BSB 7.0

BSBTEC201

USE BUSINESS SOFTWARE APPLICATIONS

Aspire Learning Resources

BSBTEC201

Use business software applications

Release 1

Learner Guide

Aspire Version 1.2

Aspire Learning Resources

Version	Release date	Modification
Release 1, version 1.1	October 2020	First release
Release 1, version 1.2	May 2021	New content added to Topics 1, 2 and 3. Minor continuous improvement corrections.

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.

BSBTEC201 Use business software applications, Release 1

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Before you begin

This Learner Guide is based on the unit of competency *BSBTEC201 Use business software applications*, 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	▪ Recognises and interprets information from familiar sources to determine job role and task requirements
Writing	▪ Produces and amends files to meet task and organisational requirements ▪ Completes required documentation using organisational formats
Oral Communication	▪ Uses specific and relevant language to refer faults to others
Technology	▪ Uses technology safely, when gathering, storing, and accessing data ▪ Understands purposes, specific functions and key features of common digital applications ▪ Operates digital applications to complete routine tasks using some basic troubleshooting strategies, where required

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 to use technology	1A	Identify task purpose, audience, format and presentation	❑ Confident ❑ Basic understanding ❑ Not confident
	1B	Select relevant technology and software applications	❑ Confident ❑ Basic understanding ❑ Not confident
	1C	Make adjustments to suit own ergonomic requirements	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 2: Input and process information or data	2A	Identify and open applications	❑ Confident ❑ Basic understanding ❑ Not confident
	2B	Enter, check and format information or data	❑ Confident ❑ Basic understanding ❑ Not confident
	2C	Use relevant help functions	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 3: Finalise and store document	3A	Review, edit and prepare final information or data for storage	❑ Confident ❑ Basic understanding ❑ Not confident
	3B	Name and store document and exit application	❑ Confident ❑ Basic understanding ❑ Not confident

Topic 1 | Select and prepare to use technology

1A Identify task purpose, audience, format and presentation

1B Select relevant technology and software applications

1C Make adjustments to suit own ergonomic requirements

1A Identify task purpose, audience, format and presentation

Before you start a task, make sure you know the purpose, audience and required format.

Completing tasks correctly and efficiently starts with good preparation. Before you begin any task that involves the use of technology and software, ask yourself these questions:

- What is the purpose of the task? What is it supposed to achieve?
- Who is the audience? Who will be reading or using the finished work?
- How should it be formatted or presented? How should the finished work look?

If you are unsure about any of these things, check with your supervisor or the person directing you to do the work, so you are clear on what is expected.

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

Purpose
The purpose of a business document influences the type of document you produce. Clarify the purpose of the document before you begin. This will help you determine how to plan and design it. For example, if the document's purpose is to provide numerical data on sales figures, you may have to collect the information and collate this into the spreadsheet.
Audience
You need to be aware of your audience. Knowing who the document is intended for will help you decide the amount of information and detail it should contain based on their prior knowledge and experience. For example, a senior management team may need more details compared to operational staff. It will also help you decide how best to present the information. For example, a set of slides may be a good way to present information to a work team.
Format
Format refers to the appearance and layout . Formatting includes the use of headings, font styles and sizes, headers and footers, use of colour and images that affect the style and appearance of a document. For example, the format used in an email to staff will be different to the format used in a business letter.
Presentation requirements
Presentation depends on the type of document, the content of the document and the intended audience. For example, an annual report may require a presentation using images, charts and tables. This will be different to the way invoices or letters are presented.

Organisational requirements for document type and style

Most organisations have requirements for the style in which documents should be presented.

To promote an organisation's corporate image and consistently provide information that is easy to access and understand, organisations often use templates and style guides.

- A template is a document that is pre-formatted to suit a particular purpose. The template is used as the base from which to start a new document.
- A style guide provides specifications and design details for the formatting and presentation of documents. For example, the position and use of the company's logo or corporate colours.

Templates can be formatted to any style an organisation prefers. They ensure that certain types of documents are always produced in the same style such as the layout of an email or promotional materials sent to customers.

Templates commonly exist for the following types of documents:

- Emails
- Presentations
- A collection of data
- Meeting agendas
- Standardised letters
- Invoices

Templates used by organisations can be created in-house or accessed online. Microsoft provides a range of templates online for Word, PowerPoint and Excel, which means you need to be connected to the internet to access them.

Using templates can be useful if you are not sure how to set up a document, or if you want to alter the layout of existing documents.

If your organisation has existing templates and a style guide, make sure you know where they are stored.

Types of spreadsheets

When planning your spreadsheet, it is important to know what it is going to be used for and who is going to use it.

Spreadsheets are created for many reasons, including:

- accounting and calculations
- tracking spending
- budgeting

- assisting with data exports from one system to another
- creating quotes, receipts and invoices
- generating reports and charts.

The purpose of a spreadsheet varies and will influence the type of document you produce and the data you use to populate the spreadsheet. Make sure you understand the purpose of the spreadsheet before you begin to determine the way it is planned and designed. For example, if the document's purpose is to provide numbers of sales figures, you may have to collect the information and then collate it into the spreadsheet.

Types of presentations

A presentation can be used in many ways to suit a purpose and audience. It should hold the audience's attention and ensure that your information is easy to understand.

Here are several different ways a presentation may be used.

Face to face
Presenting information face to face to an audience, such as at a seminar or a staff meeting.
Inviting an external speaker
Engaging a specialist speaker/demonstrator for all or some aspects of the presentation.
Self-running
Choosing a 'self-running' mode, such as a looped video that runs continuously on a TV monitor at an exhibition stand.
Self-paced
A presentation for staff to use themselves, such as at a conference, in a training session, or in their own time. It may include activities to assess their understanding of the tasks or material.
Online
Setting up the presentation on the internet or the organisation's intranet. This allows for tracking and ensuring information has been accessed by staff or others wherever they are located.

Document types

Word processed documents are the most common type of document created and used in organisations.

Word processed documents include:	
▪ memos sharing information	▪ meeting minutes
▪ meetings agendas	▪ briefing papers
▪ annual reports or research reports	▪ letters to customers or clients
▪ flyers for promotion	▪ labels for parcels
▪ standard form letters	▪ notes to accompany a presentation.

Meeting agendas and minutes

An agenda is a list of items to be covered in a meeting, while minutes are a written record of what occurred in the meeting.

A meeting agenda identifies the topics to be discussed during the meeting and helps participants follow the proceedings.

When creating an agenda, check if the organisation has an agenda template. If it does not, Word has agenda templates that you can use. To access these, select the **File** tab, choose **New**, and search for 'Agenda'.

Minutes are made to record a list of participants and the details of all issues discussed at the meeting. They are written at the time of the meeting and are often placed on a server (a computer network) where appropriate employees can access them. If you have the task of recording the minutes of a meeting, check if there is an existing meeting minutes template.

If there is not, you can locate a template for meeting minutes in Word by selecting the **File** tab, choosing **New**, and searching for 'Minutes'.

Example

Meeting minutes

Minutes of the monthly meeting of the Equipment Committee of Engineering Forces on Wednesday 18 April at 2.00 pm at 237 Fraser Street, Belton

Present

G. Jones (Chair), L. Meadows, D. Juntovski, J. Crance, A. Andrews, S. Tran, H. Roberts

Apologies

J. Rostova

Minutes of the previous meeting

The minutes of the previous meeting were confirmed and adopted as an accurate record.

Correspondence

A letter was received from Century Computers requesting two computers and a modem.

A letter was sent to the Royale Receptions Centre requesting information on facilities.

Reports

G. Jones reported that the consultant from Eagle Consultancy had completed a report on the computer needs of the company. The findings will be summarised and distributed to all staff members.

Actions:

- H. Roberts to prepare a summary and distribute to staff within a week.
- J. Crance presented the financial report on spending for March. Major items were the coffee machine and a filing cabinet. The report was accepted.
- A report from the Occupational Health and Safety Officer was tabled and discussion deferred to the next meeting.

Other business

D. Juntovski reported that the printer had consistently broken down during the previous three weeks and requested that the cost of getting a new printer be investigated. The meeting discussed the possibility of obtaining a second-hand printer.

Action: A. Andrews will obtain costs for a new printer and a second-hand printer from a range of suppliers and report at the next meeting.

Next meeting

The next meeting will take place on Friday 24 April at 2 pm.

Reports

A report is a document that outlines information about the activity in an organisation.

A report may be written about the progress of an existing project, the feasibility of a future project or to summarise the findings of research that has been undertaken. Writing a report is a way of communicating organisational information to a wide audience.

Reports often include many details that need to be collected from multiple people in an organisation. For example, if multiple teams are working on one project, their progress may need to be recorded in one report. To access a variety of report templates, open Word, select the **File** tab, select **New** and search for 'Report'.

Notices

The purpose of a notice is to attract people's attention and interest them in the notice's subject. It could include a message to the cleaners to turn off the lights before they leave or a reminder about an upcoming event or activity.

Letters

Organisations write business letters to send information to internal and external clients.

Many organisations have printed letterhead paper, and the information is word processed before a hard copy is printed. An organisation may choose to design a letter template that suits its organisational style requirements or use one available from word processing software.

Many organisations have standard letters for different types of communication, including letters that are sent out regularly. Examples of standard letters include:

- acknowledgement letters
- overdue payment letters
- customer reward letters.

Standard letters can be saved as a template and accessed by selecting the **File** tab, **New** and **Custom**.

Example

Letter

Near East Trading Co
131 Victory Road
Kensington TAS 7725
Telephone: (03) 3275 9123

Ms Peta Jones
Manager
Expo Furniture
28 Hopper Street
Cairns QLD 4870

19 February 2020

Dear Peta,

We are pleased to announce that our 'Summer Selection' is currently being finalised. A copy of the catalogue will be forwarded to you as soon as it is available.

At the beginning of March our sales representative will start showing the range to all our clients. You will be contacted personally to arrange an appointment to view the 'Summer Selection'.

We hope you will be as impressed as we are with the new range. Please contact us if you require any further information.

Regards,

Sophie Wilson,
Brand Manager

Near East Trading Co

Practice Task 1

Question 1

Briefly explain why it is important to:

a) clearly understand the purpose of a document you are planning to write

b) know who the intended audience of a document is

c) know the presentation requirements.

Question 2

You have been given some meeting topics and asked to create a meeting agenda. What do you do if you are not sure what format to use for the agenda? Tick all that apply.

- ◯ Choose a Word agenda format that you think appropriate.
- ◯ Clarify with your supervisor what format to use.
- ◯ Create two agendas using different formats and ask the supervisor which one they prefer.
- ◯ Create your own agenda format.

1B Select relevant technology and software applications

Organisations use a range of technology and software applications to complete tasks.

All office environments use a variety of devices and software applications to complete day-to-day activities. When you work in these environments, it is important to understand the different types of devices and how to use them safely.

Before operating any device or equipment, you should be confident you can use it safely. Often, workplace procedures and operating instructions are available for them. Also, some organisations will provide training on their equipment and software.

Devices commonly used in an office environment include:

- computers, keyboards and mouse
- scanners/printers/photocopiers
- shredders.

Computers

The following types of computers are commonly used in an office environment.

Desktop computers	
	A personal computer (PC) is an electronic device for storing and processing information. A PC consists of the hard drive, monitor, keyboard and mouse. PCs are used in organisations to carry out many different tasks. Organisational data is usually processed using a computer and different software applications.
Laptops	
	A laptop is a small, portable computer that has its hard drive, screen and keyboard within the same piece of equipment. Laptops are popular because they are portable, lightweight and have rechargeable batteries, so you are not relying on a plug-in power supply. However, laptops have some disadvantages. Their small size makes them easy to steal and, because they are not adjustable, they are not as comfortable to use unless a separate laptop stand is available.

