired from an organisation after working there as an administrative assistant for 10 years. At work, he had been responsible for two areas: Accounts and Projects. The day after he retired, somebody urgently needed a file that Matthew had created and stored. The file contained vital accounting information. It was discovered that Matthew had saved over 500 files in a variety of folders and the file could not be located. The folders had names such as Folder1 and Folder2 and the files had names such as august1.docx and march2.docx.

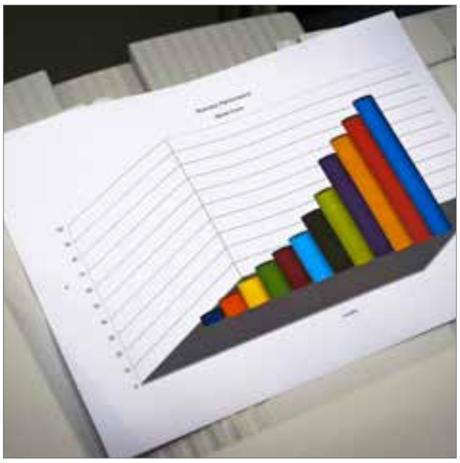
1. Describe why Matthew's folder and file naming system failed.

2. Matthew was responsible for two areas. What folder names could he have used to make sure that files were placed in the correct folder?

3. Describe the consequences of placing folders and files with unclear names on shared directories.

4. List four reasons for data loss.

4D Print and present the document



Once you have done a final proofread of your document for spelling, grammar, consistency and style, you are ready to print it. The information you print may be for your own use or for someone else in the organisation. If you are printing materials for someone else, make sure that you discuss what they need before printing, as alterations may be required.

Also be aware of organisation requirements for printing and presenting documents. An organisation may have a policy that business documents must be printed double-sided (that is, using both sides of the paper) or that certain business documents are printed with a glossy, coloured front page and remaining pages in black and white. Make yourself familiar with your organisation's requirements for printing and presentation.

If your document has been prepared using PowerPoint you can print out handouts, speaker notes, outlines or transparencies. If your document is a Publisher or Word document you will likely be printing out the completed document onto paper, card or transparencies and may also print envelopes.

Print from Microsoft Word

To print a Microsoft Word document, click **File** tab and select **Print** from the menu on the left.

You may need to use the following options in the **Print** options.

Print	
Print icon	Click here when you are ready to print, after checking that the Printer and Settings are correct.
Copies	Click the arrows to increase or decrease the number of copies that you want printed. You can also type in the number of copies you require in the box.
Printer	
Printer	Select your printer from the drop-down list.
Print to File	This option is at the bottom of the Printer drop-down menu. Select this to create a file from the document instead of routing it directly to a printer. The file is saved with print formatting, such as font selection and colour specification in a .prn file that can be printed to another printer.
Printer Properties	This link will bring up the Printer Properties dialog box.

Settings	
Print All Pages	In this drop-down menu, you can choose to print the entire document, the current page or specific pages to print. You can also choose to print only odd or even pages. If Print Markup is checked, then all the tracked changes made to the document will be printed on the right-hand side of the page. You can also choose to print other document information such as a list of styles used or the file name, author and title.
Pages	In this box enter the page range you wish to print.
Print One Sided	In the drop-down menu, select if you want to print on one side, print on two sides or manually load the printer to print on two sides.
Collated	If you collate the printing and print three copies of a document, you will print pages 1,2,3,1,2,3,1,2,3 and so on. If you choose uncollated, you will print pages 1,1,1,2,2,2,3,3,3 and so on.
Orientation	In this drop-down menu, select either portrait orientation or landscape orientation.
Paper Size	In this drop-down menu, select the paper size you will be printing on.
Margins	In this drop-down menu, you can select from a range of margin pre-sets such as normal, narrow, moderate, wide, mirrored and Office 2013 default. You can also click on Custom Margins, which will take you to the Page Setup dialog box.
Pages Per Sheet	In this drop-down menu, click the number of pages you want to appear on one printed page. You can also choose to Scale to Paper Size.
Page Setup	Click this link to launch the Page Setup dialog box for more page setup options.

