

BSB 7.0

BSBTEC203

**RESEARCH
USING THE
INTERNET**

BSBTEC203

Research using the internet

Release 1

Learner Guide

Aspire Version 1.1



Copyright Warning

**This product is copyrighted to Aspire Training & Consulting
(ABN 51 054 306 428).**

Aspire Training & Consulting owns all copyright to its products. Except as permitted by the Copyright Act 1968 (Cth) or unless you have obtained the specific written permission of Aspire Training & Consulting, you must not:

- reproduce or photocopy this product in whole or in part
- publish this product in whole or in part
- cause this product in whole or in part to be transmitted
- store this product in whole or in part in a retrieval system including a computer
- record this product in whole or in part either electronically or mechanically
- resell this product in whole or in part.

Aspire Training & Consulting:

- invests significant time and resources in creating its original products
- protects its copyright material
- will enforce its rights in copyright material
- reserves its legal rights to claim its loss and damage or an account of profits made resulting from infringements of its copyright.

Aspire also has learning resources available in these areas:

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

Aspire is committed to developing quality resources that meet the needs of our customers. However, occasionally Aspire finds, or is notified of, errors. Please refer to our website at www.aspirelr.com.au to see if there are any updates that may be relevant to you.

Every effort has been made to ensure the information in this book is accurate; however, the author and publisher accept no responsibility for any loss, damage or injury arising from such information.

Except where an information source is acknowledged, the names and details of individuals and organisations used in examples are fictitious and have been devised for learning purposes only. Any similarity to actual people or organisations is unintentional.

All websites referred to in this unit were accessed and deemed appropriate at time of publication.

Aspire Training & Consulting apologises unreservedly for any copyright infringement that may have occurred and invites copyright owners to contact Aspire so any violation may be rectified.

BSBTEC203 Research using the internet, Release 1

© 2021 Aspire Training & Consulting
Level 1, 464 St Kilda Road
MELBOURNE VIC 3004 AUSTRALIA
Phone: (03) 9820 1300

First published March 2021

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

e-ISBN 978-1-922466-37-2 (PDF version)
ISBN 978-1-922466-36-5

Contact details

Participant
Name:
Start date:
Phone number:
Email:
Work location
Name:
Address:
Postal address:
Workplace supervisor name:
Phone number:
Fax:
Email:
Registered Training Organisation (RTO)
Name:
Address:
Postal address (if different):
Phone number:
Fax:
RTO contact name:
Mobile:
Email:

CONTENTS

Before you begin	vi
Topic 1 Plan research	1
1A Confirm research task and objectives	2
1B Identify sources for research information	6
1C Select application and search engine	17
Summary	22
Learning Checkpoint 1: Plan research	23
Topic 2 Conduct research	27
2A Access the internet and begin the search	28
2B Collect information according to research plan.....	32
2C Use help functions to overcome issues	36
Summary	40
Learning Checkpoint 2: Conduct research.....	41
Topic 3 Present research	43
3A Document collected information.....	44
3B Deliver document on research	50
Summary	53
Learning Checkpoint 3: Present research.....	54

Before you begin

This Learner Guide is based on the unit of competency *BSBTEC203 Research using the internet*, 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 textual information within organisational and task requirements to determine work requirements
Writing	<ul style="list-style-type: none"> Records numerical and textual information in accordance with requirements of task
Oral Communication	<ul style="list-style-type: none"> Participates in a variety of spoken exchanges with relevant stakeholders in an effort to clarify research purpose, audience and presentation requirements
Self-management	<ul style="list-style-type: none"> Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Technology	<ul style="list-style-type: none"> Understands functions and features of specific digital applications and uses these to perform work tasks

What do you already know?

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

Topic	Key outcome	Rate your confidence in each section
Topic 1: Plan research	1A Confirm research task and objectives	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1B Identify sources for research information	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1C Select application and search engine	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 2: Conduct research	2A Access the internet and begin the search	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2B Collect information according to research plan	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2C Use help functions to overcome issues	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 3: Present research	3A Document collected information	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3B Deliver document on research	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident



Topic 1 | Plan research

- 1A Confirm research task and objectives
- 1B Identify sources for research information
- 1C Select application and search engine

1A Confirm research task and objectives

Research involves a systematic investigation into and study of information from different sources.

Research involves establishing facts. At the end of your research, the facts may lead to a conclusion or course of action.

The instructions you receive for your research task might be given to you by a supervisor or colleague. The details may be provided in a written document, sent in an email or described to you in person. You should ask questions and make sure you understand what you will be required to do and when the task needs to be completed. When you understand the scope of the research task, you can develop a plan to complete the task.

Your task may be to use the internet to research:

- competitor products and prices for the sales manager
- the availability of accommodation for staff attending a business conference
- a suitable venue for an event
- the latest industry regulations or legislation
- information on WHS to present to staff
- the suitability and features for new or replacement office equipment
- training or professional development activities for staff

Purpose, audience and presentation requirements

Ask about the purpose of the research and the proposed audience and presentation requirements.

Completing tasks correctly and efficiently starts with good preparation. Before you begin any research, ask yourself these questions:

- What is the purpose of the task? What will it be used for?
- Who is the audience? Who will be reading or using the finished work?
- How should it be presented? How should the finished work look?

You need to be clear on what is expected. If you are unsure about any of these things, check with your supervisor or an experienced colleague.

The following table provides more information on purpose, audience and presentation.

Purpose

The purpose of research will influence the information you will need to find. Understanding the purpose of the research will help you determine what you are searching for. For example, if the purpose is to gather information on a competitor's products, you will need details on the features and prices of products. The purpose of this task is to compare products and prices of competitors with your own company's.

Audience

You need to be aware of your audience. Knowing who will read or use the information you have collected will determine the amount of information and the level of detail it should contain. For example, will the research be used by your team or will it be distributed to other departments or to managers?

Presentation requirements

Presentation depends on the purpose and audience. For example, a spreadsheet might be used to collate the prices of products for the sales manager. A report on suitable options for a venue for a company event can be presented in a document. Links to webpages for each venue option, may be best sent as an email.

Example

Defining the research task

A busy office has had their workflow and production disrupted due to a broken photocopier. The office manager has asked Sammy to use the time to do some research to find three possible options for a replacement machine. Sammy needs to present the information in an email to her manager by the end of the week. She must provide a copy of the webpage address for each company and a summary of the features and benefits of each in a table. The criteria for the comparison between machines must include:

- cost
- availability and delivery time
- service and maintenance costs.

Research objectives

Objectives provide direction to the research.

Research objectives describe exactly what the research is trying to achieve or what needs to be achieved.

Once you have your instructions you can begin to unpack the problem or issue. You can consult and discuss with your supervisor the objectives of your research.

Objectives should be specific, concise and include an appropriately phrased verb that reflects the purpose of your search:

- 'To describe...'
- 'To investigate...'
- 'To examine...'
- 'To determine...'

For example, if the purpose of your task is to find a new photocopier for the office, what are the objectives of the search?

Objectives:

1. To investigate the features of a photocopier that can scan, print and copy.
2. To compare the features and benefits of three options.
3. To limit the cost to \$3500.
4. To examine the servicing and maintenance plan.

Here is an example of good and poor objectives. A poor objective is vague and use verbs ('get', 'look').

Good objective	Poor objective
To examine the features of a checklist for recording WHS hazards.	Get information on WHS hazard checklists.
To investigate ways staff can record their working hours in a shared database.	Look at some of the types of shared databases for staff to record their working hours.

Example

Establish research objectives

Yasin works as an administration assistant in the Human Resources department of a large retail outlet. The HR department wants to understand why staff don't utilise the online HR system to apply for leave, check their salary and access other personal information.