Printers, photocopiers and scanners

Offices frequently have one piece of equipment known as a printer/photocopier, which can print, photocopy and scan. Smaller offices may still have separate pieces of equipment for each of these three tasks.

A printer is a device that produces a paper copy of the information displayed on your computer screen. The main differences between printers include: speed, quality of print, extra options available, and cost.

Some organisations have several printers, so you will need to know which one is most appropriate for your printing task. For example, does your document need to be printed in colour or in black and white? Do you need to print on one side or both sides of the paper? Is it okay to use recycled paper, or do you need to use 'clean' paper? Do you need to print at actual size, or can you scale the copy down to fit one page?

Photocopiers make paper copies of documents. There are many different photocopiers with different functionalities, so you will need to familiarise yourself with the photocopier in your workplace. Remember to refer to your workplace procedures for guidance on how to use the photocopier.

Before you press 'print', consider:

- the specific requirements of your task
- the software application you are using
- the capabilities of your printer.

Scanners convert hard-copy (paper) information into digital (electronic) information, which you can send electronically via email.

An image of handwriting or a map on paper, converted into an electronic image, can be inserted into the document you are working on. It can also be resized or cropped if you only want a part of the image. This can also be done using a digital photo instead of a scanned image.

Maintenance on faults

A qualified technician should regularly service and maintain devices as well as repair any faults.

Many of these devices will alert you to the fact that a service is required by showing a message or code on the digital display. They also include a Help function where you can look up the fault and try to resolve the issue. However, you may need to notify the appropriate person in the organisation so that a service can be booked.

A display on a device may indicate:

- when paper has run out and needs to be replaced
- when toner has run out and needs to be replaced
- when a paper jam has occurred
- the staples have run out
- the copied pages have a mark or smear
- the image from a scan is not appearing or is black.

To return the device to correct operation, follow the instructions on its display or the steps set out in its handbook/instructions. The company website for equipment usually contains frequently asked questions (FAQs) and give solutions to common problems.

Alternatively, a colleague or co-worker may be able to assist you to complete these tasks.

Other codes displayed may indicate a more serious fault in the device. These faults should be rectified by alerting the appropriate person in the organisation who will access a service technician.

If you are unsure what to do in any of these circumstances always consult with your supervisor or IT staff.

Select appropriate software

There are two major categories of software:

- system software
- application software.

System software refers to the programs and files that make up your computer's operating system. An example of system software is the Windows 10 operating system.

Application software has a particular data-processing function. Examples of application software include Microsoft Office 365 that includes a suite of applications including Word, Outlook, PowerPoint and Excel.

The choice of application will depend on a number of factors, such as the cost of the software which may come as part of a package. The applications used may also depend on the platform used by the business, which may be based on the nature of the business and the available resources. For example, an organisation may predominantly use Microsoft software, but may also have one or more Apple computers with other software installed.

Different application software is used for different tasks, and you need to choose appropriate technology for each workplace task. The type of technology you use depends on the type of documents you need to produce. For instance, use Microsoft PowerPoint to develop a slide show presentation, rather than Microsoft Word.

Here are examples of commonly used types of software:

Word processing software

- 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 used word processing software is Microsoft Word.

Spreadsheet software

- In accounting, a spreadsheet is a large sheet of paper that displays the financial transactions of a company.
- Spreadsheet software records and processes accounting transactions within areas, such as accounts payable, accounts receivable and payroll. They are used to capture numbers, calculate and track money or spending. This type of document 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 by capturing a lot of information. The most used spreadsheet software is Microsoft Excel.

Database software

- 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.

A single task may require you to use different types of software and equipment. 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. You would also need to use a printer to print out the notes. Here are further examples of commonly used types of software.

Presentation software
Presentation software is used to create slide shows or multimedia presentations. It usually includes three major functions: ▪ The slide show system to display content ▪ Editing that allows text to be moved around from slide to slide ▪ A graphics system for quickly drawing charts and graphs. Presentation software is frequently used to give a clear, visual display of the points covered in a talk. The most used presentation software is Microsoft PowerPoint.
Email software
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). Email protocols include POP3 (Post Office Protocol 3), IMAP (internet Message Application), and MAPI (Messaging Application Programming Interface). 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). A common business email system is Outlook which is part of the Microsoft suite.

Practice Task 2

Question 1

Identify at least two common faults than can occur with devices.

Question 2

Name a technology that could perform each of the following functions. (For example, for the function 'Allows a computer to talk to another computer over a telephone line', the answer would be 'modem'.)

a) Converts hard-copy information into digital information

b) A portable device that processes data

c) Produces a paper copy of digital information

Question 3

What software organises information in such a way that a computer program can quickly select a piece of data?

Question 4

What software would you use if you wanted to type, edit and insert graphics to create documents that you can easily print and save?

Question 5

What software program would you use to create a simple notice to be placed on the staff notice board?

1C Make adjustments to suit own ergonomic requirements

Workplace safety is everyone's responsibility.

Employers and employees must contribute to ensure the workplace is safe. Hazards need to be identified and risks assessed to reduce the risk of injury. If you are working at a computer for an extended period each day, your workstation must be comfortable and designed to help you carry out your tasks efficiently. You will need to organise your work so that you are not doing a repetitive task for a long time. You should also take regular breaks to stand up and stretch.

Health and safety legislative requirements

You must work in line with legislative requirements, regulations, Australian and industry standards, and the relevant codes of practice.

All health and safety legislation requires employers to provide a safe workplace with adequate training and supervision, while controlling workplace hazards and risks.

Health and safety regulations support the legislation by outlining specific health and safety requirements that must be addressed.

The Model Work Health and Safety (WHS) Regulations provide a framework that has been adopted by all Australian states and territories except Victoria and WA, which have their own legislation and regulations.

Health and safety legislation outline legal requirements such as:
▪ managing risks to health and safety ▪ promoting and maintaining the health, safety and welfare of people at work ▪ protecting people at work from injury and illness, including psychological injury ▪ protecting the health and safety of the public in workplaces ▪ consulting workers and encouraging them to maintain health and safety ▪ providing rehabilitation and maximum recovery for injured workers.

Health and safety policies and procedures

Health and safety policies and procedures are documents that ensure all employees work safely and effectively.

All workplaces in Australia are required to have a health and safety policy in place that describes the organisation's and employees' responsibilities for maintaining health and safety. The policy should include the organisation's goals and objectives regarding health and safety. This policy will help you fulfil your duty of care as an employee.

The following information relates to working in an office and using a computer workstation. It should be included in an organisation's health and safety procedures.

Health and safety procedures outline:
▪ workstation ergonomics ▪ standard safety precautions and housekeeping ▪ safe handling of hazardous substances, e.g. cleaning products ▪ emergency and fire drills ▪ hazard identification and risk control ▪ manual handling ▪ emergency contact numbers, including local doctors and hospitals ▪ location of first-aid equipment ▪ details of first-aid officers.

Ergonomics

The aim of ergonomics is to reduce the risk of accidents, injury and illness by applying safe work practices.

Ergonomics is about creating comfortable working conditions by adapting workstations, tools and equipment to an individual worker's needs. It also improves performance and productivity in the workplace. Ergonomics covers all aspects of working, from physical stresses such as sitting at a workstation all day to environmental factors such as noise, air conditioning and lighting.

When your posture is poor, you may suffer from aches and pains. Spending a long time in the same position can put stress on your body and this can be made worse if you are in an uncomfortable or poorly supported position. These symptoms may be very slight at first, but if you continue to have poor posture your symptoms may get worse and become intolerable. They may result in cumulative stress given the constant strain on your muscles, nerves or tendons.

When setting up your workstation, make sure your posture will not cause you pain or discomfort. The equipment you use needs to be adjusted to suit your body shape and size, and the tasks you are doing.

Ergonomic workstation design

How your workstation is designed can affect your health and wellbeing.

Several physical problems can result from poor workstation design; for example, lower back strain may result from sitting in a chair that does not support your back. Some features of the workstation may vary depending on the type of computer work being performed.

The following table contains guidelines for setting up an ergonomic workstation:

<table>
<tr><th colspan="2">Chair</th></tr>
<tr><td></td><td>Adjust seat and backrest so that:
Seat height allows user’s feet to be flat on the floor, thighs horizontal and lower legs vertical
Backrest fits into the curve of user’s lower back
There are at least two centimetres of space between the front of the seat and the back of the knees
Armrests do not hinder user carrying out tasks</td></tr>
<tr><th colspan="2">Desk</th></tr>
<tr><td></td><td>Make sure that:
User’s head is erect when seated at the desk
Surface of the desk is just below user’s elbow height
If desk height cannot be adjusted, chair is raised (footrest optional)
Space below the desk is clear so legs don’t cramp
Equipment on the desk is within reach</td></tr>
<tr><th colspan="2">Keyboard</th></tr>
<tr><td></td><td>Make sure that:
Angle is adjusted to suit the user (move its under-supports)
It remains close to the front of the desk
Wrists do not rest when typing (not bent up, down or to side)
Wrist supports are used only when pausing
Keys are tapped lightly
No documents are placed between keyboard and user</td></tr>
<tr><th colspan="2">Mouse</th></tr>
<tr><td></td><td>Make sure that:
Both mouse and pad sit directly beside the keyboard
Wrists are straight and not leaning on the desk
Mouse is held lightly
Mouse is not held when not in use
Alternate sides of keyboard are used sometimes</td></tr>
<tr><th colspan="2">Monitor</th></tr>
<tr><td></td><td>Position/adjust so that:
Top of monitor is level with or slightly lower than user’s eyes OR monitor is placed on a platform
Viewing distance is between 40 cm and 70 cm
Screen angle is at 85–125 degrees (preferably 35 degrees)
Document holder is at same viewing distance
Anti-glare filter is added if needed</td></tr>
</table>

Desktop layout

Items on your desk, including equipment and resources, should be arranged so they are within easy reach.

Your desk area can be divided into three zones:

- the **optimum reach zone** – the area closest to you, where your hands operate most of the time
- the **maximum reach zone** – where items are further away, but still close enough to reach comfortably
- the **outer reach zone** – where you may have to bend forward or stand to reach items.

Make sure your desk is organised so that frequently used objects, such as your keyboard, are close to you. Objects that are used less frequently, such as your phone, should be out of the way but still within easy reach. Other resources that are rarely used, such as in- and out-trays, should be in the outer reach zone.

Here are some devices that can help you maintain a good posture at your workstation:

Document holders	Document holders are designed to hold papers and reference material in a convenient position for viewing. Place your document holder in the correct position. If it is below the screen or too far off to the side, each time your eyes look from one source to the other, your pupils have to adjust. Doing this for long periods of time can cause headaches and eyestrain. Place the document holder at a similar level, angle and distance as the screen to avoid having to shift your eye focus.
Angle boards	Angle boards allow the user to maintain the correct posture when reading by reducing the angle between the work surface and the user. These supports can be adjusted to a suitable height and angle and enable comfortable reading with the neck correctly positioned. Try to keep your neck as straight as possible when you are reading.
Footrests	A footrest may be necessary if you can't place your feet comfortably on the floor. Footrests allow your feet to rest at the correct height and on a tilting angle, which prevents strain on the lower back.
Headsets	If you use a telephone for long periods of time, it is a good idea to use a headset. A headset will keep your neck straight and your arms free. Headsets prevent you from bending your neck to support the telephone handpiece.

Practice Task 3

Question 1

Use the checklist to set up your workstation.

Go through each point and make any necessary adjustments to your work area. You may need another person to help you check your posture. If you are not able to tick some of the checkpoints, discuss making alterations to your workstation with an appropriate person.