Print from Microsoft Excel

If you are printing from **Excel,** you will be printing worksheets or workbooks. You may wish to preview your worksheets prior to printing to ensure the layout is satisfactory. For example, to make sure that the worksheet fits on one page. Follow these steps:

1. Click the worksheet that you want to preview before you print it.
2. Click **File** tab and select **Print** from the menu on the left.
3. The Print preview will automatically be shown on the right-hand side.
   Keyboard shortcut – You can also press **Ctrl+F2**.
4. To preview the next and previous page, scroll up or down.
5. To view page margins, click on the Show Margins button under **Settings**.
   This displays the margins in the **Print preview**. To make changes to the margins, you can drag the margins to the height and width that you want. You can also change the column widths by dragging handles at the top of print preview page.

To make page setup changes, use the drop-down menus under **Settings**. You can also click on the **Page Setup** link to launch the Page Setup dialog box and then select the options that you want on the **Page**, **Margins**, **Header/Footer**, or **Sheet** tab.

Print handouts in Microsoft PowerPoint

In PowerPoint you can print your slides as handouts for the audience. You can also choose how many slides you would like on each handout. The following method will print out an exact replica of your presentation slides.

Follow these steps:

1. Open the presentation for which you want to print handouts.
2. Select the **File** tab, then click **Print**.
3. Click on the **Full Page Slides** option. This will bring up a drop-down menu where you can select the handout option you want from the list.
   The **Handouts (3 Slides Per Page)** format in PowerPoint provides lines for the audience to take notes.
   You can choose whether you want to print handouts in colour, grayscale or black and white. Go to the **File** tab and click **Print**. The last drop-down menu lets you make this selection.
4. To specify the page orientation, click the **Portrait Orientation** drop-down menu, and then click **Landscape** or **Portrait**.
5. Click **Print**.

Printing tips

There are many devices and programs required to perform a print operation and sometimes these don't work as they should.

Before printing your document, make sure that it has been saved securely. Also make sure that the printer is properly connected and ready to receive print jobs. Replace toner according to the supplier's instructions and make sure the correct paper is used.

If you are printing onto preprinted paper, such as letterhead or certificates, make sure it is inserted the correct way so as to avoid wastage. Also remember to remove any spare preprinted sheets so that the next user doesn't waste these.

Presentation of the document

The final presentation of your document will be determined by the type, size and style of your document and the requirements applicable to your organisation or client. No matter which form of final presentation is used, the most important thing is that it is clear, accurate, a consistent style and professionally presented. Following are some of the various ways that business documents can be presented.

Electronic

- Electronic presentation using PowerPoint or any program using the display provided by a data projector
- Presentation using transparencies and an overhead projector
- Electronic presentation via email or website

Hard copy

- Printed, collated and stapled documents
- Bound book presentations
- Printed documents within a display folder
- Printed documents in a presentation wallet displaying information unique to the organisation such as logo, letterhead and organisation details
- Printed and laminated documents
- Printed reports in a ring binder or clipboard.

Practice task 16

1. Describe the appropriate methods of presentation to present reports such as projects or résumés.

2. How do you select to print only four consecutive pages in a 10-page document?

3. If you are printing a four-page word document, how do you print all four pages onto the one sheet of paper?

Summary

1. Prior to the final production of your document, you need to carefully proofread it for readability, accuracy and consistency of language, style and layout.
2. There are many useful and practical tips to assist you in proofreading.
3. Once identified, the errors or inconsistencies in the proofread document, will need to be assessed and modified as appropriate. The modifications you make will depend on the computer software you are using, the sort of business document it is and the type of modification being considered.
4. Folders and files need to be given meaningful names to make sure they can be easily accessed in the future. Naming methods need to be kept consistent. Your organisation may have existing conventions for naming and storing documents.
5. The software application needs to be exited systematically to avoid damage or loss of data. Damage or loss can occur if the document has not been correctly saved or there is a system failure. However, the main cause of data loss is human error. Backup procedures need to be followed methodically.
6. Business documents may be printed onto paper and presented in a variety of different ways such as booklets or laminated documents. Alternatively, documents may be presented electronically as an email, on a data projector screen or an overhead projector.
7. No matter which form of final presentation is used, the critical aspect is that the information in the document is clear, accurate, in a consistent style and professionally presented.

Learning checkpoint 4
Finalise the document

This learning checkpoint allows you to review your skills and knowledge in finalising the document.

Part A

Explain what methods you use within your organisation for printing and presenting business documents. Provide samples if available and appropriate.

Part B

Using a software application of your choice, prepare a document that provides a list of tips for best-practice proofreading. You can refer to websites or to other reference material. Your document should be in a format that is readable, accurate and displays consistency of language, style and layout.