

BSB 7.0

BSBTEC301

**DESIGN AND
PRODUCE
BUSINESS
DOCUMENTS**

BSBTEC301

Design and produce business documents

Release 1

Learner Guide

Aspire Version 1.1



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BSBTEC301 Design and produce business documents, Release 1

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First published October 2020

Cover design: Anne-Marie Reeves Design
Printer: Doculink Australia Pty Ltd, 1d/28 Rogers Street, Port Melbourne VIC 3207

e-ISBN 978-1-76075-825-7 (PDF version)
ISBN 978-1-76075-824-0

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Before you begin

This Learner Guide is based on the unit of competency *BSBTEC301 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	These highlight key learning points and provide realistic examples of workplace situations.
Practice Tasks	Practice Tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
Summaries	Key learning points are provided at the end of each topic.
Learning Checkpoints	There is a Learning Checkpoint at the end of each topic. Your trainer will tell you which Learning Checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.

Foundation skills

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

The following table provides definitions for each foundation skill.

Foundation skill area	Foundation skill description
Reading	<ul style="list-style-type: none"> Recognises and interprets textual information from a range of sources to determine and adhere to requirements
Writing	<ul style="list-style-type: none"> 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
Self-management	<ul style="list-style-type: none"> Recognises and follows explicit and implicit protocols and meets expectations associated with own role

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 technology and software applications	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1B Select layout and style of publication	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1C Ensure consistency of design with organisational requirements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1C Clarify format and style	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 2: Design the document	2A Identify, open and create files	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2B Design the document and ensure efficient entry of information	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2C Use a range of functions to design the document	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident

Topic	Key outcome	Rate your confidence in each section
Topic 3: Produce the document	3A Complete document production according to organisational requirements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3B Check documents for style and layout	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3C Store and save documents	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3C Overcome basic difficulties with document design and production	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 4: Finalise the document	4A Proofread the document prior to final output	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	4B Make modifications	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	4C Name and store the document, and exit the application	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	4D Present the document	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident



Topic 1 | Select and prepare resources

- 1A Select and use technology and software applications
- 1B Select layout and style of publication
- 1C Ensure consistency of design with organisational requirements
- 1D Clarify format and style

1A Select and use 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 choose the best technology and software applications 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 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 presentation and word-processing software. You would also need to use a printer to print out the speech.

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

Newsletter

A periodical publication. It may contain photographs and text. It can be used to make an announcement, such as the appointment of a new staff member; and to circulate news, such as an article on current research the organisation is doing. 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 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 have purchased. 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.

Proposal

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 needed. A proposal is always a written offer to accomplish an objective in a particular way for financial gain.

Report

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 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. Accounts statements are needed for taxation purposes. When the taxation department audits an organisation, it needs to produce all of its accounts statements.

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 page

A page on the World Wide Web (internet). It is displayed using a web browser and may contain text, illustrations, motion graphics, audio 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

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 and software.

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 included here.

Keyboard

- To use a keyboard efficiently you need to be confident and streamline your actions. Practice makes perfect. 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.
- Another way to streamline your typing is to use the shortcuts on your keyboard. 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.

Mouse

- A mouse can be used to control the cursor on your computer. It can be customised to suit your individual needs.
- 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.

Printer

- 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, quality of the print, options available and 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 to fit on one page.

Scanner

- 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 resized, 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 flatbed scanner that is connected to your computer but stands alone
 - a scanner that is incorporated into a photocopier.
- A flatbed 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.

Photocopier

- 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 often, 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 and application. 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	
Word-processing software	<ul style="list-style-type: none"> • 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. • The software can save documents in multiple output formats depending on user requirements. You could use portable document format (PDF) or a web-based format, such as hypertext mark-up language (HTML). • A commonly used word-processing software is Microsoft Word.
Spreadsheet software	<ul style="list-style-type: none"> • 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.

Business software applications	
Database software	<ul style="list-style-type: none"> • Database software organises information in such a way that you 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 last name. • A record is one complete set of fields; for example, a client's full 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.
Presentation software	<ul style="list-style-type: none"> • Presentation software is often 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: <ul style="list-style-type: none"> – 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.
Accounting software	<ul style="list-style-type: none"> • There are many commercial accounting software packages available. These enable financial records and reports to be recorded and generated electronically. Compared with 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 in the particular organisation type, such as schools or hospitals.

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. 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 needed.

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

Structure	<ul style="list-style-type: none"> • Begin with an outline. • Follow this with bullet points covering the major issues. • End with a report summary.
Format	<ul style="list-style-type: none"> • 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 properly spaced so the report is easy to read.

Meeting minutes

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

Information contained in minutes
<ul style="list-style-type: none"> • 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

Preparing minutes

Minutes of the Eighth Annual General Meeting of the North Sydney Squash Club

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: Cameron Strong

Date: 30 October 2020

Templates

There are many templates for business forms which can be downloaded from Microsoft Office Online.

Visit Microsoft's website and select **Templates**. There you can download a variety of pro-forma documents such as agendas, brochures, business cards and flyers. Alternatively, in Microsoft Word, 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.

Information 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 cannot 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 in 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.

Question 1

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

Question 2

The report has three sections. What are they?

Question 3

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

Question 4

What do you observe about the layout of the document?

1C Ensure consistency of design with organisational 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 and the intended audience.

Consistent design ensures that the layout of the content flows smoothly to help users navigate and understand, and will help you create a final presentation that looks professional. Use consistent design techniques 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 the last two items in a list are separated by a comma. Capitalisation in headings must be consistent; for example, in this unit only the first letter of headings are capitalised. This style 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 or right, or centred. 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

Typically, margins are set up to be the same for left and right, and for top and bottom. If indented paragraphs are used, set these up to be consistent. Use the header and footer features of Microsoft programs to ensure consistency of headers and footers throughout your document.

Basic design principles

Following some basic design principles will ensure your document is well presented and easy to read.

Contrast

Contrasting elements, such as changes in font, colour and layout, can engage readers and draw their attention to important features in the document. Look at this learner guide and notice how the heading size changes and the font is different for some features. When contrasting features are used repeatedly and consistently, it helps the reader recognise similar parts of the document and makes it easier to read.

Repetition

Repetition refers to repeated visual elements, such as use of colour, shape, columns, headers and callout boxes. Repeated design elements help readers understand the structure of the document.

Alignment

Alignment refers to how the text, images, headings et cetera are positioned in the document. For example, texts can be left or right justified, or centred. Text columns, tables or pictures can line up evenly. Captions can be anchored next to images. These factors ensure the proper flow of information and make the document easier to read.

Proximity

Proximity refers to the placement of elements such as text, images and tables together so that it makes sense and allows the document to flow better. Sometimes you may have to place detailed tables or information in an appendix, but the reference to the appendix should be close to the relevant information in the document.

Here are some design tips that might be helpful when preparing your document.

Design tips

- 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.

Practice Task 3

Question 1

This document has numerous design and layout inconsistencies. Highlight each inconsistency 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

Consistency in the format and style of business documents is always important.

Looking at an existing sample of a document is a good place to start. Once you have developed a plan, try to clarify it with the end user or 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.

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 on 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 format and style

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

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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 and answer the following questions.

Question 1

Which report is easier to read?

Question 2

Describe the design principles used in the first report.

Question 3

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

Summary

- Business documents communicate and organise information.
- Select appropriate technology and software applications to produce the business documents your organisation requires.
- The layout and style of a document is critical to its overall appearance and clarity. It has to be prepared in line with organisational requirements and audience needs.
- The document design must be consistent with organisational or client requirements and follow basic design principles.
- Before preparing a document, clarify the format and style with the person requesting its publication.

Learning Checkpoint 1

Select and prepare resources

Part A

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

2. Four pieces of business equipment are available in an organisation:

- Computer
- Scanner
- Photocopier
- 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 applied design principles consistently 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 applied design principles consistently 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.