Chair

- ◯ Is the seat height-adjustable?
- ◯ Is it high enough to allow you to sit comfortably at the keyboard?
- ◯ Is it stable?
- ◯ Does it swivel?
- ◯ Is the height of the backrest adjustable and does it tilt backwards and forwards?
- ◯ If it has arms, can you still get close enough to the desk and swivel the chair?
- ◯ Are your feet flat on the floor or are you using a footrest?
- ◯ Are you sitting up straight with the backrest firm against your back?

Desk

- ◯ Is it large enough to allow the screen and keyboard to be correctly positioned?
- ◯ Is it low enough to allow you to keep your forearms horizontal or sloping downwards?
- ◯ Is it high enough to allow your thighs to fit comfortably underneath?

Keyboard

- ◯ Can it be tilted to allow you to adjust it?
- ◯ Are the symbols on the keys clear and easy to see?
- ◯ Is there sufficient space in front of it to allow you to correctly position your arms?

Monitor

- ◯ Does the monitor have easily adjustable brightness and contrast controls?
- ◯ Is the image on the monitor stable and flicker-free?
- ◯ Are there adjustment mechanisms to allow the monitor to be tilted, swivelled or raised to avoid glare and reflections, and help you keep a natural and relaxed posture?
- ◯ Are you sitting far away enough from it for comfort?

Question 2

What are three possible consequences for an organisation in which employees do not consider their physical health?

Question 3

Provide one example of what should be included in a WHS policy?

Summary

- You need to identify the purpose, audience, format and presentation requirements of a task before beginning it.
- You should clarify any requirements with your supervisor before beginning the task.
- You need to choose appropriate business technology for your work tasks.
- The main types of application software are word processing, spreadsheet, database and presentation programs, as well as email software.
- All organisations should have policies and procedures for using technology. You need to follow these procedures at all times.
- When you are using technology, all equipment must be used correctly and safely in accordance with occupational health and safety guidelines.
- Ergonomics deal with creating comfortable conditions to work in.
- A badly designed workstation can have an impact on your health and wellbeing.
- Adjust your workspace to suit your body shape and size, and the tasks you are doing.

Learning Checkpoint 1

Select and prepare to use technology

Part A

Read the case study and answer the questions that follow.

Case study

Jane is a manager at an accounting firm with approximately 20 staff. She tells Sylvia that the following day (Tuesday), between 9 am and 10 am, the lift in the building is going to be tested and during the testing the lift will not be available for use. The only other way to move between the levels of the building is by the stairs. She asks Sylvia to ensure that all staff are aware of this situation.

1. Thinking about the technology and software available, what two ways could Sylvia inform staff of the situation?

2. What is the purpose of the task that Sylvia has been asked to do?

3. Sylvia decides to create a notice. Who is the audience for this notice?

4. What technology (devices) and what software can Sylvia use to create the notice?

5. Suggest two ways Sylvia could format the information on the notice to make it easy and clear to understand.

6. Before Sylvia creates the notice, she wants to make sure she has understood the request and be confident that her plan for the notice is appropriate. Who should she ask to confirm this?

Part B

1. List an appropriate use for each of the following software types:
   a. Word processing
   b. Spreadsheet
   c. Database
   d. Presentation
   e. Email

2. The table below shows a range of tasks an assistant at a promotions company may be required to undertake. Complete the following table by choosing the appropriate technology and software for each of the listed tasks.

Task	Technology	Software
Email eight customers and send each of them a large file of information		
Word process the company's annual report and arrange for copies to be posted to the six directors of the company		
Place a sign above the kitchen sink asking people to wash up after they have used the kitchen		
Do some internet research and compile your findings in a word processed document, which must then be emailed to your manager		

3. List some of the common faults that can happen when using equipment, such as a printer or scanner.

Part C

1. List three reasons why a person may have physical discomfort when spending a lot of time at a workstation.

2. For each reason you listed above, describe a solution that could relieve the physical discomfort.

3. If a worker's office is poorly lit and they experience eyestrain while using a computer for a length of time, what are their WHS obligations and what are their employer's obligations?

Topic 2 | Input and process information or data

2A Identify and open applications

2B Enter, check and format information or data

2C Use relevant help functions

2A Identify and open applications

To complete your task, you will need to be able to identify and open the application you have selected.

In the previous topic, you learnt about some common documents, spreadsheets and presentation applications used in organisations, and the software used to create them. You have also had a chance to look at your task and decide the technology and software application you need to use. So now you can get started.

However, it is important to note that the examples given in this Learner Guide are based on Office365 apps used in 2019. Earlier versions will be similar in how they work, although there may be some minor differences in the appearance or functionality of some elements.

Identify the software application

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

Microsoft Office is the most common suite of business software used in organisations across the world. If this is what your organisation uses, it should already be installed on your computer.

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 Outlook has an O in the icon.
- Microsoft Word has a W in the icon
- Microsoft Excel has an E in the icon
- Microsoft PowerPoint has a P in the icon

The icons may be installed on your desktop or taskbar. Look to see if you can find them. If they are not there, you can click in the search bar and start typing 'Word' and a link to the software will appear.

If you need to use another software application, look for the icon either on your desktop or taskbar, or search for it.

Once you've found the software icon or link, you can use your left mouse button to double-click on it and open the application. The application should launch with a blank new document, spreadsheet or presentation so you can get started.

Another way you can open a software application is by opening a file directly from Windows Explorer. Your computer will recognise the type of file and automatically open the software application associated with that file. If you need to start by opening an existing template, locate where the template is stored, double-click on the template file and it will automatically open in the software.

You need to be aware that Microsoft Office can open a variety of file types. The file type can be identified by the file extension. The following table shows common file types and their extensions.

Software	Commonly used file extensions that software can open	
Microsoft Word	.docx (previously .doc) .dotm (previous .dot) .docm .htm, .html	.rtf .txt .pdf
Microsoft Excel	.xlsx (previous .xls) .csv .htm, .html	.txt .pdf
Microsoft PowerPoint	.pptx (previous .ppt) .pptm .ppsm .potm .potx\.rtf .tif .wmf	.wmv .bmp .gif .jpg .mp4 .pdf .png

If you click on a file and it doesn't open in the software application you want it to, you need to right-click on the file with your mouse and choose **Open with...** A menu will appear, and you can select the software you want to use to open the file.

If you need assistance, you should:

- ask for guidance from:
  - a manager or supervisor
  - an experienced colleague
- refer to relevant workplace documents, such as:
  - policies and procedures
  - other relevant documents.

Practice Task 4

Question 1

Look at the tasks in the table below (in the left-hand column). In the middle column, write the software application you will use for each task. And, in the right-hand column, write the file type you will create. The first one has been completed for you.

Task	Software	File type
Memo	Microsoft Word	.docx
Letter		
Sales data table		
Pie chart with sales data		
Team meeting slides		

Question 2

You need to open a pdf file in Microsoft Word. Explain one method you can use to do this.

2B Input, check and format data

Inputting information or data is the most important task when creating a business document.

Business documents contain information or data (words, numbers, images, tables, charts, etc.).

When creating a business document, you must make sure that you enter the correct information accurately into the document. After entering the information or data, check that you entered it correctly without any mistakes. You can then format the document to suit the document type and the organisation's requirements.

Methods for inputting information or data

There are several methods you can use to input information or data into your business document.

The common method of entering information is by using your keyboard and mouse, but it's helpful to know other ways in to input data. Below are common methods to input data that apply to most software applications.

Method	Explanation
Typing	Words and numbers are entered via the keyboard into your document or spreadsheet.
Copy and pasting content	If you want to include content from another document or content that already exists in your current document, you can use the copy and paste function. Select and highlight the content you need using your mouse, then either right-click and select copy or use the keyboard shortcut CTRL + C, then click in your document or sheet and right-click to choose paste or use the keyboard shortcut CTRL + V.
Insert or import another file	Use the insert function in your software program to choose images or other files that you want to include in your document. Some software may refer to this as importing. Word provides examples of illustrations in the ribbon, such as shapes and charts, that can be inserted into a document.
Insert or import from scanner	Depending on your set-up and the software you are using, you may be able to import files directly from your scanner.

Checking and amending information or data

Once you've entered all your information or data, you need to check to make sure it meets requirements.

Mistakes often occur during data input so you will need to check your data for accuracy. You will also need to check that the document produced meets the task and organisational requirements. If you have made mistakes when inputting data, you will need to locate the mistakes and fix them. Most software applications have tools to help you check and amend your documents.

Also, many organisations have their own checklists for checking and amending documents. This is often referred to as proofreading and editing. Using a checklist will help you edit and proofread quickly and efficiently. If your organisation does not have a checklist, consider developing one to use.

Here are some things to consider when checking your information or data:

Tips and tricks for checking/proofreading:	
▪ Consider printing a copy of the document; it can be 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 that aspects other than meaning, such as spelling errors and layout, stand out more. ▪ Use the spelling and grammar checking functions at first proofing – but don't depend on them entirely. ▪ Double-check numbers.	▪ Allow time between completing the final copy and proofreading; then look at it with fresh eyes. ▪ Proofread when you're most alert. ▪ Don't try to proofread all types of mistakes at once. During each read-through, focus on different aspects. ▪ Avoid distractions. ▪ Watch out for homonyms. These are words that share the same spelling or pronunciation but have different meanings, e.g. there and their; two and to. ▪ Watch out for contractions and apostrophes, e.g. can't, you'll, they're. ▪ 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.

Using Word functions to amend information or data

Microsoft Word has many functions to help you check and amend documents. Some of these functions are described below.

Spelling & Grammar

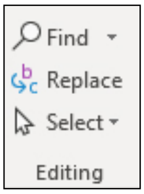
You can access this function by selecting Review from the top tool bar, then selecting the Spelling & Grammar function. This function will identify spelling and grammar issues in your document and prompt you to fix them.

Find and replace text

You can automatically replace a word or phrase with another with this function. For example, you could replace **Acme** with **Apex**.

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

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



2. Click the **Replace** tab.
3. In the **Find what** box, type the text that you want to search for.
4. In the **Replace with** box, type the replacement text.
5. Do one of the following:
   - To find the next occurrence of the text, click **Find Next**.
   - To replace an occurrence of the text, click **Replace**. After you click **Replace**, it will move to the next occurrence of the text.
   - To replace all occurrences of the text, click **Replace All**.

Track Changes

If you want to see the amendments you have made to a document you can use the Track Changes function. Before making any amendments, turn on the Track Changes function, which is under the Review tab on the top tool bar.

Formatting information or data

Business documents will need to be formatted according to task and organisational requirements.

If you have created your document using a template, you should already have a format that is appropriate for your document type. However, you will still need to check that the format of your document meets the task and organisational requirements.

You have already learnt that formatting refers to how the information or data appears. So, you will need to check fonts, sizes, layout, headers and footers and any other requirements specified by the task and your organisation.

You can use the functions in your software applications to format your information or data. The following sections describe the formatting functions in Microsoft Word, Excel and PowerPoint.

Ribbons – tool buttons

In Microsoft Word, a number of 'ribbons' provide access to commonly used tools.

Ribbons are categorised under various heading tabs such as **Home** and **Insert**. Each category has a tab so you can easily switch to the different tool buttons you need to use.

Additional tabs may appear with groups of tool buttons that are relevant to an action you are performing. For example, when you choose the **Outline view**, a new set of tools appears under an **Outlining** tab.

For each tab, there are groups of tools available. For instance, under the **Home** tab the available tool groups are:

- Clipboard
- Font
- Paragraph
- Styles
- Editing.

Page setup

The page setup determines the margin size, orientation, and size and number of columns on the page.

The **Layout** function allows you to choose options to change the overall appearance of a document by adjusting various options. As part of the **Layout** tab, there are various **Page Setup** tool buttons that enable quick and easy access to the options required to make alterations. You can use these options to alter the entire document or just part of it.