To establish an objective for his search, Yasin lists the major concepts relating to the problem his manager has described:

- Feedback from staff
- Online HR system

Yasin develops and refines his research objective and checks it with his manager. His objective is now:

To identify a way to collect feedback from staff about their use of the online HR system.

Practice Task 1

Question 1

Draw a line to match each term about a research task to its description.

- | | |
|---|--|
| » Objectives of the research | » The photocopier is broken down and a new one will need to be chosen. |
| » Presentation of the research findings | » The manager will need to choose which photocopier to buy. |
| » Purpose of research | » The details on each photocopier will need to be compared in a table. |
| » Audience who will read the research | » To investigate the features of different photocopiers. |

Question 2

Which of the following relate to instructions for a research task? Tick all that apply.

- At the end of the research, you must provide your own opinion.
- Instructions can be written in a document or email or explained by a manager.
- The objectives of the task help unpack the problem or issue.
- Managers are busy people who don't like to explain instructions.

1B Identify sources for research information

Your research needs to generate the most relevant information in the most efficient way.

A research plan means your research will follow a structured system based on pre-planning. Using a plan will mean you are less likely to go off topic or waste time searching for information that is not relevant to your task.

A research plan will keep a record of the details of your work task and may include the following information:

- An outline of the research task (purpose, audience and presentation), due date, etc.
- Objectives of the task
- Scope of the research
- Key search terms
- Browser, search engine and other applications
- Potential sources of information
- Related policies and procedures
- Date, signature from a supervisor or other person and any additional information relevant for your research

Here is an example:

Research methods	Details
Research task description:	
Dues date:	
Research Details: <ul style="list-style-type: none"> ▪ Purpose ▪ Audience ▪ Presentation 	
Objectives	
Scope of research	
Key search terms	

Research methods	Details
Applications: <ul style="list-style-type: none"> ▪ Search engine ▪ Browser ▪ Other software 	
Potential sources of information	
Related policies and procedures	
Date and signature of supervisor:	
Additional information	

You can get your plan signed off by a supervisor or manager to confirm you have the information you need. They may be able to give you some advice or suggest some useful places to search for the information you need.

Credible sources

One of the elements of basic research methods is to use a verifiable website.

When you are gathering information from the internet, you are not just looking for *any* information. The information provided needs to be from a recognised and trusted source or supported by credible evidence: this is what makes it a 'credible source.'

Assessing the credibility of a source is not always straight forward.

Here are some guidelines:

Characteristics of credible sources	Examples
Unbiased and accurate	<ul style="list-style-type: none"> ▪ It should not include inappropriate images, discriminatory language or selective use of facts. ▪ Conclusions or recommendations should be backed up by evidence and the evidence should be provided or available. This includes reviews from customers. ▪ The reliability of information can be checked by comparing the same information provided on several websites. This might indicate the use of exaggerated claims, facts or figures.

Characteristics of credible sources	Examples
Authored by people with relevant expertise	<ul style="list-style-type: none"> The author (or authors) has qualifications and/or expertise that is relevant to the topic. The author is associated with a reputable institution or organisation such as a Government department or peak body organisation representing an industry.
Current	<ul style="list-style-type: none"> The evidence is current and not too out of date. Depending on the topic it may need to be no older than five years since it was reviewed/updated.
Comprehensive	<ul style="list-style-type: none"> The content incorporates what is already known about a topic. The website is easy to navigate and find your way around. Provides links to other relevant or useful websites. Provides a contact page with ways to communicate with the website owner such as a post a comment, an email or phone number.

Check the date of a website, by finding the publication date of the information or the *last modified* or *last updated* date. Many websites do not provide this information, or it is difficult to locate.

The date can sometimes be found on the bottom of the webpage along with the copyright, privacy or terms of use. On other websites where an article has been published, the date will be in the heading or near the title. Here is an example of these details found in the bottom of the homepage of Business Victoria website.

State Government of Victoria
 © Copyright DJPR 2021
 Page updated: 18 Jan 2021

Characteristics of non-credible sources

It is useful to understand the characteristics of non-credible sources.

You need be aware and question evidence provided from some websites. Any website can claim that the information they are providing is based on evidence, but some forms of evidence need to be questioned such as:

- personal testimonies or anecdote – an account of a person's experience or story
- the claims of a celebrity
- information that has been sponsored or paid for by a commercial company.

Some websites are paid advertisements. Businesses can pay the search engine provider, such as Google, so their information appears at the top of the page when a specific set of search words are used. This doesn't necessarily mean it is not a credible source for information. For example, they could be useful if you are wanting to look at purchasing or comparing prices. You need to keep in mind they have a conflict of interest and will be promoting their product above others.

A note should be added in your research plan about the reliability of the information provided by some websites or you can rank your websites in order from best to least in your research plan.

URL

The Uniform Resource Locator (URL) is a reference to a webpage.

A URL is the web address for a website. It identifies its location on the web and is used to find a website.

When you are searching for information, your web browser will show the URL of the webpage in the address bar. For example: <https://aspirelr.com.au/>

The URL can provide you with some valuable information that can help with your research. It may be part of your task to research information from an Australian website. In that case the **.au** indicates it is Australian.

Official sources that provide reliable and accurate information include government websites and cultural organisations such as libraries. The information provided from these sources are regularly reviewed and provide quality information. To recognise a government site look for **gov.au** at the end of a URL/web address.

Other endings to URLs include:

- .edu = education
- .com = business, companies, organisations
- .net or .org = community groups

You may need to research information provided by several URLs. For example, health information may be provided by a support group (net.au), medical researchers (edu.au) or a health department (gov.au).

Define the scope of your research

Due to the large amount of information on the internet, you will need to narrow down your search.

Finding a lot of information on the issue you have identified can be a good thing – it means there’s a lot of choice to draw from. The downside is that the process of choosing information will be time consuming. This includes removing research that isn’t relevant to your task.

Decide upon the scope of your search to make sure the process of searching and analysis is achievable in the time and resources available to you. Add this information to your research plan.

The table below shows an example of a scope for a research task that requires an investigation into possible training options for staff who need to upgrade their first aid training.

Ways to contain scope	Example of search scope
Limit time period	Using information from a specific timeframe (i.e. current course being offered).
Limit sources	Using 6 sources to find the information required.
Limit context	Searching for information directly related to the training.

If you find you are coming up with too much information, you can repeat this process again and refine your search even further. For example, you may narrow down the search to VET courses or those offered at a registered training organisation.

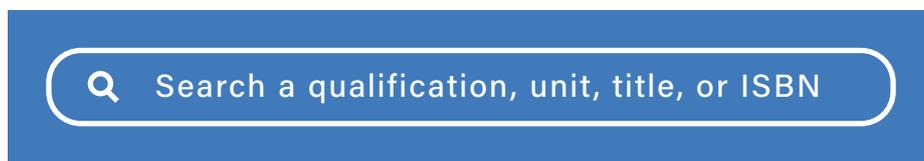
Identify key search terms

Key search terms lead you to the most relevant and useful websites. There are lots of sources of information on how to search effectively on the internet. Many resources are provided by libraries. The following information was taken from the State Library of Victoria website.

Start with a list of broad search terms, then refine them to include more specific words. For example, if the only search term you use is ‘accommodation’ you will retrieve too much information, and it will be too broad and unusable. However, if you refine your search to a few specific words, your search will be limited and more manageable. For example, adding in a location name or type of accommodation such as ‘apartment’, will refine the search.

When you begin your research, you still may not be able to find exactly what you are looking for. You can try using a synonym (a word or phrase with the same meaning) or alternative term for the same thing. For example, replace accommodation with room, house, rental etc. Also try using other words or popular terms. You just need to find the right term to find what you want.