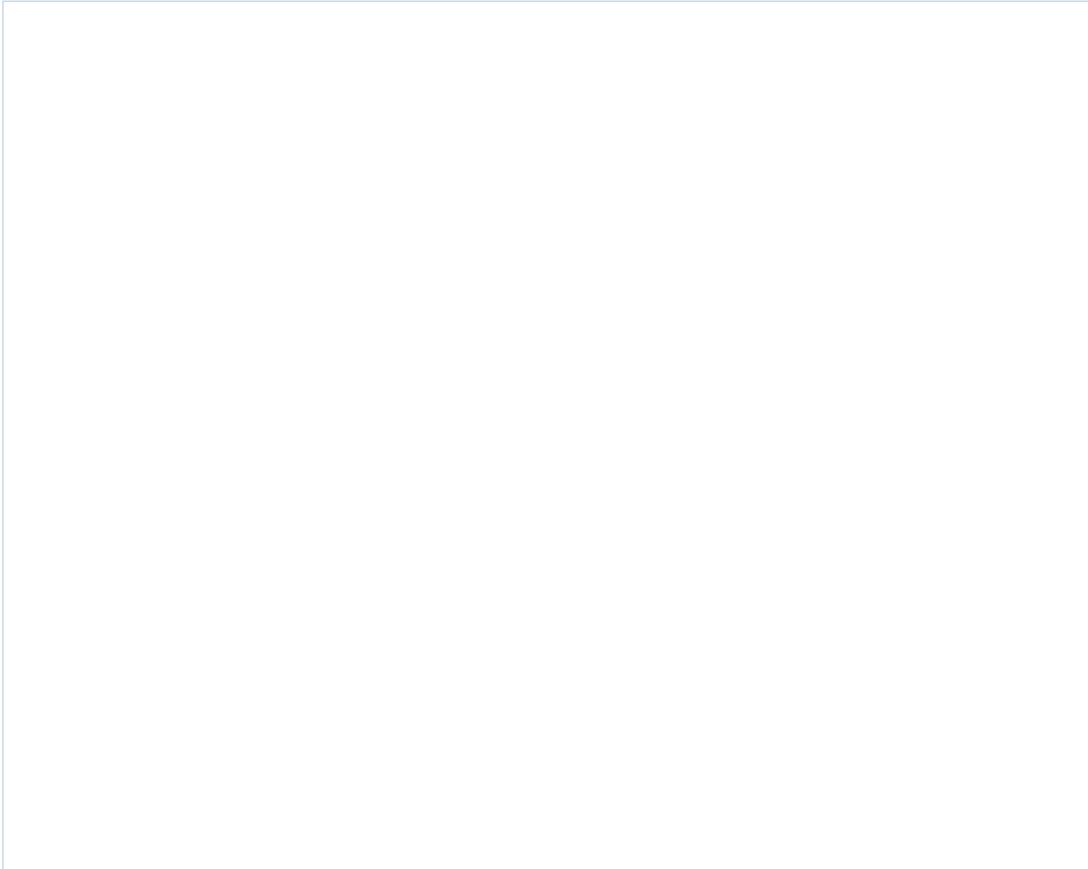
One day Eleni was asked to put together some information describing the progress of a new project. Eleni assumed this information was for her colleagues. She wrote a detailed report outlining the project's progression.

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 text-based documents, as they do not 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

- 2A Identify, open and create files
- 2B Design the document and ensure efficient entry of information
- 2C Use a range of functions to design the document

2A Identify, open and create files

A file can contain any kind of information; for example, board meeting minutes, a report or accounts statements. You can save files as different file types depending on the software you use.

When producing a business document, you may need to access other documents that contain information you need. To get started, identify all the files and resources you need. Examples are other reports, data from spreadsheets and images. If you do not know where to find these, ask your manager or colleagues for the file location or ask that they email these to you.

You could then create a new folder for these files so you have everything in one location while you are working on your business document. To create a new folder, use File Explorer to navigate to the place you want to save the folder, use your keyboard to create a new folder by typing Ctrl+N and then name your new folder.

Open files

Copy the resources you need into a folder and open them by double-clicking on the file name. If the software application related to that file is not already open, it will launch as your computer opens the file.

Create files

To create a new file for your business document, open the software you want to create the document in and use Ctrl+N to create a new document. You may be prompted to choose a template for that new file. You should save the file immediately, giving it an appropriate name.

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 identification (ID) numbers. If this is the case, you may need to generate a new code or ID number for the new file.

Practice Task 5

Tahli has been set a task to produce a price list of all the company's current products. His manager tells him he can find everything he needs in the product folder.

Question 1

What type of business product is Tahli producing?

Question 2

Tahli opens the product folder and finds the following files. Which files should Tahli select for the task?

- Current-products.xlsx
- Product-pricing.xlsx
- Company-logo.jpg
- Product-manufacturing-costs.xlsx
- Price-list-template.docx
- 2018-price-list.pdf
- Production-timelines.xlsx
- Product-showcase.ppt

Question 3

Which programs can open the following file types?

- .docx
- .xlsx
- .pdf
- .ppt

Question 4

What program should Tahli use to create the price list?

Question 5

What should Tahli name the document he is creating?

2B Design the document and ensure efficient entry of information

Efficient entry of information helps streamline the process of document preparation.

If you have all the information you need before starting, you can sort it into a logical sequence.

By taking some time to plan and design your document, you can ensure that information can be entered efficiently and that you do not waste time later moving content around and restructuring your document.

Use design tools to help you enter information efficiently

In Microsoft Office, you can use themes, templates and styles to quickly set up a document that will allow for efficient entry of information.

Your organisation may already have preset themes, styles and templates to use so you should always refer to your style guide before designing your document. However, it is simple to choose and modify themes, templates and styles to suit your task.

Themes

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 the formatting instructions in that style are applied at one time.

Example

Apply a document theme

To apply a predefined theme, take the following steps.

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

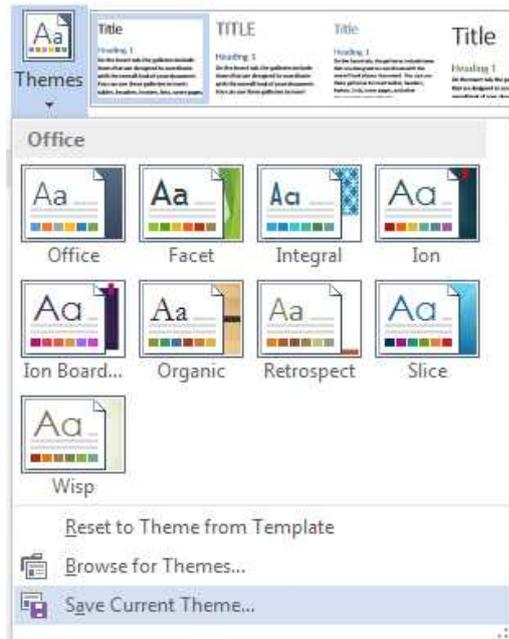
To customise a document theme, you start by changing the colours, fonts or line and fill effects. Changes that you make to one or more of these components immediately affect the styles that you have applied in the active document. If you want to apply these changes to new documents, you can save them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

Example

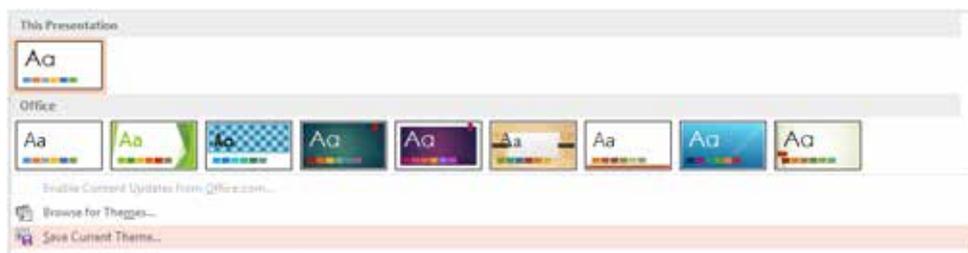
Save a document theme

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.

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



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.

Templates and styles

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

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

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

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

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

Each style is identified as either a paragraph style (marked by the symbol ¶) or character style (marked by the symbol a).

Experiment with using different styles, and changing and modifying styles.

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

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

This style will then appear in the Styles gallery.

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

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



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

Once you have designed a document, it needs to be formatted.

Organising the content and structure of your document is the first step. 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.

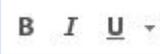
Although many software programs have formatting options, this topic will only describe the functions of Microsoft Word.

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, Center, 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 to 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 in 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 in 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.