For example, you can change the orientation of a document from portrait to landscape. 'Portrait' means that the height of the document is greater than the width, like a portrait painting. 'Landscape' means that the width of the document is greater than the height, like a landscape painting.

To modify the page setup of an entire document, place the pointer anywhere in the document. To modify a portion of a document, select the text you want to change by highlighting it (holding your mouse down while you drag over the text).

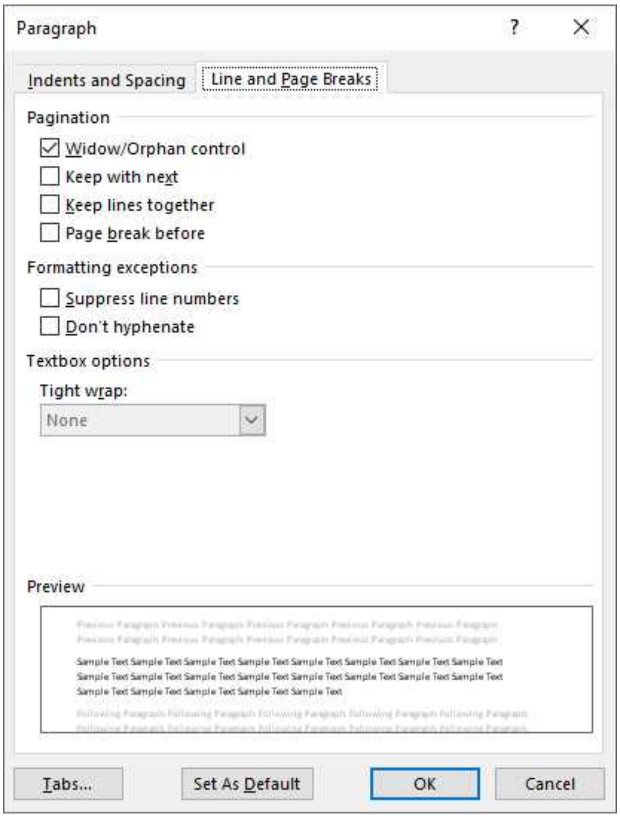
Paragraph formatting

Paragraph formatting is used to break up the text on a page and create a more visually appealing layout. Paragraph formatting includes:

- indents – how far a paragraph is positioned from the margin
- alignment – how your paragraph text will appear on the page (right-aligned, left-aligned, centred or justified)
- spacing – the space before and after each paragraph and between each line.

To access the paragraph formatting tools, go to the **Home** tab. In the **Paragraph** section, you can change bullets, indents, and spaces between lines and paragraphs. Hover the mouse over each icon to learn more about what it does. You can also make more specific adjustments by clicking on the icon in the bottom right corner of the Paragraph section.

Pagination relates to the division of a document into pages, as in a book. For example, you can control where page breaks are positioned by selecting the paragraphs you want the options to control, then selecting the **Line and Page Breaks** tab in the Paragraph section and ticking or unticking the pagination options. For example, the **Widow/Orphan control** option, which is set by default, prevents the first or last line of a paragraph from being positioned on the top or bottom of a page.



Columns

Columns are commonly used for newsletters, reference manuals and other documents. You can use the column function to flow the information on a page over a series of columns, as they would appear in a newspaper.

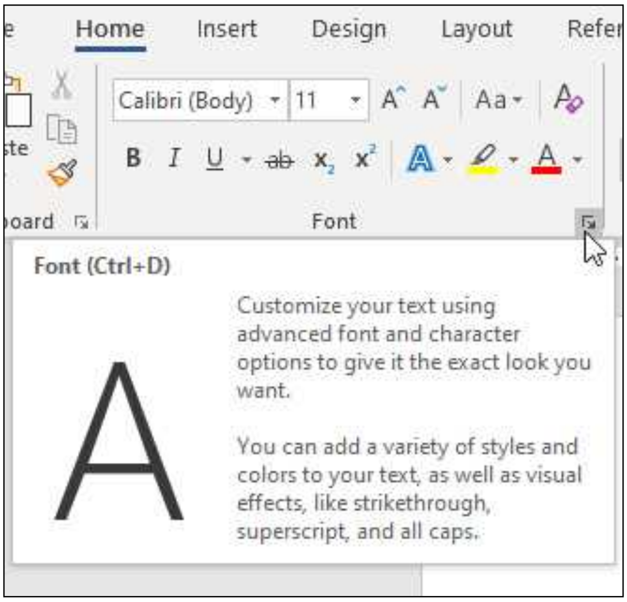
To change the number of columns, select the **Layout** tab, then select the **Columns** drop-down menu and choose the number of columns you want on the page.

Format font type, size and colour

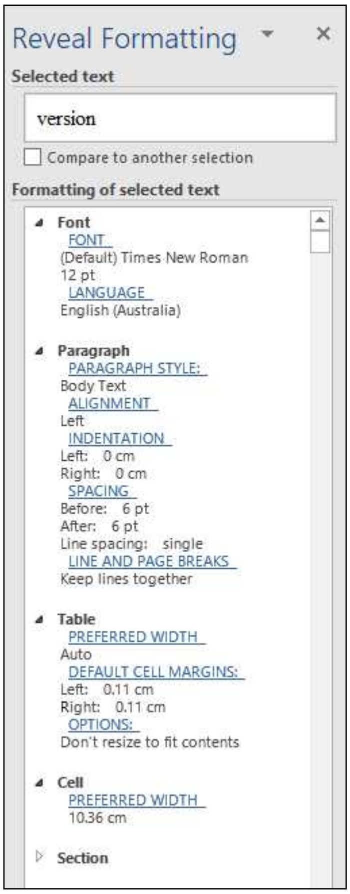
A font is the style of type used in a document. Examples include Times New Roman, Arial and Book Antiqua. Usually documents have a consistent style, such as one font for headings and another for the main body of text.

Font formatting can make the text more legible by increasing the font size in a document. It can be used to emphasise text through the use of bold, underline or italics. Coloured font can be used to highlight important information or draw the attention of the reader. You can even add special effects to fonts.

From the **Home** tab, you can make selections using the formatting tools for **Font**, including changing the font type and size. Hover over each option for more information.



You can find out more about specific formatting of an on-screen document by pressing Shift F1. This will display character and paragraph settings, which you can change by highlighting text and clicking on the relevant sections.



Bullets and numbering

Bullets and numbering can be used to create lists in a document.

This function can improve the presentation of text and make it easier to read by breaking up the main points. You can access the Bullets and Numbering options from the **Paragraph** section in the **Home** tab.

A multilevel number list can be created using the **Multilevel List** button. The paragraph level can be adjusted by clicking the **Increase Indent** or the **Decrease Indent** button from the formatting tools.

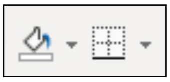
Below are examples of different styles of lists:

Bulleted list
▪ A bullet, such as a thick dot or hyphen, is inserted at the start of each new paragraph. ▪ The bullet and text are indented.
Numbered list
1. A number is inserted at the start of each new paragraph. 2. If you add or delete a paragraph from the list, the numbering will automatically update. 3. You can also right-click on a number and set a different numbering value using the drop-down list.
Multilevel list
▪ Multiple features can be highlighted with multilevel lists: – These lists are good for indexes or other complex documents. – Each list level has a different indent. ▪ Numbers or letters are automatically inserted: – Explore the options in the drop-down list.

Borders and Shading

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

You can add lines, boxes and shading to paragraphs, selected text and tables. A border can also be used to frame an entire page. You can access the Borders and Shading options from the Paragraph formatting tools in the **Home** tab.



Page numbering

Page numbering is commonly used in long or formal documents, such as reports.

It may also be used in outgoing correspondence, such as letters. Page numbers can be placed on each page by selecting the **Insert** tab and using the **Page Number** drop-down menu.

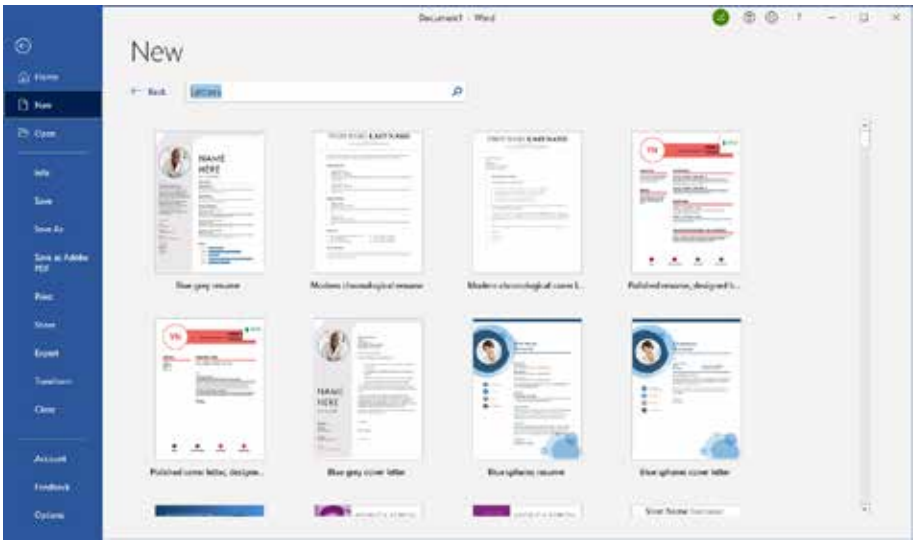
You can use the drop-down menu to select where the page number will be positioned, selecting from the top, bottom, left or right side of the page. You can also adjust it further via the header and footer; for example, adding the word 'Page' before the number, or changing the font type and size.

Practice Task 5

Part A

In the following exercise, you are required to create a letter using a Word template.

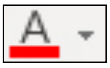
1. Open Microsoft **Word**.
2. Select the **File** tab and then select **New**.
3. Search for 'Letter' and press Enter.



4. Choose an appropriate template from the list.
5. Select **Create**.
6. Write a short letter on a subject of your choice. Save your letter as 'MyLetter'.

Part B

For the following exercise, use the styling and border options to format your document.

1. **Open** your MyLetter document. Select a few sentences of your document. From the **Home** tab, change the attributes of the font by making selections using the formatting tools.
2. Select a few other sentences from your document. Change the font colour using the **Font Colour** tool. 
3. Select a line type for your border, e.g. **All borders.**
4. Using the same selected text, select the **Shading** drop-down menu. 
5. Choose a colour.
6. Save and close your document.

Formatting data in Microsoft Excel

Formatting a spreadsheet effectively means to present the information in a way that is easy to understand. It should be easy for people to enter data into the spreadsheet. Excel treats data differently, depending on the type used. These include:

- dates and times
- text (such as names, addresses and product information)
- figures (such as quantities, prices, sales figures and interest rates).

Dates and times

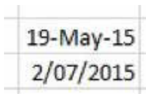
Dates can be entered in the following formats:

- Day/Month/Year = dd/mm/yyyy
- Month/Day/Year = mm/dd/yyyy

You need to be clear which format is being used.

Times use am and pm or a 24-hour format. For example, 6.00pm is the same as 18.00.

Excel tries to match the formatting with the way the information is typed in.



Always confirm the correct formats for your spreadsheet.

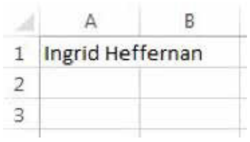
To automatically insert the current date into a cell, select the cell and press **Ctrl+;**

To insert the time, press **Ctrl+Shift+;**

To automatically put the current date in a cell in the worksheet, you can use the TODAY function: =TODAY()

Text

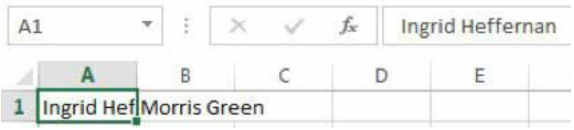
When entering text, you will notice it is automatically aligned to the left of the cell. You will also notice that if there is no data in the adjacent cell, the text will overflow into it.