If you know the specific company name, industry or government website, you can go straight to that website. Use the search bar to refine your search within that website. Enter your key search words into the bar provided on the home page.



More tips on using search terms

Here are some other tips to follow when refining your search:

- Search results will show all types of web content. You can add a word to your search to find other formats such as:
 - videos, images or maps.
 - table, chart or infographic.
- To find a procedure or set of instructions, add 'how to' to your search term.
- Add two dots between two prices to search for items in that range such as \$750:\$900
- Use symbols or refinements called search operators to search for specific phrases or information. Here are a few common search operators:
 - find a specific set of words by using quotation marks (“second wave feminism”)
 - exclude results by adding the minus sign (horses-work)
 - find related or similar resources by adding related: to a URL (related:theage.com.au).

To read more about searching online, go to the State Library of Victoria, courses here: apirelr.link/slv-learning

Boolean searches

Add a connecting word such as 'and', 'or', 'not' to get results that are connected to your search words. This is called a Boolean search.

When 'AND' is added it will narrow your results because each of the search terms listed must be included in the results. For example: 'scanning, copying and printing'.

When 'OR' is added it acts like a synonym. This will expand your results because any of the search terms listed can be present in the search results. For example: 'safety or injury or workplace'.

If the word 'NOT' is added, this will limit your search results because words are excluded from the search results. It will ignore any concepts related to the search terms. For example: 'catering not wedding'.

Example

Scope of research

David is investigating the best software option for staff to use for video conferencing. He has listed synonyms and alternative terms for the key concepts. He then selects a scope for his search and documents the details in a plan as follows:

- **Search terms:**
 - Video conference software
 - Meeting software
 - Video conference platform
 - Audio video conference software
 - Home office conference
- **Search scope:**
 - Time period: 2020-2021
 - Context: compatible for Android and Apple products
 - Sources: 3 expert companies' opinion

Organisational policies and procedures

A policy is a plan of action that guides the decisions an organisation makes.

Procedures are developed to help staff take actions to uphold the policy.

There may be a range of policies and procedures in your organisation related to searching and using information from the internet. Policy or procedures can be found in hard-copy or on the staff portal (Intranet). Ask your supervisor which are the relevant policies and procedures and if you are unsure.

Each business will use a different name for their policies and procedures. Here are some examples related to research on the internet:

- Privacy and confidentiality policy
- Copyright policy
- Intellectual property (IP) policy

- Plagiarism policy
- Communication policy and procedures
- Information technology policy
- Computer usage policy
- Internet usage policy
- Social medial usage policy
- Staff email policy
- Code of conduct
- Document control procedures
- File naming procedures

Comply with legislation

Many policies reflect current laws.

<p>Privacy</p>	<p>The <i>Privacy Act 1988</i> (Cth), provides rules about how information can be handled. The key objective of the Act is to protect the personal and sensitive information of an individual's when it is used by government agencies and business. It provides rights for consumers so they can choose to remain anonymous and have their information accessed and corrected. This relates to the use of customer information but also the personal information of staff held by a business.</p> <p>For more information about the Privacy Act 1988 and the APPs, go to the website of the Office of the Australian Information Commissioner:</p> <ul style="list-style-type: none"> • aspirelr.link/oaic-privacy
<p>Copyright</p>	<p>The objective of the <i>Copyright Act 1968</i> (Cth), is to maintain the rights of the author to determine the conditions their work can be used by others. Copyright requires that when someone else's ideas or original work are being used such as an image, their words or ideas, they must be acknowledged. The author may give their permission for their work to be reproduced and an acknowledgement of this is often provided. There are many rules and exceptions for copyright. You can ask your supervisor for more information.</p> <p>There may be information about the copyright requirements for the information you want to use. When you are collecting information from the web, keep a list of the URLs of information you have gathered. Use these URLs as a reference list in a report or document.</p>
<p>Intellectual Property</p>	<p>Intellectual property (IP) is explained as being the property of a person's mind or proprietary knowledge. IP law provides protection rights for new ideas. A new idea that may be an invention, trademark, design, brand or even the application of an idea.</p> <p>For more information about Intellectual Property, go to the Government website IP Australia:</p> <ul style="list-style-type: none"> • aspirelr.link/ip-australia

Example

Sample privacy of information policy

BizOps will only collect personal information where the information is necessary to perform its business activities.

The organisation collects information, including personal information, to:

- manage purchase orders, invoicing and accounts
- supply customers with products and services
- plan, develop and promote products and services
- manage customer complaints and gather feedback.

Where possible, the following information will be provided before personal information is collected:

- why personal information is being collected; particularly if sensitive information is required
- how BizOps will use this information
- how BizOps can be contacted
- how individuals can access their own information
- who this information will be disclosed to.

Example

Excerpt from an IT policy

The following example is an extract from a sample IT policy: section on internet use.

Section 2. Internet use

2.1 General

Although BizOps Enterprises does not at present check personal internet usage of employees, staff should have no expectation of privacy as to their internet usage.

BizOps reserves the right to inspect any and all files stored in all areas including so-called private areas of the network or desktop systems in order to ensure compliance with policy.

BizOps' proxy server is capable of logging individual internet usage. It can identify the site, the category of the site and the user.

BizOps has acquired software and data to identify inappropriate sites and has blocked all access from within our network to all such sites. Some of the internet sites currently blocked by BizOps are Facebook, Twitter, eBay, YouTube and video/music download sites.

2.2 Downloading

BizOps staff are only permitted to download data with direct business use. These include:

- Adobe PDF documents (.pdf)
- Microsoft Word Documents (.doc)
- Microsoft Excel Spreadsheets (.xls)
- Microsoft PowerPoint Presentations (.ppt)
- Images (.gif / .jpg)

BizOps staff must be authorised by their manager or IT coordinator to download software from the internet. Downloaded software must be only used for business purposes. The IT coordinator must be informed to supervise this process.

Any downloaded software and data can only be used in ways that are consistent with licenses or copyright.

All downloaded files must be scanned for viruses before they are run or accessed by the IT coordinator. An automatic scan is set to check all downloaded files.

2.3 Uploading

Data owned by BizOps may not be uploaded without explicit authorisation from the manager responsible for the data. This includes uploading data to BizOps' website.

Uploaded data must comply with advertising laws, unfair competition laws, rights of publicity and privacy.

All employees should exercise thoughtful and responsible behaviour – copyright, libel, slander and public speech control laws exist in Australia and therefore BizOps must take due care not to violate any laws that may be enforceable.

Practice Task 2

Question 1

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

- | | | |
|---|-------|------|
| a) The URL address can be used to identify if the website is Australian. | » Yes | » No |
| b) Begin a search using broad search terms, then refine it to include more specific words. | » Yes | » No |
| c) A policy and procedure provide guidance on compliance with the law. | » Yes | » No |
| d) A Boolean search is adding a connecting word such as 'and', 'or', 'not' to key search terms. | » Yes | » No |
| e) The internet provides unlimited and free information for everyone. | » Yes | » No |