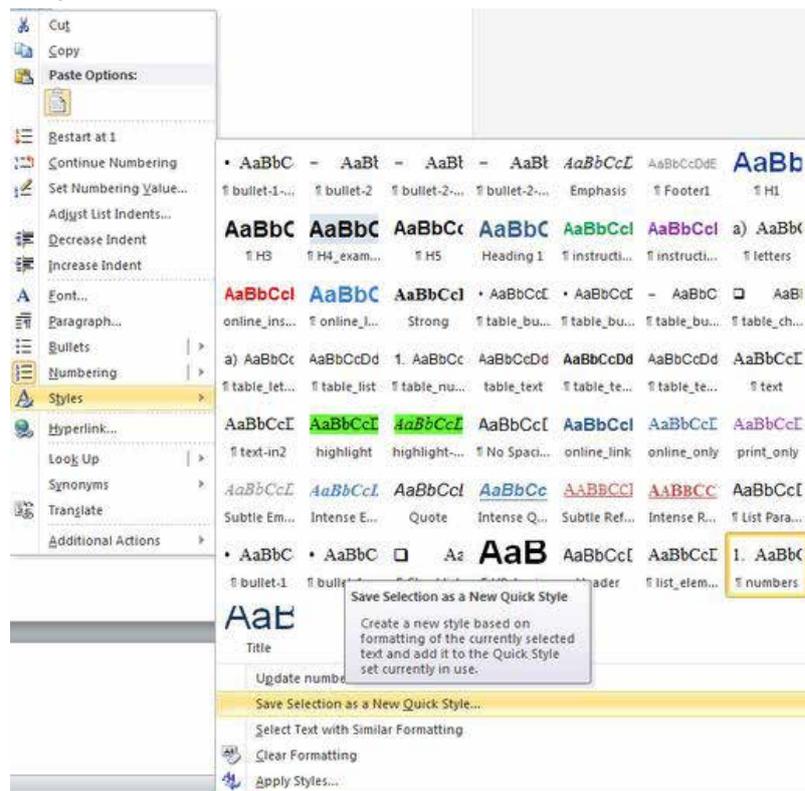
Styles allow you to work quickly and consistently throughout a document. If you want to change the appearance of a style in the text, you simply modify the style properties and reapply the style.

Example

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 extra 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, ready for you to use whenever you want text to be bold and red.

Example

Change existing styles

Alternatively, you may want to change an existing style in 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 and usually contain information about the document.

They 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 a section of the document, or can run through the entire document.

Example

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.

Example

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**.

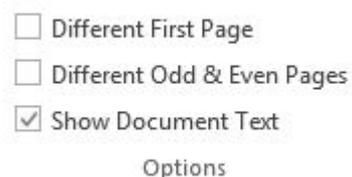


2. Click **Edit Header**. This takes you to the **Header & Footer Tools** tab.
3. Insert text or graphics.
4. To save the header that you created to the gallery of header options, select the text or graphics in the header or footer, and then click **Header** as before. This time click **Save Selection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

If you want to change a header that you inserted, find the **Headers & Footer** 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.

You can customise a table to suit the needs of your workplace. They are often 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 columns or the height of 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.

Example

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 using the **Tab** key. To move your cursor back to the previous cell, just click in 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
<i>War and peace</i>	Leo Tolstoy	\$35.00
<i>A tale of two cities</i>	Charles Dickens	\$40.00
<i>Pride and prejudice</i>	Jane Austen	\$25.00
<i>Little women</i>	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.

Example

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	<ol style="list-style-type: none"> 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.
Using the menu option	<ol style="list-style-type: none"> 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
<i>War and peace</i>	Leo Tolstoy	\$35.00
<i>A tale of two cities</i>	Charles Dickens	\$40.00
<i>Pride and prejudice</i>	Jane Austen	\$25.00
<i>Little women</i>	Louisa May Alcott	\$30.00

Example

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 column into your table. Follow these steps.

Insert a row	Place your cursor in the last cell of a table and press Tab . OR: <ol style="list-style-type: none"> 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.
Insert a column	<ol style="list-style-type: none"> 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.

Example

Delete columns and rows

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

Delete a row	<ol style="list-style-type: none"> 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.
Delete a column	<ol style="list-style-type: none"> 1. Decide which column you want to delete and place the cursor in that column. 2. Select the Layout tab and the Rows & Columns group. 3. Select the Delete option. 4. 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
<i>War and peace</i>	Leo Tolstoy	\$35.00	E23
<i>A tale of two cities</i>	Charles Dickens	\$40.00	E24
<i>Pride and prejudice</i>	Jane Austen	\$25.00	E25
<i>Little women</i>	Louisa May Alcott	\$30.00	E26
<i>Tender is the night</i>	F Scott Fitzgerald	\$25.00	E27

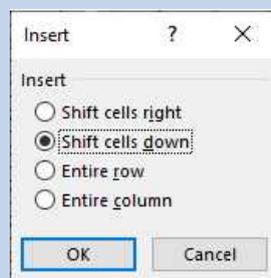
Example

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

Example

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

Example

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

Tracking changes, and merging and comparing documents are useful techniques to help when multiple people work on documents.

Business documents are often written by a number of people. Multiple people can also be involved in the edit.

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 Microsoft Word to track the changes you make using revision marks to show these. The changes – which can include insertions, deletions, moved text or graphics, and formatting – 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.

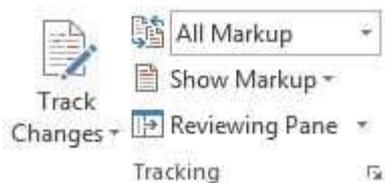
Example

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.



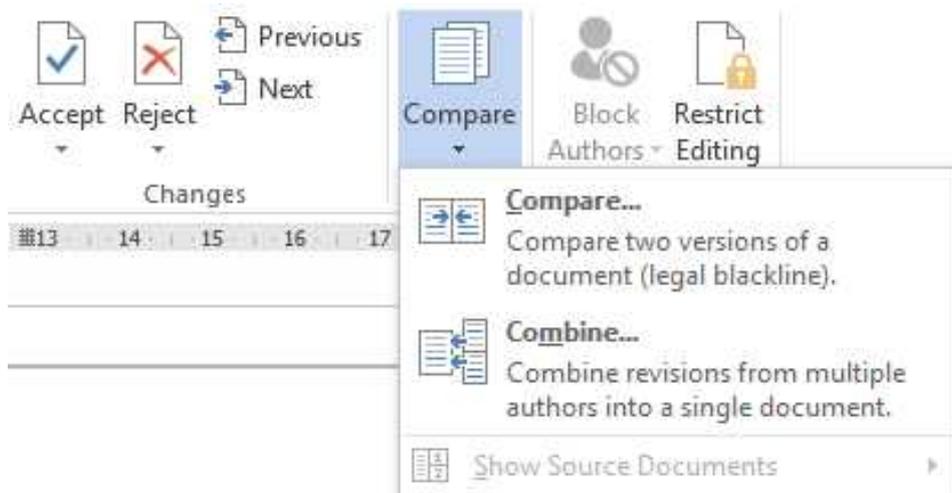
3. Make the changes that you want by inserting, deleting, moving or formatting text or graphics. You can also add comments. Word will track these changes as you make them. Save the changes and close the document.

Example

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**.



Merge documents continued...

3. Under **Original document**, click the name of the document into which you want to combine the changes from multiple sources. If you do not 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 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 do not need to track formatting changes, you can clear the **Formatting** check box, which is a pull-down menu under **Show Markup**.

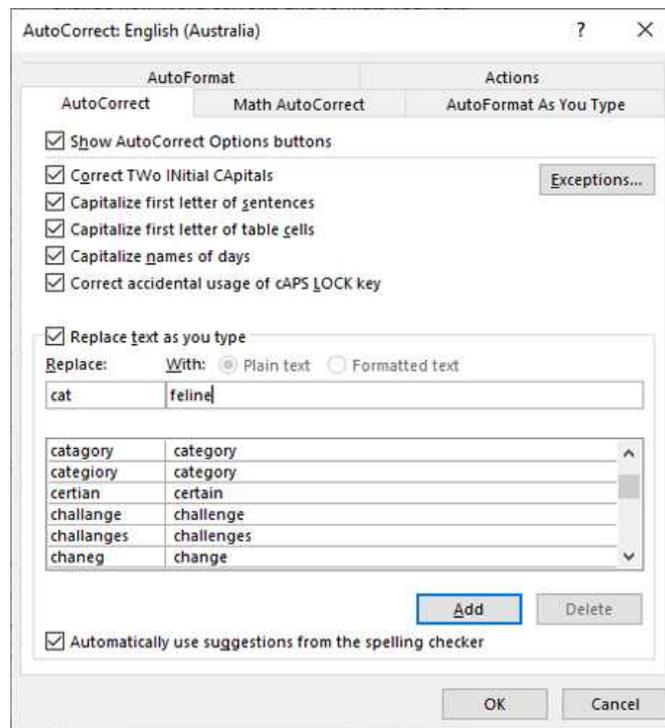
Spellcheck and edit

Spelling and grammar mistakes can change meaning and or 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)

You can use the AutoCorrect feature to correct typos and misspelled words, as well as to insert symbols and other pieces of text. The AutoCorrect feature can be a very useful function. It means that Microsoft Word will automatically alert you to the words you misspell. 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.

Example

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 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 yourself, Microsoft Word provides a useful grammar check that you can use.

The grammar check identifies potential errors in punctuation and the use of verbs. It may also identify 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

Question 1

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 lower-case 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.

Summary

- People who produce business documents need to identify, open and create files according to task and organisational requirements.
- Staff need to create, update and store their files in suitable locations so that they can be easily accessed and maintained.
- A business document is formatted to improve the presentation and appearance of information.
- Designing and formatting a document is about organising the structure and style to maximise the readability and understanding of the information.
- A range of software functions can be used to design, format, edit, merge, check and improve the presentation of a document.