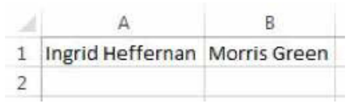
If there is data in the adjacent cell, the text that is entered will be truncated (chopped off).

It may appear that the data is lost, but it is still contained in the cell.

A simple way to confirm this is to click in the relevant cell and view the cell's contents in the **Formula Bar**.



To ensure the printed and on-screen versions of the spreadsheet show the cell's full content, you need to adjust the width of the cell or wrap text within the cell.



Text is commonly used for entries of lists of information such as names, addresses and product details.

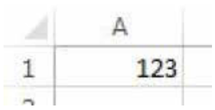
To wrap text in a cell, select the cells and use the **Wrap Text** tool 

, which is located in the **Home** tab.

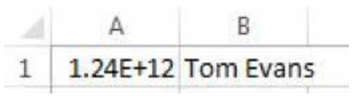
Wrap Text is commonly used for longer entries where you do not want to adjust the column width, but want to be able to read all of the information in the cell, such as address details.

Figures

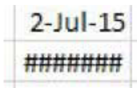
When entering numbers, they will automatically be aligned to the right of the cell. In most cases, if the number is longer than the cell, the width of the cell will automatically adjust. There is a limit of 15 digits per cell.



Sometimes numbers appear as shown below. This occurs when the number has too many digits for Excel to include in the cell, so it rounds it off and puts it in scientific notation.

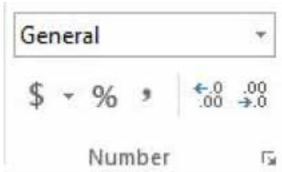


When the cell is not wide enough for an entry, it is filled with a row of hashtags (#). This is a different situation to having too many digits.



To correct the problem, adjust the cell width.

You can also use the Number section in the **Home** tab to increase or decrease the number of decimal places shown. It is also possible to make number formatting choices such as currency.



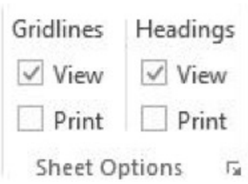
Here are some other formatting tools.

Formatting text

The options for formatting text are very similar to those available in word-processing programs. For example, you can highlight important text and numbers using bold or italic, underlining or shading. You can also adjust the column width or row height and adjust the alignment of the text – centre, right, left or angle. You can choose how numbers are presented, such as in currency format, as decimals with a particular number of decimal places or in date format.

Headings

Headings in a spreadsheet are the letters above the columns and the numbers beside the rows. These headings are useful because they give you an understanding of where you are located within the spreadsheet. Some people prefer to work without the headings displayed. Headings can be turned on and off by selecting the Page Layout tab and checking or unchecking the Headings View box.



You can also choose whether to print headings.

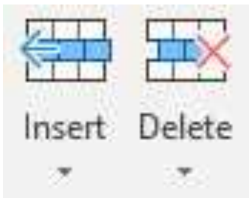
Displaying or printing headings is useful when you are checking that information has been accurately entered, particularly when checking for errors with formulas or functions.

Headers and footers

Headers and footers are used to record common information in the margin of the report. The header is at the top of the page, while the footer is at the bottom. Headers and footers are automatically repeated on all pages of the spreadsheet. Headers and footers might include the company name and logo, name of the report, creation date and file reference information.

Adding and deleting columns and rows

To add a new column or row go to the **Home** tab and select **Insert**. Choose **Insert Sheet Columns** or **Insert Sheet Rows** from the drop-down menu. A new column or row will be inserted adjacent to the cell currently selected.



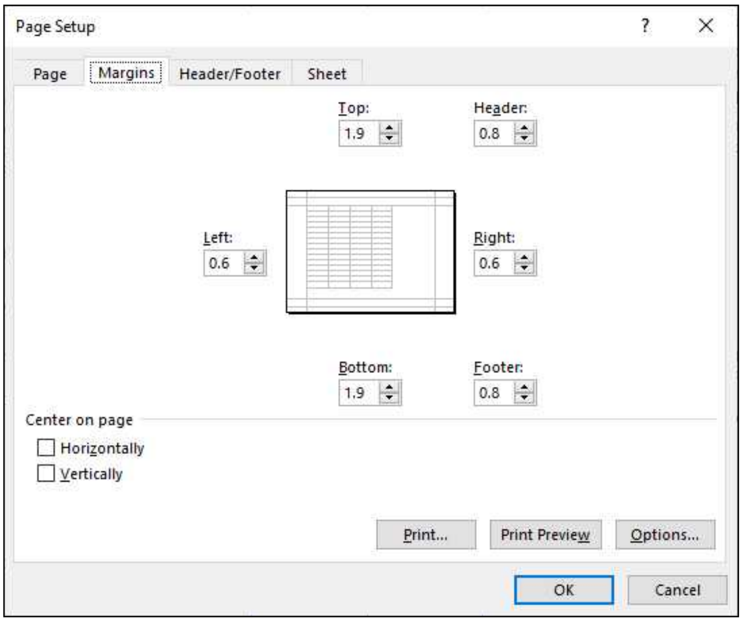
To delete a row or column, select **Delete**. Choose the appropriate option to delete (cell, row, column or sheet). If you make a mistake, you can click **Undo** or press **Ctrl+Z**.

Centre data on the page

The default alignment for printing a spreadsheet is that the data is aligned to the left and top of the page in line with the margins.

In many cases, especially in smaller reports, it is preferable to centre the data on the page both vertically and horizontally.

To do this, select the **Page Layout** tab. Select the **Margins** drop-down menu, then select **Custom Margins**.



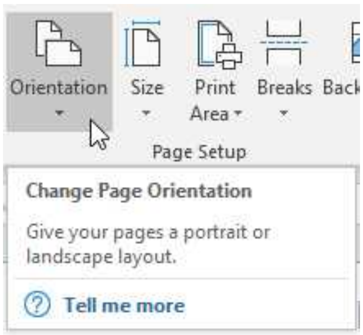
Check the options to centre on the page both **Horizontally** and **Vertically**. The display in the dialogue box shows how the changes will appear in the spreadsheet. You can also select **Print Preview** to see how data will be displayed on the page. Select **OK**. When printed, the data will now be aligned vertically and horizontally on the page.

Orientation of a spreadsheet

When printing a spreadsheet, the default setting is to print in portrait orientation.

In the workplace, however, it is common for Excel reports to be printed in landscape orientation. In most cases, this is because spreadsheet reports contain more data that spreads across the page than down the page.

To alter the orientation of your report, select the **Page Layout** tab, then select the **Orientation** drop-down menu and select **Landscape**.



If not all of your data appears on one page and some spills over to the next, you can force the data to be scaled to the size that you prefer (that is, 80% of size or fit one-page wide by one-page tall). To change the scaling options, go to the **File** tab, then select **Print**. You can change the scaling options using the drop-down menu under **Settings.**

Practice Task 6

Consider and compare these two spreadsheet examples.

Good Fruit Company Weekly Stock Report @ 30 June				
	Stock at start of week	Stock out	Stock in	End stock
Apple	1433	234	123	1322
Apricot	2342	1234	1232	2340
Banana	2334	2111	2342	2565
Grape	3465	2341	1231	2355
Kiwi fruit	2231	1321	1235	2145
Orange	2342	1231	1231	2342
Peach	1311	1231	1324	1494
Pear	2521	2345	1444	1620

Good Fruit Company				
Weekly Stock Report @ 30 June				
	Stock at start of week v	Stock out	Stock in	End stock
Apple	1433	234	123	1322
Apricot	2342	1234	1232	2340
Banana	2334	2111	2342	2565
Grape	3465	2341	1231	2355
Kiwi fruit	2231	1321	1235	2145
Orange	2342	1231	1231	2342
Peach	1311	1231	1324	1494
Pear	2521	2345	1444	1620

Question 1

Identify at least three differences in formatting between the two examples.

Question 2

Briefly explain which version you believe is easier to read.

Functions

A function is a formula that is built into a spreadsheet.

Functions can save a lot of effort by doing quite complex calculations in one cell. Excel provides functions to do a variety of common calculations, such as SUM or AVERAGE. For example, =SUM(B5:B17) adds all the numbers in the range of cells from B5 to B17. Functions can be used in Excel to perform a variety of mathematical, statistical and financial calculations to help you to analyse information. Some common functions used in Excel are shown in the following table.

=SUM(range)	▪ Adds the numbers in the cells that are within the range specified in the brackets ▪ Example: Calculates the total sales figures for a given period
=MAX(range)	▪ Finds the highest value from cells that are within the range specified in the brackets ▪ Example: Shows the highest student result from the group
=MIN(range)	▪ Finds the lowest value from cells that are within the range specified in the brackets ▪ Example: Shows the lowest student result from the group
=AVERAGE(range)	▪ Finds the average of numbers in the cells that are within the range specified in the brackets ▪ Example: Shows the average result of all students
=COUNT(range)	▪ Counts the number of items in the range ▪ Example: Counts the number of results entered for the class

Automatic functions

If you have created a formula in one cell, and you want to repeat it in additional cells, you can either copy it or use automatic functions.

AutoFill is used to repeat sequenced information that aligns with the selected cell. Use the AutoFill handle  to repeat the sequence of formulas and functions.

AutoSum enables you to add values automatically using the SUM function. Select a range of values that you want to calculate and select **AutoSum**, which can be accessed from the **Home** tab.

Practice Task 7

Question 1

Practise entering this data into a blank spreadsheet.

Name	Address	Phone number
Mary Buchanin	29 Green Rd, Altona 3018	9983 0194
Ginger Smith	988 City Rd, Melbourne 3000	9876 3939
Lionel Ha	1/23 Brown Rd, Laverton 3028	9762 8373
Ali Simoghin	21/1 Tree St, Williamstown 3016	9853 8391

When entering data:

- **AutoFit** the column width to enable all the data to be viewed.
- **Sort** the data in the Name column from A to Z.
- **Save** the worksheet as 'Customer contacts'.

Question 2

Look at these examples of a customer accounts worksheet and the customer documentation used to input the data.

	A	B	C	D
1			Custoemr Accouints	
2				
3	**Customers**	**Balance**	**10% Interest**	**New Balance**
4	Smithe	$5,500.00	$550.00	$6,050.00
5	Cartter	$4,000.00	$400.00	$4,400.00
6	Andrew	$3,450.00	$345.00	$3,795.00
7	Philips	$300.00	$30.00	$300.00
8	Elliott	$2,500.00	$250.00	$2,750.00
9	Frank	$500.00	$50.00	$550.00
10	Luiee	$34.00	$3.40	$37.40
11				
12				

Customer documentation

Customers	Balance
Smith	55.00
Carter	4,000.00
Andrews	3,455.00
Phillips	3,000.00
Elliot	2,500.00
Franks	5,000.00
Luie	34.00

Check the data in the customer accounts worksheet against the customer documentation. How many errors are there in the worksheet?

List the errors below.

Question 3

Recreate the 'Customer accounts' worksheet with accurate information.

Question 4

Use the AutoSum function =SUM(D4:D10) to total the column D. What is the total balance figure for customer accounts?

Question 5

Change the font, heading colours and cell size so that they are different to the original.

Formatting information in PowerPoint

Before you format your presentation, familiarise yourself with some key PowerPoint functions and terminology.

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. Here is a list of functions:

Placeholders	Boxes with dotted lines that appear when you create a new slide. This is where you add your text or content, such as an image or chart.
Slide master	Allow you to change the style of text and have the style reflected throughout the whole presentation.
Notes master	Allow you to create notes that accompany your presentation.
Importing	Allow you to import information from other applications such as Microsoft Word or Excel, as well as images or graphics.
Handout master	Allow you to create handouts to go with your presentation.
Colour schemes	Provide a selection of background colours that you can apply to your presentation.
Templates	Offer colour schemes and text formatting to design a presentation with a particular look. You can alter the colours and text formats chosen within the template itself.
Hyperlinks	Allow you to create a link in the presentation to another slide in that same presentation, or to another software fil, website, video, etc.