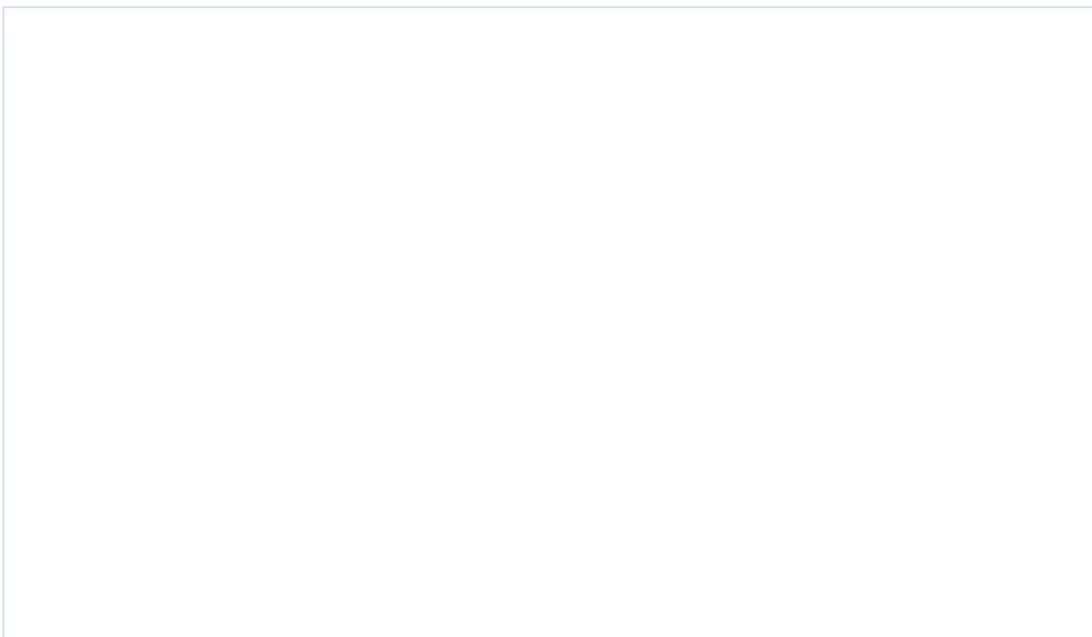
Question 2

Provide two examples of credible information.



Question 3

Give two examples of features of a website that may not be a credible source for information.



1C Select application and search engine

Most organisations have at least one preferred browser and search engine they want staff to use at work.

The software may be loaded and ready for use on computers and devices used by staff.

The policies and procedures on the use of a browser for researching information could be outlined in an internet usage policy, information technology (IT) policy or computer use policy. The appropriate use of the internet might also be mentioned in the staff code of conduct document. This might include the rules for using work computers for personal use or what to do if you come across inappropriate images or other materials that might breach the staff code of conduct.

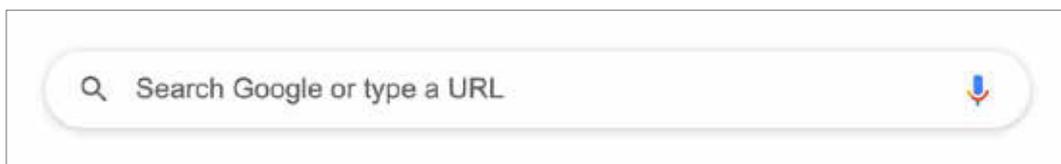
The choice of applications and search engines used in a business will depend on several factors, such as the platform used by the business such as Microsoft or Apple, compatibility with other applications and the available budget and equipment. For example, an organisation may predominantly use Microsoft software, but may also have one or more Apple computers with other software installed.

Check with your supervisor or experienced colleague to find the appropriate procedures and the preferences of your organisation.

Select a web browser

A browser is a type of software that retrieves and displays web pages.

Each browser has an address bar where you enter the web address or URL.



This tells the browser where it needs to go to find the website you want to find.

Examples of browsers include:

- Google Chrome
- Internet Explorer
- Safari
- Firefox.

Types of search engines

A search engine allows you to research the web for information.

When you are researching for information (and you don't know the specific web address), you will need to use a search engine to access the information. A search engine is a website that you go to on your computer or other device.

Search engines are normally accessed through a web browser. This means you can perform search engine searches directly in the address bar of your browser such as Firefox, Chrome, etc. or through a web page. For example a browser such as Firefox will show a Google search box as its start-up page. A browser such as Google Chrome will show Google as its search engine.

These programs search and identify websites that match your key search terms. They access the index of the web rather than the whole web. This means searching and retrieving websites happens quickly.

The search engine may already be loaded and ready to use on the desktop of your device. To find the information you want you will open the search engine and type in your key search terms.

Examples of search engines include:

- Google
- Yahoo
- Bing
- Amazon

Other software applications

Different software programs are more suited to completing work tasks than others.

You may be required to present your research using one or more applications depending on the requirements of the task. A single task may require you to use several different types of software. For example, you might be asked to create a slide show presentation with hard-copy notes. To do this you would need to use both presentation and word processing software.

Here are examples of commonly used types of software.

Word processing

- Word processing software allows you to create, store and print written documents. You can type, edit and insert graphics to create documents that you can easily print and save. The most commonly used word processing software is Microsoft Word.

Spreadsheets	<ul style="list-style-type: none"> ▪ In accounting, a spreadsheet is a large sheet of paper that displays the financial transactions of a company. ▪ Spreadsheet software records and processes accounting and financial transactions. It spreads, or shows, all the information (such as costs, income, taxes) on a single sheet and organises information into columns and rows. The data can then be manipulated by a formula to give a total or sum. ▪ A spreadsheet presents a lot of information in an easy-to-read format. It helps the decision-makers to see the financial 'big picture' of an organisation. The most commonly used spreadsheet software is Microsoft Excel.
Database software	<ul style="list-style-type: none"> ▪ A database organises information in a way that allows you to quickly find a desired piece of data or information. Data is organised by fields, records and tables. ▪ A field is a single piece of information; for example, a client's surname. A record is one complete set of fields; for example, a client's complete name and address. A table is a collection of records; for example, every client's name and address. ▪ A database allows an organisation to store, modify and extract information about customers and products; for example, a database full of client details can be used to extract information about all clients who live in a certain area. Common database software includes Microsoft Access and MySQL.
Presentation software	<p>Presentation software is used to create slide shows or multimedia presentations. It usually includes three major functions:</p> <ul style="list-style-type: none"> ▪ The slide show system to display content ▪ An editor that allows text to be moved around from slide to slide ▪ A graphics system for quickly drawing charts and graphs. <p>Presentation software is frequently used to give a clear, visual display of the points covered in a talk. The most commonly used presentation software is Microsoft PowerPoint.</p>
Email software	<ul style="list-style-type: none"> ▪ Email is a system of exchanging messages using computers attached to a network. Email servers exchange messages using SMTP (Simple Mail Transfer Protocol). Users log into servers to send and receive email using an email protocol (a set of rules). ▪ Every internet domain or host has an email server that manages all addresses in that domain. Each email address is expressed in the form of 'name@domainaddress' and is unique in that domain. A domain address is usually the name of an organisation, its field and location, as in: simone@cheapmovers.com.au. This domain address tells us that Simone works at Cheap Movers, a company (com) based in Australia (au).

Example

Microsoft software icons

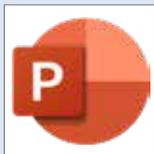
Microsoft Office is the most common suite of business software used in organisations across the world. The appearance of the icons for the software will differ depending on which version of Microsoft Office you have, but generally they can be recognised by the letter on the icon. For example:



Microsoft Word has a W in the icon



Microsoft Excel has an E in the icon



Microsoft PowerPoint has a P in the icon



Microsoft Access has an A in the icon.

Practice Task 3

Question 1

Draw a line to match each term about browsers and search engines to its definition.

- | | |
|-------------------------|---|
| » Search engine | » A type of software that allows the computer to access the internet. |
| » Software applications | » A website that uses key search terms to find websites. |
| » Browser | » Word processing software to create, store and print documents. |

Question 2

Give at least one example of a policy about the correct use of a browser or search engine.