Learning Checkpoint 2

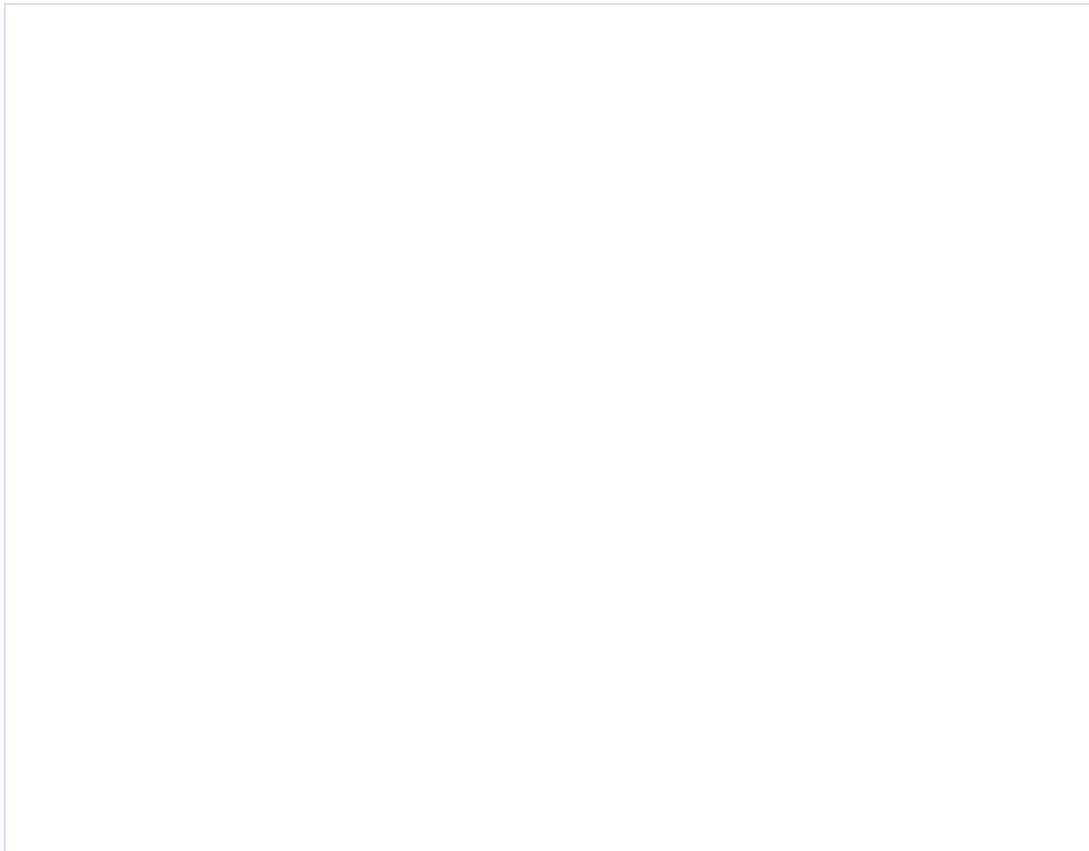
Design the document

Part A

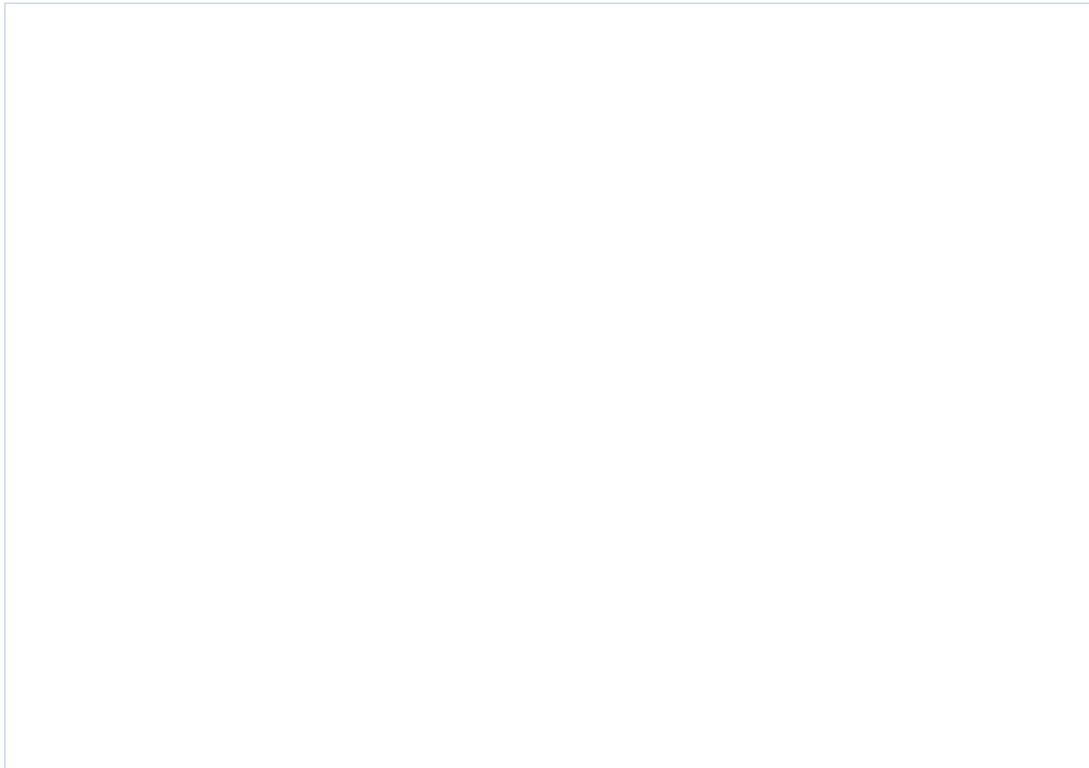
1. Create a simple business document using Microsoft Word. Format the document and write down the specifications of the formatting you choose.

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. Imagine that you are training someone to use a keyboard. 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, and 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 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 needs 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 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 needs of your place of study or home.

Part C

Access and download [employee-inquiry-sheet.docx](https://aspirelr.link/employee-inquiry-sheet) at: aspirelr.link/employee-inquiry-sheet

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

- 3A Complete document production according to organisational requirements
- 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 according to organisational requirements

Whenever you have to produce a document, you need to ensure it meets organisational policies, procedures and requirements.

Every organisation has different requirements for business documents. Most important is to present an appropriate and consistent corporate image by using the organisation's logo, colour scheme and style.

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

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

Many organisations have established guidelines and procedures for production that you must follow.

Established guidelines and production procedures may include:

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

Time lines

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

A time line is a plan for how long a task will take to complete. It also breaks the task into steps and details when each step needs to be completed by. The time line needs to allow enough time to design, edit and review the document. Your supervisor will often give you a due date or deadline, and it will be your job to monitor and report on your progress.

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

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

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

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

Presenting a consistent corporate image

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

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

A corporate image has several components, including:

- logo
- colour scheme
- house styles and templates.

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

Organisational style guides

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

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

Style guides vary between organisations. They often provide information on the desired writing style and specify the preferred formatting of text and pages with specific layouts and designs of a variety of documents.

Document layout and design may relate to:

- margin width
- font type and size
- spacing of text and paragraphs
- alignment of text
- use of headers and footers and what information they must contain
- reference details, such as a list of sources referred to in a report
- signature blocks and document sign-off
- use of company logos and slogans, and where they must be located.

Below are some styles relevant to writing style and formatting.

Writing style

- Use of abbreviations
- Preferred spelling of particular words
- Use of hyphens
- Use of capital letters
- Use of full stops

Text and page formatting

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

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

Dates

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

Legislation

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

Copyright Act 1968 (Cth)
the Privacy Act

Spelling and hyphenation

C

- checklist
- check-up
- Commonwealth
- coordinate
- cost-efficient

Font

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

Layout

- The left margin must be indented at 4 cm.

Headers

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

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

Templates

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

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

The advantages of templates are shown here.

Consistency

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

Saved formatting

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

Template integrity

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

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

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

Content restrictions

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

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

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

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

Copyright legislation

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

The *Copyright Act 1968* (Cth) sets out copyright legal obligations in Australia. To avoid breaching copyright law, always record the details of any images or text you intend to use from another source and reference them appropriately only if you have been given permission by the copyright holder (including the author and original source).