Applying and creating templates

Templates store design information that you can apply to a presentation to consistently format the content on all slides.

When you create a template in PowerPoint, you create a .potx file that captures any customisations you make to a slide master, layout and theme combination.

Below is an example of a template.

This template contains placeholder content 'Autumn Photo Album'. It also contains formatting, colour, background and layout features.

Each template contains a slide master that must have at least one layout (but can contain more) for you to use in a presentation. While the template above was created by a designer, you can create a template by creating one or more masters, adding layouts, then applying a theme.

To create a template, go to the **Design** tab. If you want to use a default slide master, choose one from the designs shown at the top of the screen.

Note: If you want to add another slide master or create a new slide master, refer to PowerPoint help menu search feature by typing 'create new slide master' into the space next to the magnifying glass icon. This will take you to this topic and other recommended topics with instructions to follow.

Apply a layout by using the standard layouts that are built into PowerPoint 2019. If you want to customise your layout, refer to 'layout' in the help menu.

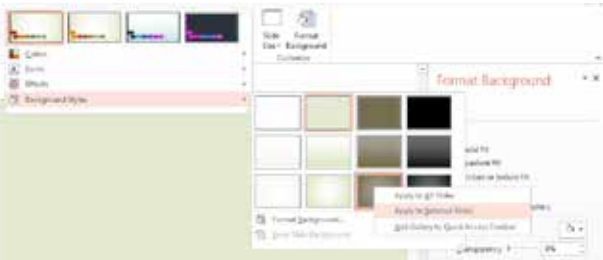
Once you have finished creating a template, go to the **File** tab and then click **Save As**. Choose where you want to save the file. In the **File name** box, type an appropriate file name. In the **Save as type** drop-down menu, click **PowerPoint Template**, then click **Save**.

Background styles

Theme colours, theme fonts and theme effects make up a theme background. A theme may be applied to a file as a single selection.

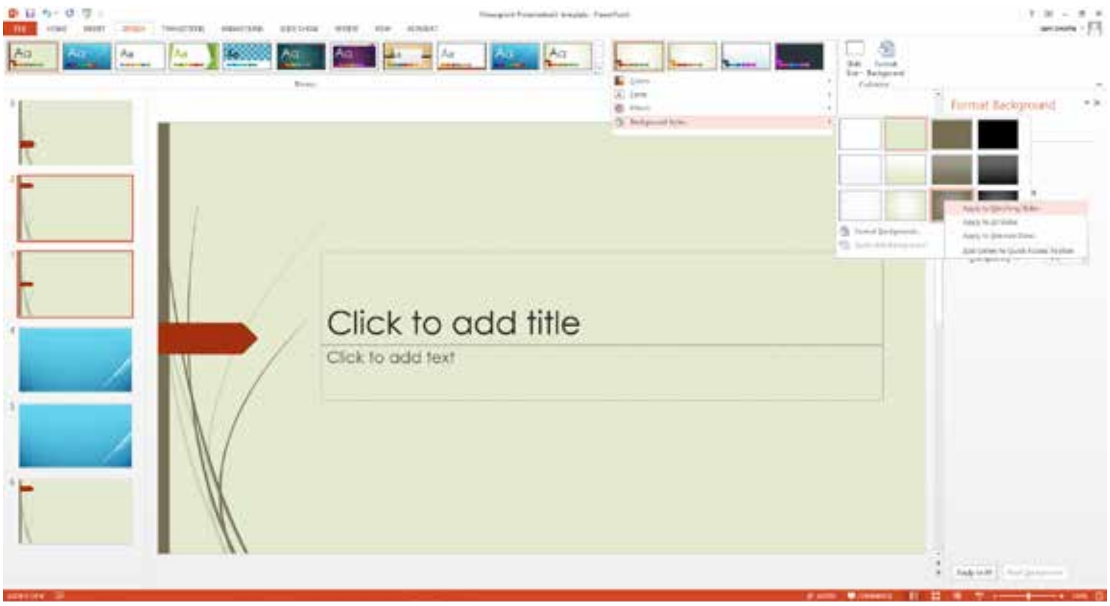
Click on the relevant slide to add a background style to your presentation. To select multiple slides, click the first slide on the left, then press and hold **Ctrl** while you select the other slides.

In the **Design** tab, click the arrow in the **Variants** group to open the drop-down menu. Hover over to **Background Styles** to view the options.



Right-click the background style you want, and then do one of the following:

- To apply the background style to the selected slides, click **Apply to Selected Slides**.
- To apply the background style to all of the slides in your presentation, click **Apply to All Slides**.
- To replace the background style for the selected slides and any other slides in the presentation that use the same slide master, click **Apply to Matching Slides**. This option is available only when your presentation contains multiple slide masters.

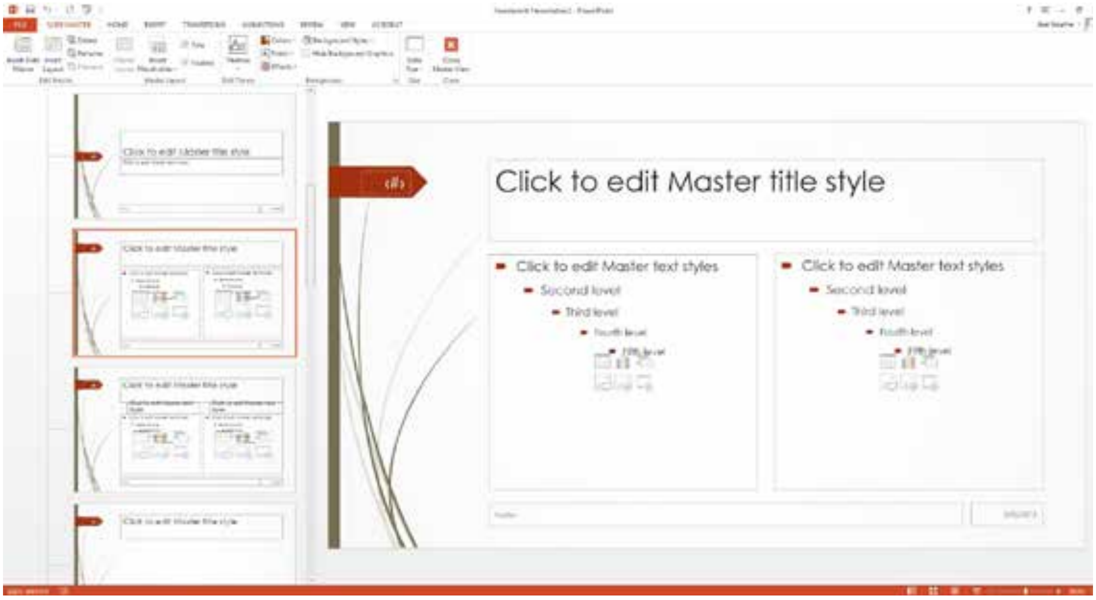


Apply a style

Once you have added the content to your presentation, you can apply a style. This will ensure the format is consistent throughout the whole presentation.

To apply a style, use the **Slide Master.** The **Slide Master** is similar to a template. It allows you to choose a style and format the text. These choices will be reflected throughout the whole presentation.

You can also modify the header and footer on the **Slide Master** to include text, slide numbers and the date/time. There are placeholders for each of these elements.

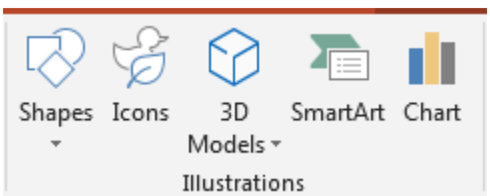


Adding graphics and illustrations

Graphics can be included in your presentation by selecting the **Insert** tab and choosing from the **Images** and **Illustrations** groupings.

You can also use a feature called SmartArt to include graphics in your presentation. A SmartArt graphic is a visual representation of your information that you can create quickly and easily, choosing from among many different layouts, to effectively communicate your message or ideas. For example, you can insert hierarchical charts, pyramids or arrows with text.

To add an illustration, go to the **Insert** tab and click **SmartArt**.

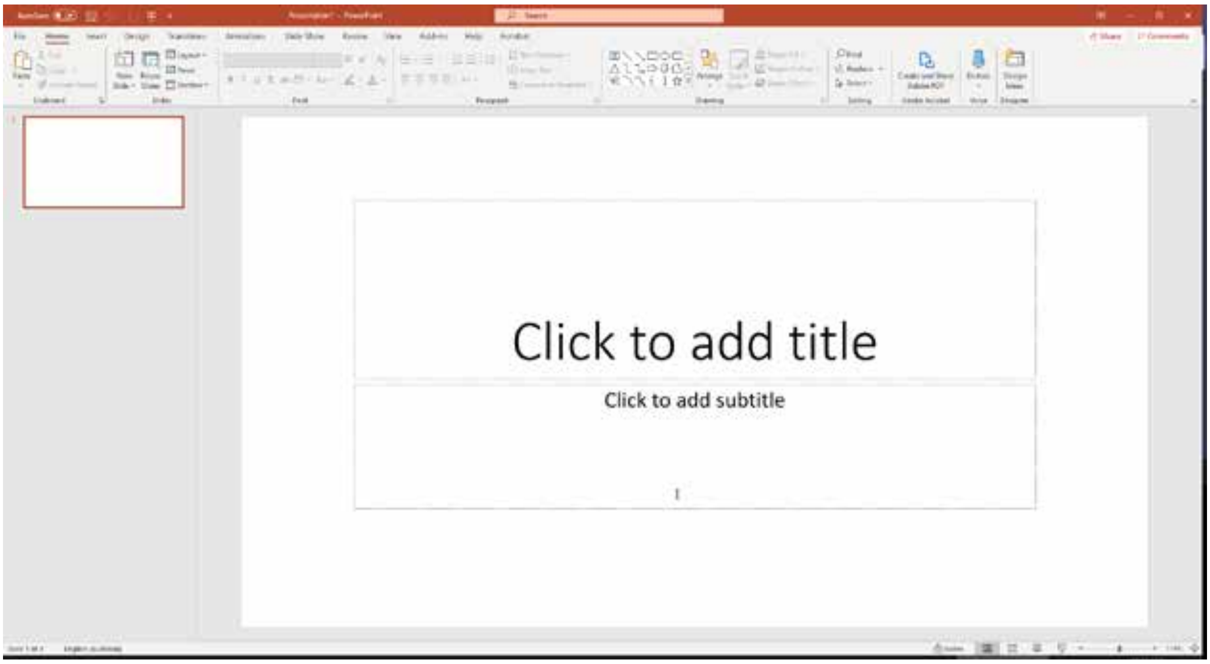


In the dialog box, click the type and layout you want. You can enter your text either by clicking in a shape in your SmartArt graphic and typing your text in directly or by opening the **Text Pane** from the **Design** tab under SmartArt Tools. The text you enter for each bullet point will appear in different parts of your SmartArt graphic.

Practice Task 8

Part A: Create a PowerPoint slideshow

1. Open a blank presentation in PowerPoint. Select a layout for your slide by selecting the **Layout** drop-down menu in the **Home** tab. The option below is for a title and subtitle to be used.
2. To add content, simply click inside the placeholder (rectangular box) and enter the text you want.



3. To add additional slides that you need for your presentation, click **New Slide** in the **Home** tab.
4. To style a slide, select the Design tab from the ribbon and choose the slide style best suited to your organisation and the content.
5. Save your presentation using a suitable name.

Part B: Add content to your presentation.