Summary

- Research involves establishing facts. At the end of your research, the facts may lead to a conclusion or course of action.
- Before you begin researching, make sure you understand the purpose, audience and presentation requirements of the task.
- Research objectives describe exactly what the research is trying to achieve or what needs to be achieved.
- Information found on the internet needs to be from a recognised and trusted source or supported by credible evidence.
- Preparing a research plan means your research will be structured and can save you time.
- To find the most relevant and useful websites, use key search terms.
- There may be a range of policies and procedures in your organisation related to searching and using information from the internet.
- The type of applications and search engines used will depend on existing platforms, compatibility with other applications and the available resources.
- A browser is a type of software that allows the computer to access the internet. Each browser has an address bar where you enter the web address or URL for the website you want.
- A search engine is a website that will take you to websites that match your key search terms.
- Choose a software program that is best suited for the type of presentation required for your research task.

Learning Checkpoint 1

Plan research

Part A

1. Draw a line to match each term about research methods to its description.

- | | |
|----------------------|---|
| » Key search terms | » A statement that describes exactly what the research is trying to achieve. |
| » Search engine | » Software that allows the computer to access the internet and find the URL in the address bar. |
| » Research objective | » The information is current and has been reviewed/updated recently. |
| » Browser | » A program that searches and identifies the websites that match your key search terms. |
| » Credible source | » The words that find the most relevant and useful websites. |

2. Which of the following statements relate to functions of different software applications? Tick all that apply.

- Most organisations require staff to use Facebook as their preferred search engine.
- The address bar in the browser is used to enter the web address or key search terms.
- A common software used for presentations is Microsoft Excel.
- Community groups often use .net or .org in their URL
- The applications and search engines used by a business will differ according to their needs and resources.

3. A Privacy policy would outline if personal information obtained from the internet can be used. » True » False

4. A procedure will ensure that staff only use specific applications when searching for information on the internet. » True » False

Part B

Read the case study and answer the questions that follow.

Case study

Donna works in the office with three other staff in a business that specialises in injury and accident claims.

Many of their clients are seeking legal advice after having been involved in an accident. It is important that the details of the accident are recorded accurately. The information collected from the clients can make the difference between an insurance claim being successful or not.

Some of the documents used to record information are old and do not reflect the type of information that is needed to be recorded for a claim. The office manager Mikael has asked Donna to research other examples of suitable records that will better capture the details of an accident. He requires three examples of documents along with a small report outlining the benefits of each option. This will need to be presented to the manager at a meeting set for one weeks' time.

Donna decides she will prepare a research plan for searching the information she needs.

1. Complete the research plan document below with information about Donna's research.

Research methods	Details
Research Task: <ul style="list-style-type: none"> ▪ Purpose ▪ Audience ▪ Presentation 	
Objectives	
Scope of research	
Key search terms	
Applications: <ul style="list-style-type: none"> ▪ Search engine ▪ Browser ▪ Other applications 	
Potential sources of information	
Related policies and procedures	

2. Write three tips you could give Donna about refining her search terms.

3. Identify two things Donna should look for to confirm she is looking at a credible website.



Topic 2 | Conduct research

- 2A Access the internet and begin the search
- 2B Collect information according to research plan
- 2C Use help functions to overcome issues

2A Access the internet and begin the search

The research plan you developed as a part of your planning, has the applications you will need and a list of key search terms you can use to find what you need on the internet.

For the purpose of this unit we will refer to instruction for a PC. So now you can get started.

Get online

Going online means getting on the web.

The term 'web' is used to describe internet. You can image it to be a huge network of computers that connects people with each other and with information from thousands of websites.

To begin, turn on the power on your device. The location of the power button will vary according to the device you are using such as a desktop computer, a laptop computer or a tablet. It may take a few minutes for the computer to load all of the applications and be ready to begin your search.

Find the website

Keep to your research plan and try not to get distracted.

A website is a collection of linked web pages that share a unique domain name. Each web page of a website allows you to move from one page of the website to another.

To access a website, type its domain name in your browser address bar, and the browser will display the website's main web page, or homepage (casually referred as "the home"). As discussed in the last topic the browser you need to use will probably already be loaded onto your computer and this is the program your organisation wants you to use.

When you click on the icon of the browser, it will open up and the address bar will appear.



Sometimes a computer has been set up to open automatically to the browser when the power is turned on.

You can find the website or potential information you need by:

- typing in a URL if you know the address
- click on a hyperlink (a link that will send you straight to another website) provided in a document or an email.
- type in the key search terms.

A web address always begins with `http://` or `https://`. These letters indicate the rules computers use to send information around the web. The letter 's' indicates that the website is authentic (it is an actual web address) and secure. Many websites that require login details or store financial or personal information use the 's' to reassure users that the site is reliable.

Sometimes you will see 'www' in the web address. These letters mean world wide web. All websites have this but sometimes its hidden in the URL.

As you type in your address or search terms, the browser will use a predictive search function based on your key search terms. This will appear as suggestions in the drop down menu as you type in the key search terms.



Search results

Your key search terms will get thousands of results.

The result pages displayed by the search engine, are referred to as Search engine results page or SERP.

As discussed in topic 1, you may need to refine your search terms or use Boolean connecting words to reduce or modify your search results.

The search engines will provide you with your results that most closely match and are relevant to your search words. The results from your search will be set out in pages with lists of suggested web pages. As you move down the list and into the next page, the results become less relevant to your search terms.



Read the details of each result carefully as some may be on the first page because the company paid for them to appear high on your list based on your search terms. One technique used to increase the 'hits' in a search is search engine optimization (SEO).

You can find read more about how Google search works on this website: aspirelr.link/google-search

Explore the website

When you land on the web page, move your cursor to explore the homepage. You can move between pages by clicking on the different links. A link may be an underlined word or a word in a different colour that takes you to other web pages for more information. When you hover your cursor over a weblink, your cursor changes from an arrow pointer to a hand symbol.

Sometimes a link may take you to more information on the same website or it can take you to another website.

Example

Researching a course

Sally is looking forward to starting her research. She works as an administration assistant in an office and works closely with the owner of a manufacturing business. The owner has been encouraging her to learn new skills and in the short time she has been employed, she has been given a number of banking and accounting tasks that she is responsible for. The owner has suggested she should formalise her new skills by doing some study at a TAFE in bookkeeping.

Sally used her work computer to investigate courses offered in her state. She decided that she needed to know the length of the course and its location as a starting point for her research. After using a variety of search terms, Sally found several websites with the information she needed. A Certificate IV in Accounting and Bookkeeping was offered at several locations including a TAFE not far from her home and was 18 months to complete. Sally recorded the details and prepared a short list to discuss with the owner.

Practice Task 4

Question 1

Which of the following statements relate to conducting research? Tick all that apply.

- The web is a huge network connecting people and information.
- The power button is located on the top of the device.
- Access a website by typing in the domain name into the browser address bar.
- A predictive search function allows you to guess the website name.
- The results from a search become less relevant as you go down the list.

Question 2

The result pages displayed by the search engine, are referred to as SERP. » True » False

Question 3

A secure and reliable website will include the letter 's' in the web address, such as https://. » True » False

2B Collect information according to research plan

Be prepared to keep a record of the URLs or websites you visit.

Refer to the potential websites listed in the research plan to begin collecting information. Keep a record of each website so you can see what information was provided by each website.

- Remember the information you gathered from each website so you can cite the source of information
- Use the URL address when referencing the source of your information.

This will help you later when you document your findings into a report or other method.

There also may be a situation when a colleague wants to use the information you have collected. It will be easier for them if they have a summary of your research instead of having to find the information from scratch all over again.

Make sure you refer to the policies and procedures for referencing information accessed from the internet and written by someone else. This includes the copyright and IP policies and procedures.

There are several ways you can keep a record of the information you have obtained from each of the websites you have visited.