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

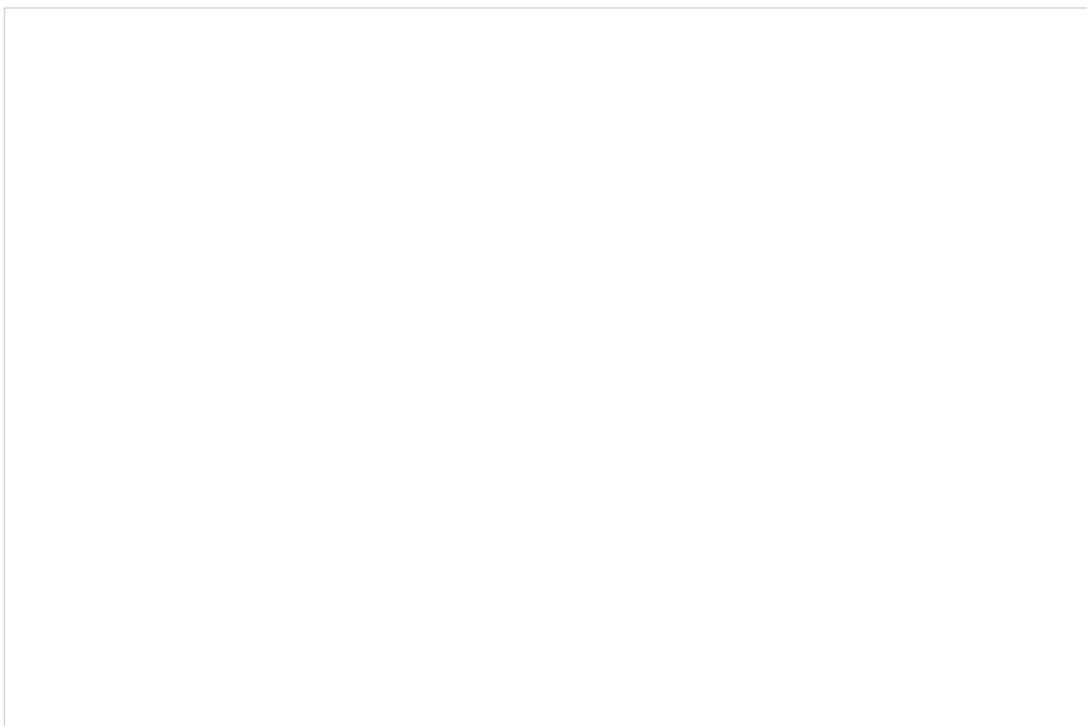
For more information on copyright, visit the Australian Copyright Council's website via: <http://aspirelr.link/australian-copyright-council>

Practice Task 8

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

Question 1

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



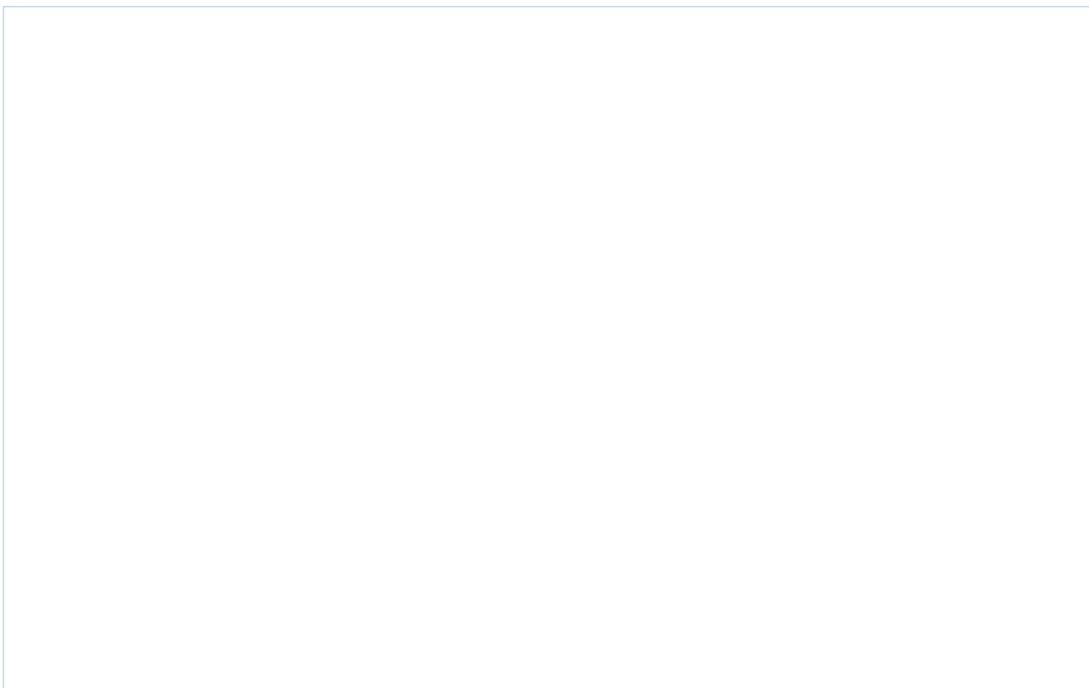
Question 2

List three things that must be included in the document.



Question 3

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



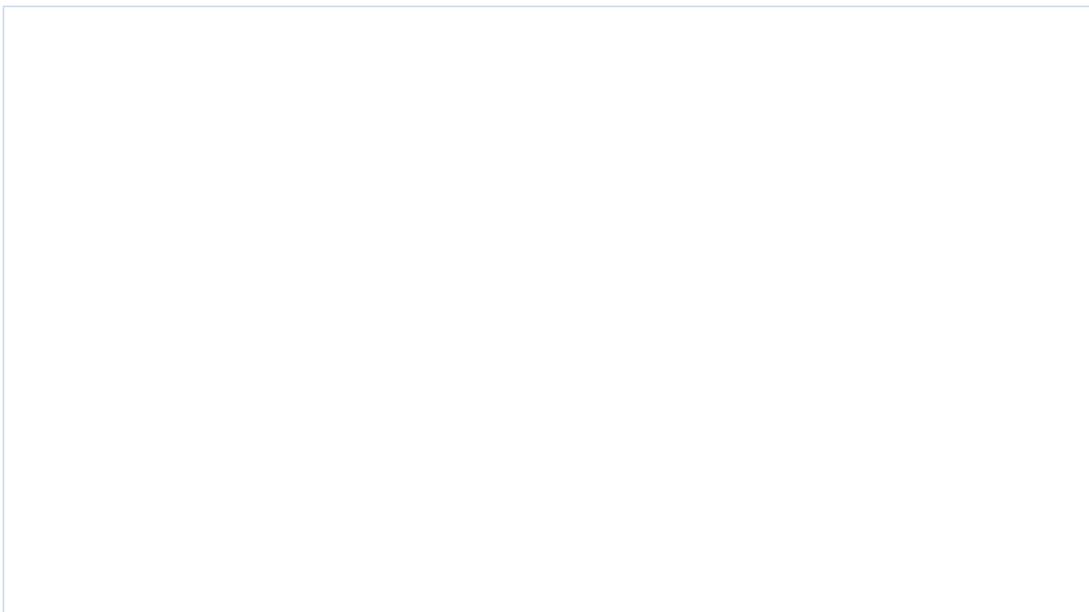
Question 4

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



Question 5

What is the main purpose of using a style guide?



3B Check documents for style and layout

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.

Creating and using a checklist

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 checking documents for style and layout.

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.
- Are fonts, heading sizes, bold and italics used consistently and correctly?
- Consider using styles in your document to ensure and enforce consistency.

Layout

- Does your document layout meet the task requirements?
- Does your document conform to organisational requirements?
- Is your document the correct length?
- Have you allowed for enough white space to maximise readability?
- Do images and tables have accurate captions?
- Do images and tables appear in the correct place in the document?

Practice Task 9

Look at the two documents below and outline what changes have been made to the document on the left to produce the document on the right.



Packers Carpets and Mats

Customer Satisfaction Survey

Please put the completed survey in the box provided on the front counter.

Please take a few minutes to complete the following customer service survey. We appreciate your feedback

How would you rate our customer service?

Telephone:
1 2 3 4 5 6 7 8 9 10
Poor Excellent

In person:
1 2 3 4 5 6 7 8 9 10
Poor Excellent

What can we do to improve our customer service? Please give us some suggestions.

How would you rate the product knowledge of our staff?
1 2 3 4 5 6 7 8 9 10
Poor Excellent

From which products do you think our staff could benefit from additional product training? _____

When browsing in our store do you find it easy to locate products? Yes / No
If No, what difficulties do you have?

Were all our products priced clearly and correctly? Yes / No
If No, how often do you find items that are not priced or priced incorrectly?

Have you had any other problems shopping in our store? If so, please give a brief description.

We appreciate you taking the time to complete this survey.

Packers Carpets and Mats

Customer Satisfaction Survey

Please take a few minutes to complete the following customer service survey.
We appreciate your feedback



Q1. How would you rate our customer service?