1. Open your presentation and select the **Home** tab. Select the title slide. Click inside the placeholders and add a title and subtitle.
2. If you have chosen to use a title page with a graphic, select a suitable graphic via the **Insert** tab. There are various options available for inserting images and graphics. For example, you can select the **Pictures** icon to insert a picture saved on your computer or click **Online Pictures** to search for particular types of pictures.
3. Go to each of your slides by clicking on the thumbnails and add the content. You might also like to insert a graph by click using the **Chart** icon or format content by clicking **SmartArt** and

selecting from the options.

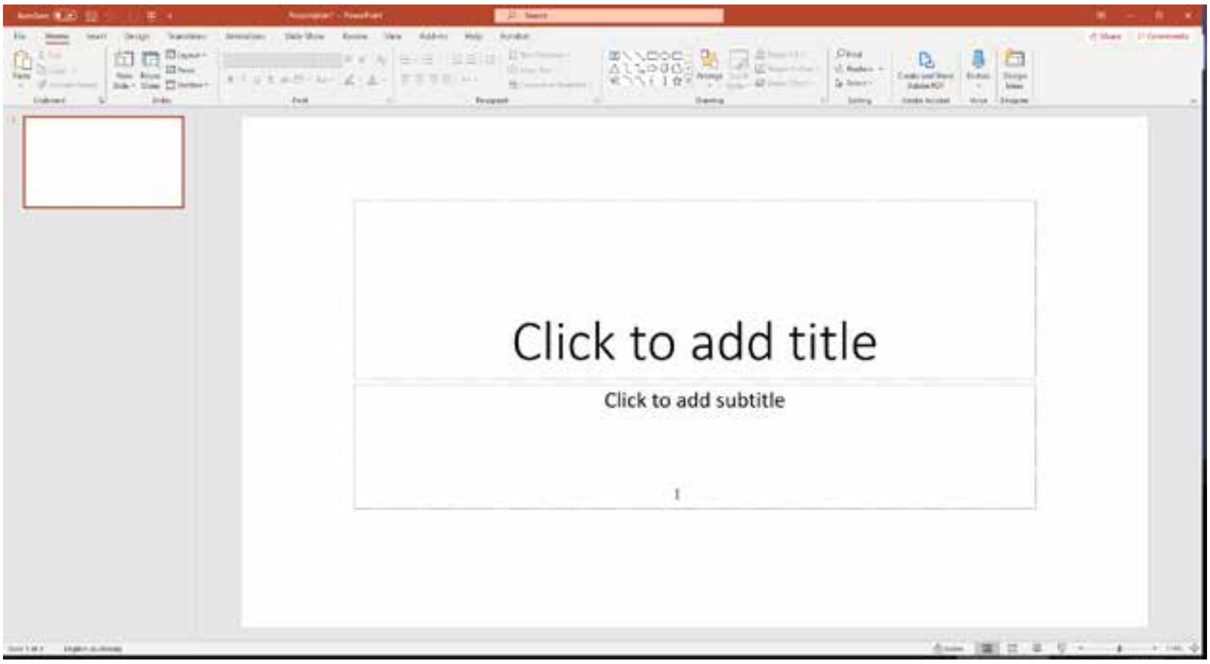
4. View your presentation by going to the **Slide Show** tab, then click **From Beginning**. In this view you can see the slides as they will appear in your presentation. To move from slide to slide, you can press **Enter**, the **Spacebar** or an arrow key, or simply left-click your mouse.
5. If you want to change the sequence of your slides, click **View**, then **Slide Sorter**. This view allows you to see all your slides at once. You can click on and drag slides into a different sequence.
6. Save your presentation.

Here is an example of a slide displaying a title, content, graphics and a standard design template.

Part C: Apply a consistent style to the presentation.

1. Select the **View** tab, then click **Slide Master**. You should see a screen similar to the following.
2. Inside the placeholder, click on the top placeholder to add a heading. This will be the heading on all subsequent slides. However, you can still edit it if necessary when you switch to Normal view. Choose formatting to suit your title from the **Format** tab. By hovering over different WordArt styles, you can see the impact the style will have on your title. Select a WordArt style.
3. Click on the second placeholder and add text. Choose formatting to suit your text from the formatting toolbar. If you have written different levels of text, choose formatting to suit all levels.
4. To view your choices, select the **View** tab, then select **Normal**. If you are unhappy with your choices, go back and alter them.
5. To add footer information, select the **Insert** tab, then select **Header & Footer**. Tick the **Date and time** checkbox. The **Update automatically** button will be selected. This will make sure that the date and time on your presentation is always correct.
6. Tick the **Footer** checkbox and click inside the box to add a suitable footer for your presentation. Click **Apply to All**.
7. View your new style by going to the **Slide Show** tab.

8. To add additional slides that you need for your presentation, click **New Slide in the Home** tab.
9. To style a slide, select the **Design** tab from the ribbon and choose the slide style best suited to your organisation and the content.
10. Save your presentation using a suitable name.



2C Use relevant help functions

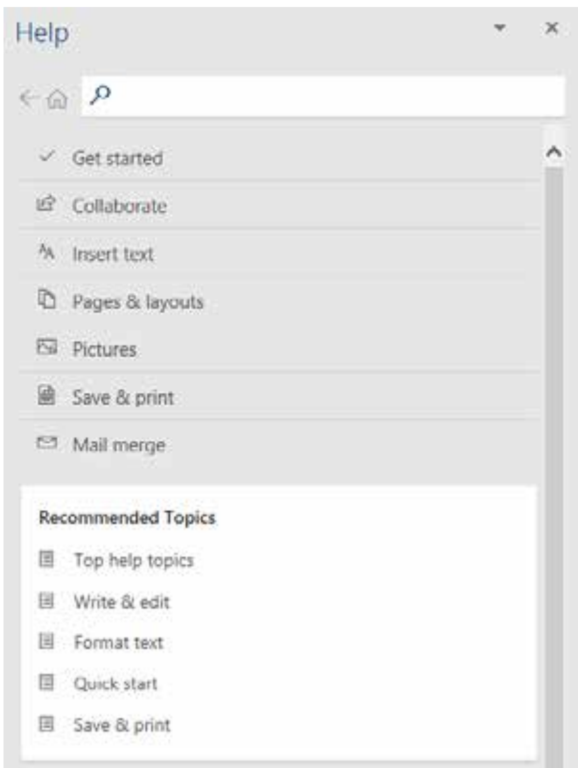
When using business technology and applications, it is likely you will need to access help to overcome problems.

The business equipment you use might fail or the software you are using may not seem to be working correctly. Whatever the problem, it helps to have a plan in place for dealing with the unexpected. Organisations deal with difficulties in a number of different ways. They might have manuals or training booklets you can refer to. Some may even have a helpdesk to assist employees.

Using the help function

Full access to the help function requires you to be connected to the internet. It is possible, however, to access standard help functions offline. To use this function, search for what you want help with in the search bar.

You can also press F1 on the keyboard to access the help facility.



Taking screenshots

It can be helpful to take a screenshot to communicate the issue you are having to someone else.

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

To take a screenshot, press the print screen icon on your keyboard. This may be displayed as an abbreviation, such as 'PrtScn'. Then 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.

Training booklets and manuals

Manuals explain the features of the equipment and provide step-by-step instructions for general use in a paper-based or online format.

You should receive some training when you first start a job, but it is important the training does not stop there. You should try to keep up to date with technology and software application updates. An easy way to do this is to access up-to-date training on software applications. These courses usually provide a comprehensive set of instructions or booklets based on the training and these are worth keeping for future reference.

Most equipment and software come with a user manual.

Manuals include information about:
▪ functions ▪ maintenance ▪ use ▪ relevant WHS issues.

Websites

There are many websites with information about Microsoft Office applications.

These usually contain frequently asked questions (FAQs) and give solutions to common problems. Typing a question into a search engine such as Google or Bing can often lead you to an answer to your question about using a software application. You can also download updates, tools and any 'fixes' Microsoft has developed for its software problems.

Here are sources of information to help you use software applications:

Help function	Try pressing the F1 help function in the Microsoft Office software applications. This option provides you with an index of information to help solve any problems you may be experiencing with the software. You can open this function by going to the File menu, selecting Help and Microsoft Office Help.
Microsoft support	This is Microsoft's main site for finding help with Microsoft products. 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 Office programs.
Microsoft office	This site provides general information about Office 2013 as well as resources for all Office applications. You can find out about installing Office 2013 and updating all Office products. The site also has a number of other useful tips and tricks.

Practice Task 9

Part A

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

Case study

One of Anna's duties as personal assistant to the manager of a large organisation is to produce business documents using Microsoft Office applications. While producing documents, Anna often needs to use the F1 help function to find answers to questions about the software.

Sometimes Anna experiences software function problems that cannot be solved using F1, so she uses Microsoft's support websites to find solutions. There are also paper-based Microsoft Office manuals available in her workplace. She has copied the pages that she needs most frequently and keeps them in a 'Help' folder on her desk.

Question 1

Anna sometimes has software functionality problems. Suggest two places she can go for help.

Question 2

Outline the steps you could take if you experience software problems while producing a document.

Question 3

Create a Word document and input the information in the text box below.

Information for Word doc

1. To get to the Google homepage, select this link: www.google.com
2. Here is the text to place inside a text box.
3. Watch this statement change as I do a search and replace
4. The number of words in this document is

Use the Help function in Word to assist you to do the following actions to the Word document:

1. In Point 1 of the information, turn the Google address into a hyperlink.
2. Place the text in Point 2 into a text box.
3. Use the Search and Replace function to replace the word 'statement' with the word 'sentence'.
4. Count the number of words in the document and add the number at the end of Point 4.

Summary

- Software applications can be identified by their icons.
- There are file types associated with specific software applications.
- Typing, copy and pasting, and inserting are the three main methods for inputting information or data.
- Information and data should be checked for accuracy, errors, and to ensure it meets task and organisational requirements.
- There are several software functions that can be used to change the formatting in word-processed documents, spreadsheets and PowerPoint slides.
- Online help files, manuals and the internet can be used to overcome simple issues when using a software application.

Learning Checkpoint 2

Input and process information or data

Part A

1. Sarah receives the following instruction from her supervisor: "Sarah, here are my handwritten notes from yesterday's managers' meeting. Can you please type these up using the minutes template which you can find in the templates folder?"
   a) Which software will Sarah use to create this document?

   b) What file type will the template be saved as?

Part B

1. What method can be used to enter information or data in each of the following scenarios?
   a) Converting handwritten notes to go into a document

   b) Adding a photo to a report

   c) Incorporating a table from another document into a report

   d) Adding a hardcopy quote as an appendix to a report

2. Create a Word document titled OfficeTips using the information below.
   Make sure you:
   - use a variety of formatting options, such as bullets and numbering, headings, alignment, etc.
   - use help facilities to assist you if needed.
   - proofread and edit your document for spelling and grammatical errors and consistent style.
   - save your document as OfficeTips.

Information for OfficeTips document

Tips for working in an office

Tip: Six Traits of Leeders

Studies have indicated six traits that are consistently associated with leedership:

Ambition & energy

Desire to lead

Honesty and integraty

Self-confedence

Inteligence

Job-relavant knowledge

Tip: Deeling With Change

Change can be difficult for many of us. For example, if you've been transferred to a new department or given a new supervisor, you will need to make some adjustments. Try to understand the change and how it is making you feel. Look for coping mechanisms that address your feelings. For example if you feel you might be lonely in a new department, try to find ways to help others and make some new friends.