<p>Cut and paste the URL address from the address bar into a separate document such as your research plan.</p>	<ul style="list-style-type: none"> • Highlight the address in the address bar. Right click on your mouse and cut or copy the address. Right click again to paste the address into a document.
<p>Drag the web address to your desktop on your computer or tablet.</p>	<ul style="list-style-type: none"> • Open the web page you want to save. • Clicking the middle button on the top-right of the screen to restore down/maximise to reduce the size of the screen so you can see the desktop. • Click on the URL in the web address bar so it's all highlighted. Click and drag the link to your desktop. • Note: if you share the use of a computer or tablet with other people, it may not be good practice to use the desktop to save your own work. Save any documents to the c: drive or other folder.

Save a link to a website using your browser.

- To save a web address into your browser, look for the star in the address bar. It may have a different look according to what browser you are using. This is a bookmark that is used to save a website into a folder for future use.
- To create a bookmark, click on the star and it will give you some options to save the website to a folder. You will be able to find the website by going to the bookmark folder and clicking on the address.

If you do lose the details of a website and want to find it again, your search engine will keep a record of the websites you have recently visited. This is in the history tab, found in a dropdown box near the search bar.

Organising information

Organising the information makes the documenting and reporting process easier.

One way of organising the information you have collected is to use a basic table, spreadsheet or template to record the relevant details of each website. An example is provided in the table below but you can easily adapt this to suit the complexity of your research and the number of websites you visited as a part of the research plan.

Example

Collecting information from websites

Sally wants to find VET courses to study on bookkeeping and accounting.

Search terms	Website URL	Information provided
Bookkeeping courses in Melbourne	training.com.au/ps/bookkeeping-courses-in-melbourne tafecourses.com.au/courses/bookkeeping/melbourne	Provides a list of several bookkeeping courses. Is a commercial company advertising a list of places to study?

Search terms	Website URL	Information provided
Training.gov.au	myskills.gov.au www.myskills.gov.au/Courses/Search?keywords=bookkeeping&distance=25	Provides details of names of courses within 25kms of my city. Provides information on associated costs, course duration and % of graduates who are employed or have continued with further study.
Course code FNS40217	training.gov.au/Training/Details/FNS40217	Details of the units in the course. Description of the qualification.

Practice Task 5

Question 1

Give two reasons why it is recommended to keep a record of the websites you visited during your search.

Question 2

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

- a) Keep a record of a URL by pasting the address from the address bar into your research plan. » Yes » No
- b) The URL address can be dragged to your desktop on your computer. » Yes » No
- c) Use the desktop to save your work as this is secure and no-one can access your documents. » Yes » No
- d) A link to a website can be saved using the bookmarking function. » Yes » No
- e) The history function on a computer will keep a list of all the websites you have visited for the duration of your research. » Yes » No

2C Use help functions to overcome issues

There are several ways to find a solution to your problem.

Common issues that you might need help related to researching on the internet include:

- being unable to find the information on a website
- the search results are not locating the right detail of information
- instructions for locating information are not clear
- you cannot find where you saved your research plan document
- you have lost internet connection
- the browser needs loading onto your computer
- you cannot login to your computer
- passwords or usernames are out of date and require renewing

Ways to get help

You can get general helpful information on an issue by typing in the keyword or phrase into the search box in the browser. This may be a phrased as a question or key words or the error message that is being displayed. In the same way you have been searching for information, you are searching for the answer to your issue.

When you type in the error message you can find websites with comments and suggestions from people who have had the same problem and have found a solution. Forums are useful sites to find comments from others who have experienced the same issues. Some popular forums relate to particular software programs such as Adobe.

Many websites provide help and support related to the use of their website including finding the information you need. Go to the home page and look for:

- a live chat function that will appear and where you can post a question to a representative from the company.
- frequently asked questions (FAQs)
- the contact page where you can send your query via email or post to their social media site.

If you can't find what you are looking for, you can go to the site map. A site map is an organised list or a flow chart showing you the layout of the web site. If you find it difficult to navigate a website, use the site map to go to the page you need.

When searching for help with a query or problem, consider searching for a video. You can use the popular video program YouTube by typing this into your browser, then searching within the search bar of YouTube to find a suitable video. Some people find the information presented in a video easier to understand. You can pause the video when you need to take notes or do what they are suggesting in real time.

Many libraries offer help in researching for information. This may be a free online course, or if you can work in a library the staff may be able to help you. Search for public libraries in your local area, State of Territory (.gov), as well as Universities and other education sites (.edu).

Browser support or help

Most of the larger browser companies have support and help pages. Many of the common issues are related to problems with using their applications and less about researching. However, you will need to use these applications for your research plan and also for documenting and presenting your research.

Search for these sites using the help or support in your search words.

Here are some examples:

Google Chrome Help	support.google.com/chrome/?p=help&ctx=menu#topic=9796470
Google Help	support.google.com/?hl=en
Microsoft Help community	answers.microsoft.com/en-us
Internet Explorer Support	support.microsoft.com/en-us Windows help & learning - Microsoft Support
Safari Support	support.apple.com/en-au/safari
Firefox Support	support.mozilla.org/en-US

Help from colleagues or IT staff

Follow the procedures set by your organisation when having issues with researching the internet.

You should try to solve an issue yourself or you can ask for some advice from a colleague or IT support person in your workplace. Depending on the size of the business where you work there may be a designated support team to help solve IT issues. There may be procedures you need to follow such as emailing your request for help or making an appointment for a person to come to your desk and assist you.

Another resource you can refer to is training materials. Training courses are available for researching on the internet and provide a comprehensive set of instructions that are worth keeping for future reference. This may have been on online course and you can go back and refresh your memory.

Taking screenshots

A screenshot can be used to communicate the issue you are having to someone else.

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

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

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



Example

Help using software applications

Mohana works as a personal assistant to a manager in a large organisation. She has become the person in the office who prepares PowerPoint presentations based on content and information provided to her by her manager. Mohana has been provided with the research findings on the features and benefits of a new website design. This includes lots of images and screenshots of the proposed layout for the new company website.

Mohana often refers to the help functions to assist her in making the most of the software and as a way of increasing her skills. If she doesn't know what an icon can do, she hovers over the icon with her mouse and reads the bubble displayed. A colleague gave her some instructions she was given from some training. Mohana keeps these in a help folder on her desktop.

A couple of times she has not been able to find the information herself, and has needed to ask her colleague Lauren for help. Lauren is always happy offer advice and suggest new ideas for enhancing the presentation.

Practice Task 6

Question 1

Which of the following statements relate to using help and support functions?
Tick all that apply.

- Use the search bar in the browser of the website
- Describe your issues in full by typing them into a search browser
- Go to the home page and find the contact or FAQs
- Stop searching and leave it until tomorrow
- Go to the browser company website support page

Question 2

Suggest a solution to the problem of not being able to find the information you want on a website.

Summary

- Use your research plan to guide the search for information.
- To begin searching you will need to turn on the power of your device and give it a few minutes to 'warm up'.
- To access a website, type its domain name in your browser address bar.
- A web address always begins with http:// or https://. These letters indicate the rules computers use to send information around the web.
- The browser will use a predictive search function based on your key search terms.
- A search engine will provide you with your results that most closely match and are relevant to your search words.
- Explore the homepage of a website by moving your cursor around. You can move between pages by clicking on the different links.
- Keep a record of each useful website you visit so you can record what information was provided by each website.
- You can get helpful information on an issue by typing in the keyword or phrase into the search box in the browser.
- Many websites provide help and support related to the use of their website.

Learning Checkpoint 2

Conduct research

Read the case study and answer the questions that follow.