Telephone:
1 2 3 4 5 6 7 8 9 10
Poor Excellent

In person:
1 2 3 4 5 6 7 8 9 10
Poor Excellent

Q2. What can we do to improve our customer service? Please give us some suggestions.

Q3. How would you rate the product knowledge of our staff?
1 2 3 4 5 6 7 8 9 10
Poor Excellent

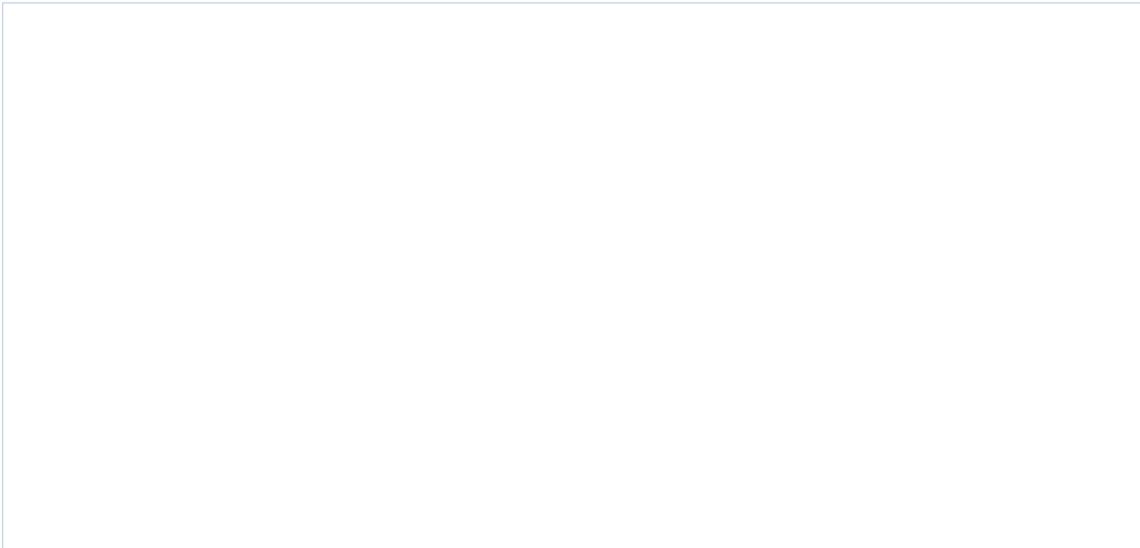
Q4. From which products do you think our staff could benefit from additional product training?

Q5. When browsing in our store do you find it easy to locate products? Yes / No
If No, what difficulties do you have?

Q6. Were all our products priced clearly and correctly? Yes / No
If No, how often do you find items that are not priced or priced incorrectly?

Q7. Have you had any other problems shopping in our store? If so, please give a brief description. _____

We appreciate you taking the time to complete this survey.
Please put the completed survey in the box provided on the front counter.



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 username. 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.

Example

Save a new Word document

When saving a document using Microsoft Office 2013 applications, there are different options compared with what was available in previous versions.

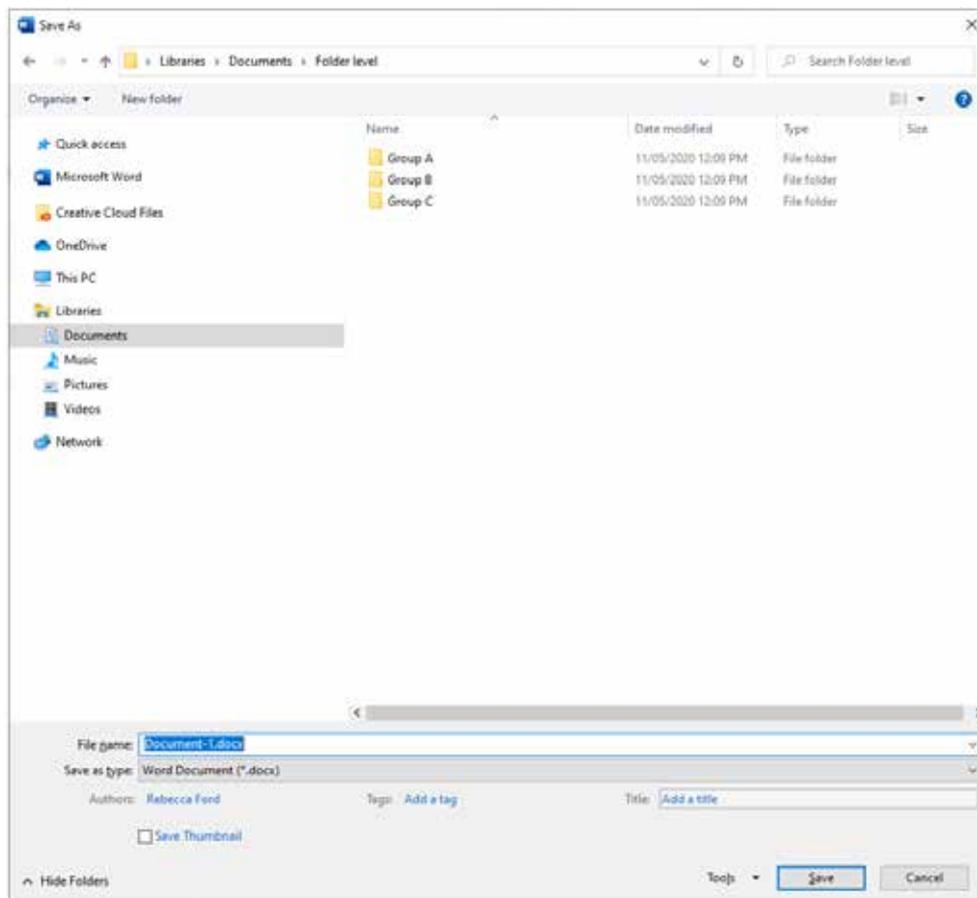
When using Word, to correctly save your document to avoid loss of data: Click options in the **Save As** dialogue box to save a file to a file name, format and location that you specify. If you are saving a file that has not been saved before, the **Save As** dialogue box appears automatically when you 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 a new Word document continued...

- **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 structured folders. 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.

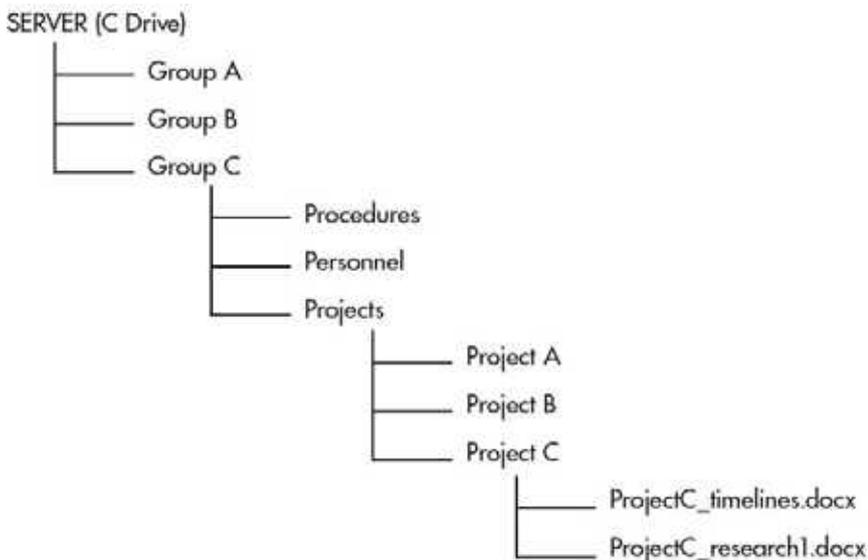
If your organisation has a shared directory, you need to decide whether a document should be placed in the directory or stay on your own hard drive. This is because some documents are for your use only and others need to be shared.

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

Digital storage

Your organisation will have policies and procedures in place when it comes to storing data. Most organisations prefer employees to store files on a server in their building which is backed-up regularly or onto an internet server, often referred to as the cloud. Unless you are without access to your server or the internet, it is good practice not to save files onto the hard drive of your computer or digital device as failure of the hardware could result in data loss.

Practice Task 10

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 electronic 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 the information.

Question 1

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

Question 2

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

Question 3

Explain why organisations need procedures for storing and securing information.

Question 4

List four advantages of using a shared directory.

3D Overcome basic difficulties with document design and production

You will often experience difficulties when designing or producing business documents.

Nothing in life is trouble free. The business technology you are using might fail or the software might crash. Whatever the problem, it helps to have a plan for dealing with the unexpected. Some organisations may have a helpdesk set up to aid employees.

Use online help features

If you are working in a Microsoft Office 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 extra 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 extra 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

- 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.

Online 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 come with a user manual that describes the features and gives step-by-step instructions for use.

Manuals include information about functions, maintenance, use, work health and safety 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	Microsoft Office Applications
<p>http://support.microsoft.com</p> <p>This is Microsoft's main site for finding help with Microsoft Office 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.</p>	<p>http://office.microsoft.com</p> <p>This site provides resources for all Office applications. It has news, announcements and useful files for you to download.</p>

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 11

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 often, keeping them in a Help folder on her desk.

Question 1

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

Question 2

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

Summary

- 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. To meet a due date you need to first define the scope of the document, understand organisational requirements and know who your audience is.
- 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.
- Data needs to be safeguarded against accidental or deliberate damage by appropriate storage of documents and consistent saving and naming methods.
- Online Help is a good place to access help and overcome difficulties.

Learning Checkpoint 3

Produce 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 'produce 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

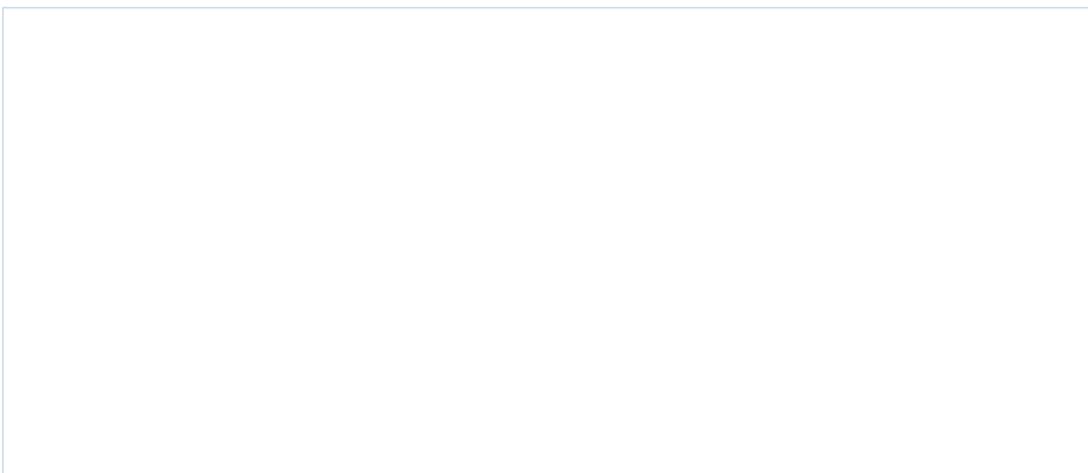
Office Temp is an organisation that supplies temporary office staff. It has four work groups, each with two major areas of operations: Temporary Staff CVs and Client Information. Multiple files need to be stored in folders representing each area of operation. All staff CV files must start with CV and 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.



Part C

1. Produce a business document such as a newsletter or 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.

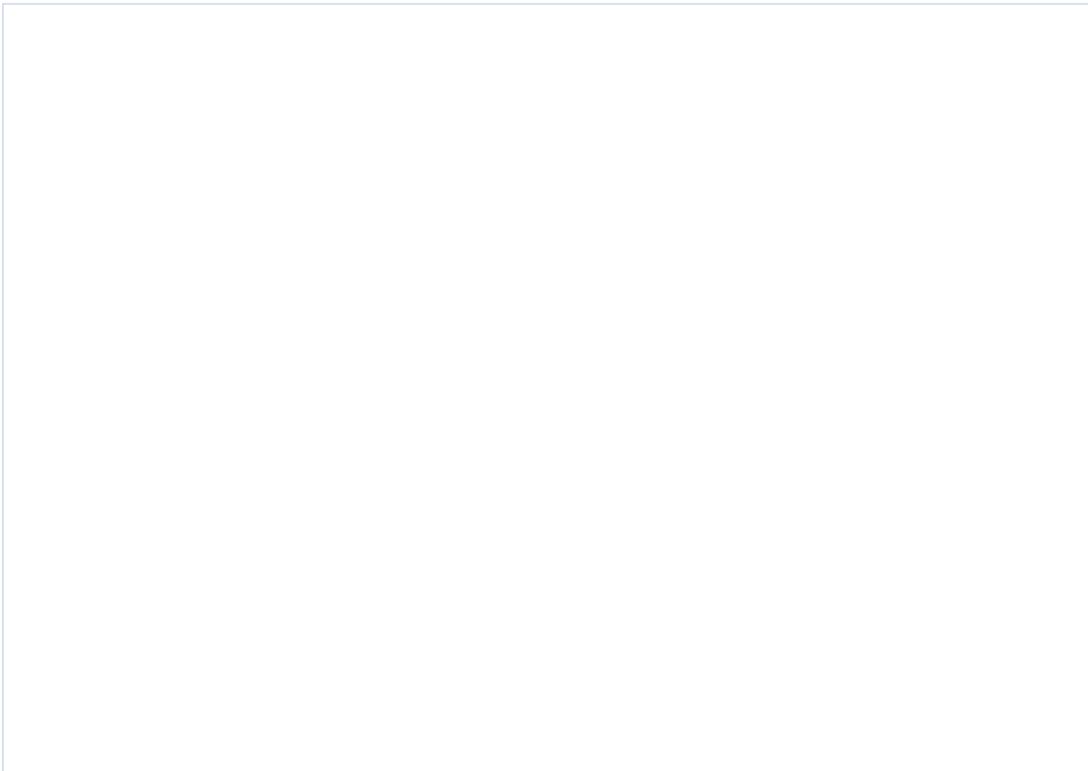




2. Store the document in an appropriate way. Explain how you have done this.



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





Topic 4 | Finalise the document

- 4A Proofread the document prior to final output
- 4B Make modifications
- 4C Name and store the document, and exit the application
- 4D Present the document

4A Proofread the document prior to final output

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).

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

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

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

Document type

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

Audience, purpose and contents

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

Spelling, grammar and punctuation

Be aware that an electronic spelling and grammar checker will not always pick up words that are used inappropriately (such as using 'there' instead of 'their'), so it is better to also proofread your document. Words may also be spelt in different ways; for example, American and Australian spelling for words such as organize/organise. Check the in-house style manual. You will need to use your discretion to decide whether the suggested option is the best (or even correct!) one.

Style

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

Numerical and statistical data

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

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.

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 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 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

Tips and tricks for proofreading:

- Consider printing a copy of the document; you may find it 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 do not depend on them entirely.
- Double-check any numbers.
- Allow time between completing the final copy and proofreading; then look at it with fresh eyes.
- Proofread when you are most alert.
- Do not 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.

Practice Task 12

Edit and proofread this business document. 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 (i.e. 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.

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.

4B Make modifications

Once you have proofread the document and identified errors or inconsistencies, you will need to modify (or edit) it.

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.

You have already learnt about the edit feature of tracking changes in Microsoft Word, 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

Example

Enable editing for a document that is marked as final

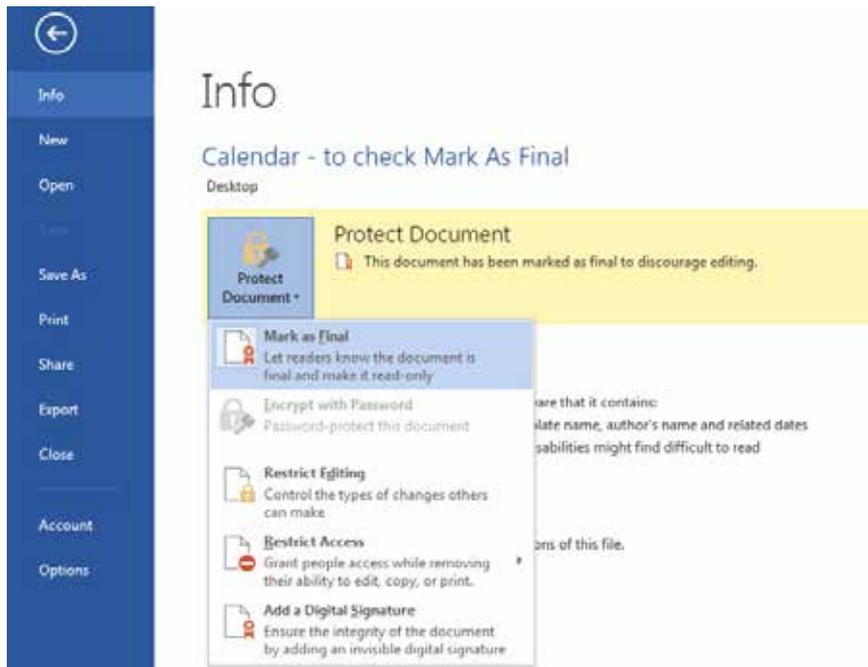
You may need to modify a document that has been marked as final at a previous time, and therefore is only accessible in read-only format.