Case study

Ahmed has spent some time in discussion with the rest of his team on a research plan. Ahmed works with a small team in the human resources department of a not for profit company. There have been a number of issues with the online timesheets used by staff to record the days and hours of their work. Some staff have been underpaid and some staff have not had their leave recorded as it should have.

Ahmed has the task of researching some other software applications that they can use to replace the older system that no longer suits the needs of the company. Ahmed and the team have decided that two weeks should be enough time for him to search for the information her needs and report back with a summary of his recommendations.

1. Number each step from 1 to 6 in the order Ahmed should follow to conduct his research.

- Enter the key search terms listed in the research plan
- Keep a record of the URL and the information provided by each website
- Turn on the computer
- Open a browser
- Access the internet using the preferred search engine
- Search for the relevant information

2. Ahmed is having trouble finding the information he needs. The results from his search do not have details on the benefits and prices of the various software he is investigating.

Suggest two things Ahmed can do to get help.

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

- | | | |
|---|-------|------|
| a) A copyright policy is an example related to referencing information from the internet. | » Yes | » No |
| b) Bookmarking means saving a website to a folder so you can find it again. | » Yes | » No |
| c) A record of the useful websites you visit can be used to share with others. | » Yes | » No |
| d) Avoid using a link in a website, as it can take you to an unreliable webpage | » Yes | » No |
| e) Use the contacts on a website to send a query using email or a social media post. | » Yes | » No |



Topic 3 | Present research

- 3A Document collected information
- 3B Deliver document on research

3A Document collected information

Information needs to be organised and presented in a format that is meaningful to others.

When you are deciding how to organise information, refer back to the requirements of the task. This may involve asking the following questions.

- What is the purpose of the information and how will it be used?
- Who will use this information? Is the information for internal staff or external clients, a senior or junior person, someone with lots of knowledge on the topic or only a little?
- What procedures or style requirements will need to be followed for its presentation or format?
- What format will it be required; a soft and/or hard copy?

Formatting information

The way information is to be distributed will affect the way it is formatted.

The type of information you are organising may need to be prepared or presented in a particular way for its purpose. For example, it may need to be:

- prepared so it can be attached to an email or loaded onto the company's website
- presented as a bound booklet and formatted using a desktop publishing program
- prepared as electronic presentation of slides for a conference or meeting
- required as a table or graph to show numbers and other data.

You will need to choose the most appropriate software application to collate and organise your information. You may have already thought about what you need and recorded this in your research plan.

Some examples of software applications used to document research might include one or more of the following.

Reports and letters

Reports and letters generally use a word processing application such as Microsoft Word. They might contain a table of contents, chapter numbers, headers and footers, or symbols to help readers locate information quickly.

Spreadsheets

Spreadsheets are an appropriate way to present numbers such as financial or sales data. The functions of a spreadsheet allow for data to be presented in a way that it is easy to analyse. An example is Microsoft Excel.

Visual diagrams

Graphics such as shapes, charts, diagrams, pictures and tables are a useful for interpreting written material or numbers. Make sure they are clearly labelled or have a legend (a key to what the colours or symbols mean) to make it easy to understand them. They can be imported into an Excel spreadsheet or found in Word.

Databases

Databases organise information about customers and sales records in a logical, consistent format. Some databases include Microsoft Access and Tracker.

Organise the information

Set out the information you have gathered in a logical order.

There are many ways to arrange the information depending on the format and requirements of the task. Here is a suggestion of a way to set out your research report.

1	What was the objective?	Restate the objective of the search.
2	How did you search for information?	Provide a brief description of the methods you used to find information including: <ul style="list-style-type: none"> ▪ websites you used to find information ▪ strategies you used to identify information such as the search terms, scope, etc. ▪ a brief description of the way the information is organised for analysis such as a table, spreadsheet etc.
3	What information did you find?	Provide a brief description of your search findings, such as: <ul style="list-style-type: none"> ▪ the number of resources you identified ▪ the type of resources you identified such as commercial sites, government information, industry peak bodies, etc.

4	What were the findings of your analysis?	<p>Provide a description your findings (directly related to the objectives of the task), such as:</p> <ul style="list-style-type: none"> ▪ Common findings ▪ Conflicting information ▪ Amount and quality of information available such as very little information on the subject ▪ An argument that supports your recommendation. For example, in a comparison between products you might mention the features and benefits of one brand/product over another. ▪ If the results of your search are unclear, state this in your conclusion.
----------	---	--

As a guide, most of your discussion should address the final two questions. For example, if you are documenting your recommendations in a two-page report, half a page could be used to answer questions 1 and 2, with the remaining one-and-a-half pages dedicated to answering questions 3 and 4.

Prepare data and information

Information needs to be checked for spelling, grammar, consistency and style.

Although you might prepare information very carefully, there will probably still be some mistakes. It is better to find these before you submit your work or share it with others. Edit and proofread work by closely reading it yourself before getting someone else to read it. Editing identifies the errors in grammar, punctuation and spelling so they can be corrected.

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

Requirements of a style guide

The requirements for documenting information collected required for one may not suit another; for example, a law firm's requirements would be different from that of a sports equipment retailer.

Ask if your organisations use a style guide. A style guide will provide details of the way the organisation wants its documents or reports or other information to be structured. You may need to confirm with a supervisor to make sure you are following correct procedures for documenting your research.

Examples of guidelines in a style guide include:

- The use of templates with a pre-set style
- When to include the organisation's logo and corporate colours
- How to reference someone else's work
- Including version control or file path in the footer

Example

Using the style guide

Jenni has recently been employed as a marketing assistant for an ad agency called Impact. The company often uses presentations to communicate to clients. Jenni has been asked to prepare the information she has collected using a template for a meeting, but she will need to change the colour scheme to reflect the corporate colours of the client.

Here is a sample of the design requirements contained in the template that Jenni will use:

- The company logo should appear on the top left.
- The date should appear on the bottom right.
- One heading should be used per slide.
- All headings to be Arial and all text to be Times New Roman.
- All headings to be bold and in font size 24.
- All body text should be in font size 16.
- There should be approximately three bullet points per slide.
- Use square bullet points.
- Images must reflect and promote the content.

Reference your work

Your organisation may require a reference or list of the websites you visited.

During your search you will have kept a list of the websites used and the information provided from each site. This may be in a bookmarks folder or in a typed document. This information can be used as a reference. Remember to acknowledge information that someone else wrote.

There are several ways to list your references. There is reference management software, such as Endnote, to organise your sources. If you don't have reference management software, a spreadsheet such as Microsoft Excel can be used to record and save the details of the websites. If there are no requirements to do a formal reference list, make sure you keep so you can identify the information that came from each website you used if you were asked.

Printing a hard copy

If you need to print a hard copy, check what is required such as double-sided (that is, using both sides of the paper), using coloured paper, stapling and the required number of copies etc. If your document is being used as a presentation, you may need to print out handouts, speaker notes or outlines for the speaker or audience.

Practice Task 7

Question 1

Which of the following statements relate to formatting research information? Tick all that apply.

- The format of a report will depend on how many words are used.
- Slides are a useful way to share data and written words to a group.
- Word processing software is a suitable format for a documented report.
- Personal photos add interest to a report.
- Style guides are procedures for the use of the logo, colours and other formatting details.

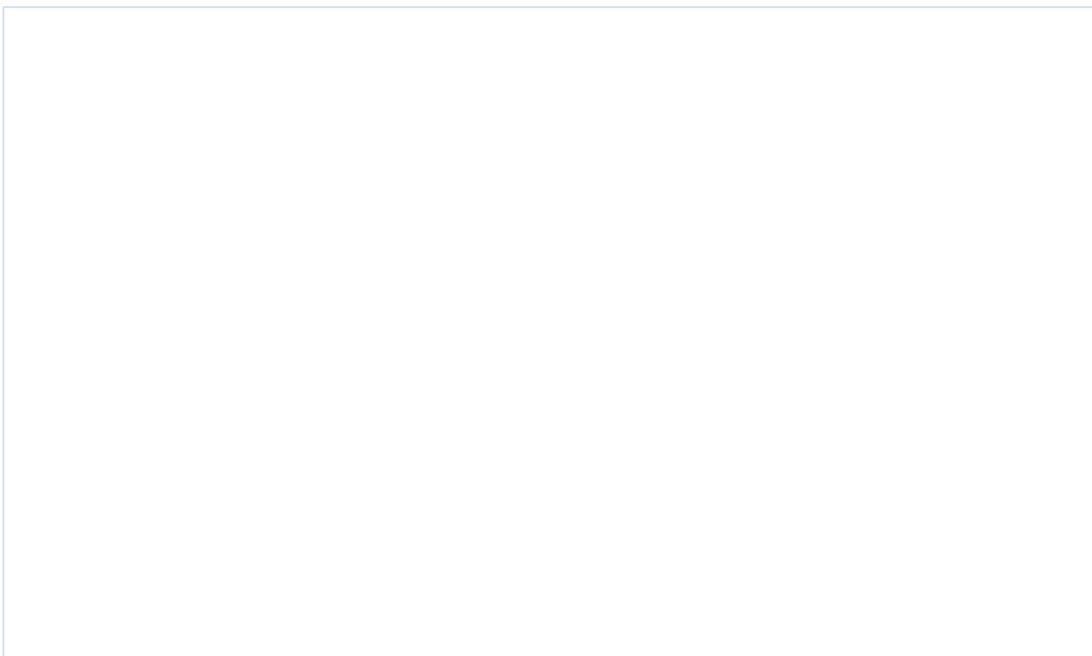
Question 2

Suggest one reason why it is a good idea to edit your research report before submitting it.



Question 3

Why should you keep a reference list of your web searches?



3B Deliver document on research

Once you have proofread a final copy of your research you are ready to deliver it.

Confirm the delivery date with a supervisor if necessary and prepare your research to distribute to others. You may only be provided the research report to one person or you may be producing several copies or sending it via email to a group of people. If you are verbally explaining information to others, ask them when they would like the material presented. For example, it may be part of a regular staff meeting or a special meeting with guests outside of the business.

Deliver the report to others

Depending on the task you have been given, there may be instructions on how the other people will receive a copy of your work. Some people may be at a different location or be clients or other people outside of the business. Here are some examples:

Ways to share your information:

- Sending hard copy documents by post
- Using a courier to deliver hard copy confidential documents
- Hand delivering a record to a colleague or supervisor
- Delivering a verbal presentation to a group
- Sharing a link to a cloud-based site, such as Dropbox, SharePoint or Google Drive
- Sending an email with a document attached

Sending information via email

Email can be used to send confidential material to specific people.

Always check the recipient/s to whom you are sending the email to and confirm email addresses with the records to ensure they are accurate. You will need to refer to the IT or email usage policy if you are unsure of what to do.

Confidential emails should be marked as such in the subject line or as a heading in the body of the email. Businesses include a disclaimer at the end of the body of the email to inform the user of their obligations for deleting the information if it was sent incorrectly to them. You can also add a Request to Delivery Receipt when you send an email to confirm that the person received your information.

The following table explains the structure of an email.

Subject line	A subject line is a short statement about the purpose or name of the information.
Greeting	A greeting is the salutation used to greet the recipient. Standard business emails use the following rules: <ul style="list-style-type: none"> For unknown recipients or for formal emails, use "Good morning/ afternoon Mrs Jones", "Dear Mrs Jones" For informal or internal emails or where you have a positive relationship with the recipient, use "Hello Peter", "Hi Peter" or Morning/Afternoon Peter"
Body of text	The body of text is the key content of the email details of what needs to be communicated and any follow-up or action that must be taken by the recipient. <ul style="list-style-type: none"> Be clear, concise and courteous. Check that no part of your email could be misunderstood and use language that the recipient will understand. Use bolded words, underline or colours to highlight key points and actions that need to be taken. Use small paragraphs of one-three sentences maximum or bullets and number lists.
Attachments	There are three important considerations for an attachment: <ul style="list-style-type: none"> Attachment size - Multiple/large attachments can slow down the recipient's computer or overfill their inbox. To avoid this issue, reduce the file size by compressing files or creating a zip file or post pictures/videos to an online site or virtual storage like Dropbox or Google Docs. Attachment format - Consider the format of the attachment that you are sending and whether the recipient will have the appropriate software to open it. To avoid this issue, convert your file and send it in PDF format. PDF's are not software specific and PDF Readers are free to download.
Ending/ Farewell	The final closing or farewell. Use "Kind regards", "Regards" or "Thank you" for formal and informal emails followed by a blank space and your full name on the next line below.

Signature	<p>All email programs whether they are installed packages like Outlook or online services like Gmail will include the ability to create a signature for your email.</p> <p>An email signature will usually be dictated by the organisational requirements set out in a style guide.</p> <p>A standard email signature will include:</p> <ul style="list-style-type: none">▪ Your full name▪ Job title▪ Mobile, business numbers▪ Organisational name, address and website▪ A company logo
Disclaimer	<p>A disclaimer is a standard statement describing privacy, confidentiality and environmental requirements relating to the email. It should be included in all business emails.</p>

Example

Sample email disclaimer statement

This e-mail is intended for the use of the addressee only and may contain confidential information. If you are not the intended recipient, you are hereby notified that any use or dissemination of this communication is strictly prohibited. The sender disclaims liability for any errors, omissions, viruses, loss and/or damages arising from using, opening or transmitting this email. If you receive this transmission in error, please notify Aspire Learning Resources immediately then delete this email.

Practice Task 8

Question 1

For each of the following examples of research reports, suggest a delivery method for each:

» Word document to a group of people in various locations across Australia

» Set of slides in a presentation format

» Confidential or sensitive report written as a Word document

Summary

- Refer back to the task instructions when making decisions on the organisation and formatting of your research report.
- Use your research plan to see what software application and equipment you will need to document the information.
- Set out the document in a logical order that will make it easy for the audience to read and understand.
- Edit and proofread your draft for spelling and grammar before getting someone else to read it.
- Include a list of references for future reference and to assist you to find the website again.
- Use a style guide for rules on the way the organisation wants its documents or reports or other information to be structured.
- Follow the instructions on how other people will receive a copy of your work such as hand delivered, via email or accessed from a sharing site.
- Email is an efficient way to send information to others including a group of people.

Learning Checkpoint 3

Present research

Donna works in the office with three other staff in a business that specialises in injury and accident claims. This is part of her research plan:

Research methods	Details
Research Task: <ul style="list-style-type: none"> ▪ Purpose ▪ Audience ▪ Presentation 	Task: Search the internet to find examples of documents that will provide a detailed record of client accident. <ul style="list-style-type: none"> ▪ Purpose: to collect more relevant information from clients ▪ Audience: Donna's manager - Mikael ▪ Presentation: Three documents and a report for discussion in a meeting in one week's time.

Donna has collected the three examples of documents and is ready to prepare the information for her meeting with her manager.

1. Which of the following statements relate to the way Donna should organise her report? Tick all that apply.

- Most of the report should be dedicated to answering the research objectives.
- The report should include an outline her research plan such as the scope of the search.
- She should provide a list of the websites where she sourced the information.
- She should recommend a document and describe how it will meet the objectives.
- The report should include an outline of how hard she had to work to meet the deadline.

2. Suggest two things Donna should consider about formatting her report.

3. List two ways Donna can deliver her report to her manager.