In Microsoft Office 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.

Enable editing for a document that is marked as final continued...

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 allows you 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. Be careful when using the **Replace All** feature that you do not create problems such as incorrect case. Unless you are able to narrow down your search criterion, it may be better practice to replace one word at a time rather than replace all.

Example

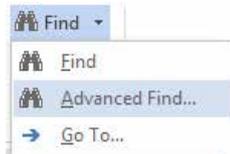
Find text

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**; or use the shortcut **Ctrl+F**.
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...**



Example

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** (or **Ctrl+H**).



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**.

Example

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 (Ctrl+H)**.



To search for text with specific formatting, type the text in the **Find what** box. To find formatting only, leave the box blank.

2. Click **Format** (under **More**), and then select the formats that you want to find and replace.
3. 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.
4. 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**.

Example

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 **Special** and then click the item that you want.

Make modifications in Microsoft Excel

Below is a common modification made when using Microsoft Excel. 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 to the end of 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 Overtyping mode so that existing characters are replaced by new characters while you type, press **Insert**.
 - Overtyping mode can be turned on or off only when you are in editing mode. When Overtyping 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** (or **Ctrl+Z**).

Practice Task 13

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

Appropriate naming conventions help in the identification and retrieval of documents.

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.

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

File 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 File 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 pro forma documents (such as memo forms, business letters, order forms and letterheads), it would be logical to name them this way, rather than by Pro forma memo and Pro forma letterhead as then they would all begin with the letter 'P'.

Alternatively, in 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, 20180401BoardAgenda (for a document dated 1 April 2018) or, particularly for monthly meetings, simply use the year and month; for example, 2018-04BoardAgenda. 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.

Some software applications are set up to auto save your file as you work on it. However, it is good practice to always ensure you save your file before you close it or before you leave your desk.

You would have already named your document when you created it. However, you may need to make a copy or move it to a final folder. Your organisation will have guidelines on where files should be saved so they can be found and protected against loss.

Ensure that you know where the file should be saved and if you must keep a copy of it.

Exit applications safely

When exiting an application, you need to ensure that you understand the method of saving before exiting that is applicable to the program you are using.

Always save before exiting and ensure that all windows that are open in the program are closed correctly before closing the program. Never shut down your computer until all opened applications have been closed properly.

You can exit Microsoft Office 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.

Practice Task 14

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

Case study

Datu has retired from an organisation after working there as an administrative assistant for 10 years. He had been responsible for two areas: Accounts and Projects. The day after he retired, somebody urgently needed a file that Datu had created and stored. The file contained vital accounting information. It was discovered that Datu had saved more than 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.

Question 1

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

Question 2

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

Question 3

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

4D Present the document

Once you have done a final proofread of your document for spelling, grammar, consistency and style, you are ready to print or send 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 documents are printed with a glossy, coloured front page and remaining pages are black and white. Familiarise yourself with your organisation's requirements.

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 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 (or **Ctrl+P**).

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 Printer, Settings and number of copies are correct.
Copies	Click the arrows to increase or decrease the number of copies that you want printed. You can also type the number 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 dialogue box.

Settings	
Print All Pages	You can choose to print the entire document, the current page or specific pages. 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	Enter the page range you wish to print.
Print One Sided	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	Select either Portrait Orientation or Landscape Orientation.
Paper Size	Select the paper size you will be printing on.
Margins	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 dialogue box.
Pages Per Sheet	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 dialogue 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 before 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** or **Ctrl+P**.
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 dialogue box and then select from the options on the **Page, Margins, Header/Footer** or **Sheet** tabs.

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 (Ctrl+P)**.
3. Click on **Full Page Slides**. 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 to print handouts in colour, grayscale or black and white. From the main **Print** page, the last drop-down menu under **Settings** lets you make this selection.

4. To change the page orientation, click the **Portrait Orientation** drop-down menu, and select **Landscape**.
5. Click **Print**.

Printing tips

Many devices and programs are needed 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 use the correct paper.

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 does not 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, consistent in style and professionally presented. Following are some of the various ways that business documents can be presented.

Electronic	Hard copy
<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • Printed, collated and stapled documents • Bound book presentations • Printed documents in 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 15

Question 1

Describe the appropriate methods of presentation to present a yearly financial statement.

Question 2

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

Question 3

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

Summary

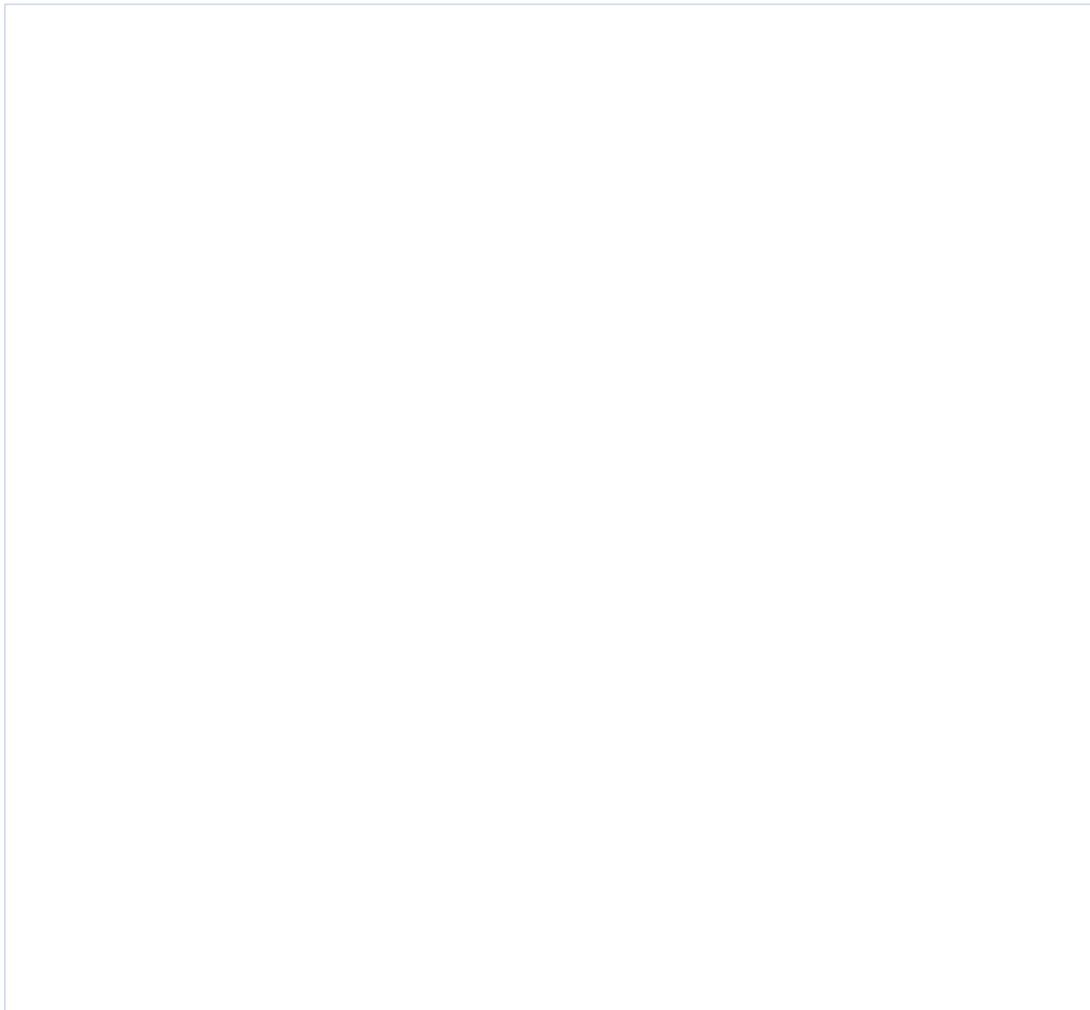
- Before the final production of your document, you need to carefully proofread it for readability, accuracy and consistency of language, style and layout.
- There are many useful and practical tips to assist you in proofreading.
- Once identified, the errors or inconsistencies in the proofread document need to be assessed and modified as appropriate. The changes you make will depend on your computer software, and the type of business document and modification being considered.
- 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.
- 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.
- 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; for example, in an email or via a data projector screen.
- No matter which form of final presentation is used, the critical aspect is that the information in the document is clear, accurate, consistent in style and professionally presented.

Learning Checkpoint 4

Finalise the document

Part A

1. Explain what methods you use in 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 lists tips for best-practice proofreading. You can refer to websites or other reference material. Your document should be in a format that is readable, accurate and displays consistency of language, style and layout. When complete, have someone review your document, make modifications and name and store this document appropriately – according to organisational requirements.