Tip/Help Others Fit In
How can new workers be made to feel welcome on the job? It takes more than a tour of the office and an employee orientation. Find ways to include and value new team members. Invite them to sit in on planning and staff meetings, look for their input on new projects, ask them to serve on committees. Valuing employees helps strengthen their commitment to the team

Tip: Blame vs. Solutions
When things go wrong on the job, ressist the urge to start placing blame, and pointing fingers. Managment is usually more interested in damage control. So, add to your personal value and professional image by presenting viable solutions rather than spending a lot of time dwelling on the cause Caution Don't, ignore the cause completely, as the solution may lie in understanding why the problem occured to begin with

Tip Take Days Off
Be sure you are familliar with your employers' vacation and time off policy. Yoou'll want to understand how time off acrues or when you are eligible for time off, so that you won't plan a holiday and then find out you're not elligible

Tip. Be Selfish at Work
Unselfish co-workers contribute to effectiveness and productivity in the workplace. By putting team goals and objectives before personal interests, teemplayers decrease their value to the team and at the same time boost their own self-estem and confedence

3. Recreate the following spreadsheet by following the steps 1–7 below the spreadsheet.

	A	B	C	D	E	F
1		**Monday**	**Tuesday**	**Wednesday**	**Thursday**	**Friday**
2		34	23	43	45	54
3		67	45	34	67	12
4		54	23	67	80	12
5		67	36	90	69	90
6		34	67	13	12	45
7		69	89	45	10	87
8		12	40	65	34	12
9		90	32	10	60	23
10		23	90	27	13	45
11	**Daily totals**					
12	**Weekly total**					

1. Format the labels to make data input easier.
2. Add borders and light shading around cells A11–F11. Format cells A11–F11 as **Bold**.
3. Merge cells B12–F12, format as **Bold** and align left.
4. Add borders and darker shading around cells A12–F12.
5. In cell B11, write a formula that calculates Monday's totals. Use a calculator to check that the formula gives the correct amount. Use **Fill** to apply the formula to each daily total.
6. In cell B12, write a formula that calculates the weekly total. Use a calculator to check that the formula is correct.
7. Print preview your spreadsheet. Adjust the alignments of your labels and values until you are satisfied with how your spreadsheet looks. Print out your spreadsheet.

4. Which of the following formatting functions are available in PowerPoint? Tick all that apply.

◯ Import information from other applications such as Microsoft Word or Excel.

◯ Insert images or photographs.

◯ Use a slide master to add consistency.

◯ Create handouts to go with your presentation.

◯ Select a song from a range of PowerPoint music options.

◯ Calculate the number of people attending the slideshow.

Part C

1. If you were having trouble using Microsoft Word to create a table in a document you were creating, what are two sources of online help you could use?

2. Suggest three ways you could overcome a problem with a spreadsheet you are unable to print.

Topic 3 | Finalise and store document

3A Review, edit and prepare final information or data for storage

3B Name and store document and exit application

3A Review, edit and prepare final information or data for storage

In order to finalise your business document, you need to review, edit and prepare the information or data for storage in accordance with organisational and task requirements.

There are several steps that should be taken to finalise the data in your business document and make it ready for storage. These include:

- reviewing the information or data against task and organisational requirements
- proofreading and editing the information or data
- preparing the document for storage.

Reviewing the document

Have you checked that the document meets task and organisational requirements?

It is your responsibility to ensure that the document you have produced meets the task and organisational requirements.

To review your work, first look at the task requirements and check that you have completed every aspect of the task. Using a checklist like the one shown below will help you to complete this task.

Next, check your work against the organisational requirements. Ask yourself these questions:

- Have you used the correct template?
- Have you followed the style guide?
- Do all images, tables etc. have correct labels or captions?
- How does your document compare to others produced?

Reviewing your work will give you the confidence that you have completed the task correctly.

To review the document, you should ask yourself:
• Have I included all the information or data specified in the task? • Has the information or data been presented in accordance with organisational requirements? • Is the information or data correct and complete? • Do I need to get the information or data checked before finalising the document?

Proofreading and editing the document

A final document should be proofread and edited before it is distributed to your audience.

A final proofread and edit ensures the quality of the document you have produced.

This means checking that the final document is the same as any draft document you were given to copy. For example, your manager may give you a handwritten letter to word process. You will need to check your finished document against the letter to make sure you have copied it correctly.

You must also check for any spelling or grammatical mistakes. Most software applications include a spell and grammar check function. In Microsoft Office, the software can be set to a default dictionary, which is usually based on the language and country of usage; for example, English (Australia). If you make a spelling error, a red wavy line will appear underneath the word. If you make a grammatical error, either a brown dotted line or a double blue line will appear underneath the error.

Be aware that an electronic spelling and grammar checker will not always pick up words that are used inappropriately (such as using 'there' instead of 'their'), so it is best to also proofread your document. You will need to use your discretion when deciding whether the suggested option is the best (or even correct!) option.

Consider the following when proofreading a final document:

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 spelt in different ways; for example, American and Australian spellings of words such as organize/organise. Check your organisation's style manual or ask your manager if you are unsure.
Grammar	Grammar and punctuation suggestions made by software applications are not always correct. Check them yourself before accepting the suggested change.
Style	Style should be consistent throughout the document. Make sure headers and footers are correct, and that spacing is consistent throughout. Check your organisation's style manual or ask your manager if you are unsure.
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 numerical data into a document.

As you proofread and identify mistakes such as spelling, grammar or style, edit the document to remove the mistakes.

A checklist like the one shown below can assist you to complete the proofread and edit successfully.

Once you've reviewed the information or data and are satisfied it is final, you should edit the document to ensure:
▪ it is free from spelling and grammar errors ▪ the data is factually correct ▪ the formatting and styles are consistent ▪ the document meets both task and organisational requirements.

Preparing document for storage

Many organisations have their own requirements on how files should be named and stored.

Always check if an organisation has certain requirements for naming and saving your files to its final location.

When naming and saving a file consider what format the final file should be in. For example, you may have created a Word document, but the task requires your final file to be provided to others as a pdf. In this situation your final file will be saved as a Word doc and as a pdf.

Documents you create may be confidential and thus require protection. Many software applications include a function for creating password protection on individual documents. When you password-protect a document, you should write the password down in a secure place or check what password should be used to secure the document.

Before you save and store the final document, check if you need to:
▪ apply any password protection to the file ▪ have a supervisor sign off on the file ▪ save the file in a particular file format.

Practice Task 10

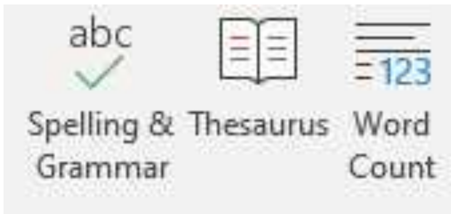
Question 1

For the following exercise, use the Spelling & Grammar function to check spelling and grammar as you type.

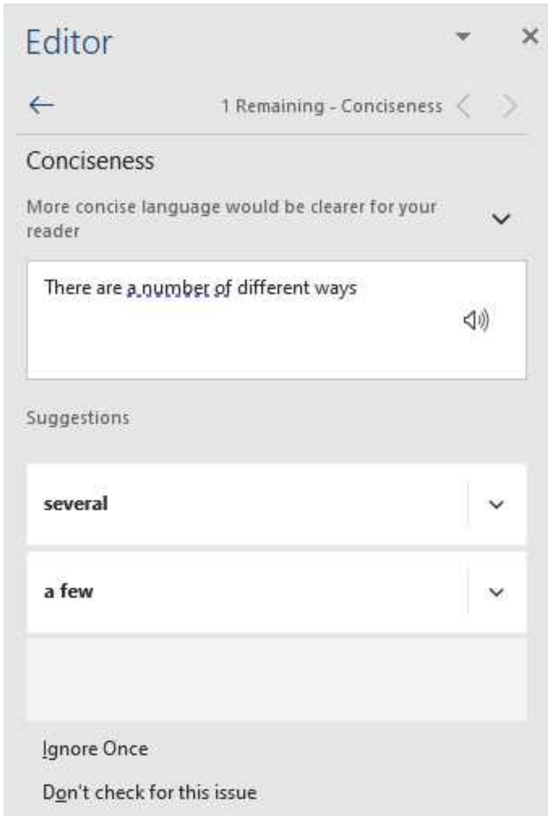
1. Open your MyLetter document created in Task 2.
2. In the File tab, select the Options button and then select the Proofing tab.
3. Ensure that the following are ticked:
    - Check spelling as you type
    - Mark grammar errors as you type

   Click **OK**.
4. Enter more text into your MyLetter document. Look out for lines underneath your text that indicate an error in spelling or grammar.

   To do a spell check, go to the **Review** tab and select **Spelling & Grammar**.

   The spelling and grammar dialogue box will appear. The spelling and grammar function will then highlight errors and suggest spelling or grammatical changes. Select the most appropriate choice for each option and click **Change**. You can also **Add** or **Ignore** words that the spell checker does not recognise.

5. Rename your MyLetter document by including first name and date in the file name.
6. Save the file as a Word document and as a pdf.
7. Store the document in an appropriate folder on your computer or to a location directed by your trainer.

3B Name and store document and exit application

You need to know your organisation's procedures for naming and storing documents and for closing applications carefully to avoid damage or data loss.

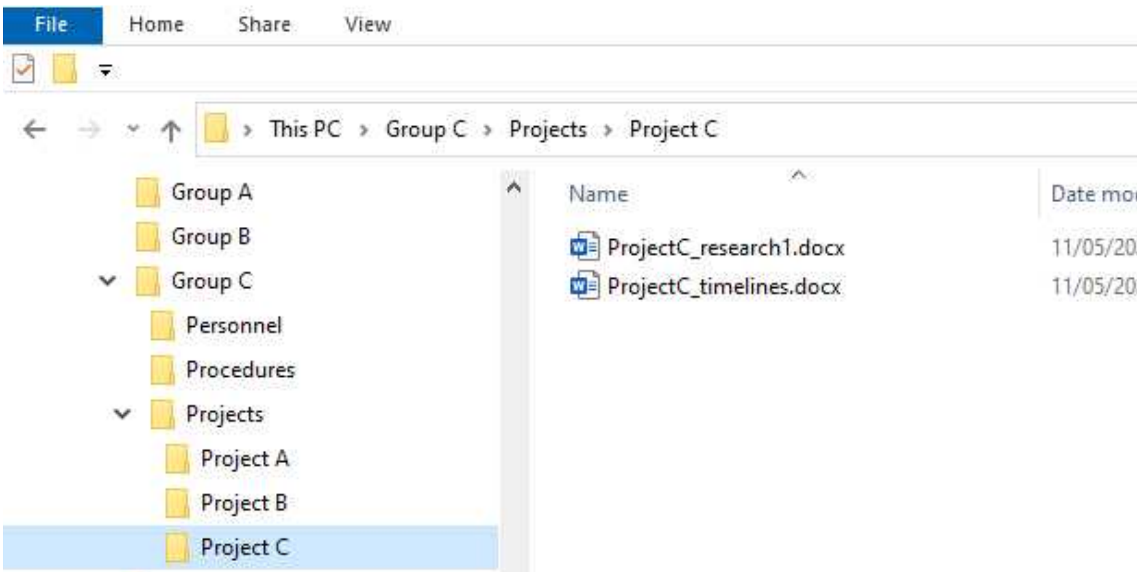
Folder structure and naming standards

These standards are needed to allow staff to set up folders quickly and easily.

All organisations have policies and procedures for naming and storing documents. Documents can be stored in soft or hard copy. This means they can be stored electronically in a computer or printed and stored in a filing cabinet.

Some organisations have strict naming standards that must be adhered to; for example, all project files must start with 'PRO_'. Another example is using client reference numbers, rather than names. If there are many clients with the same surname, a unique reference number will avoid confusion. You should always find out the naming standards for folders and files of the workplace and follow these. If you are unsure, ask a supervisor or appropriate person.

Files also need to be saved in folders. Folders have a treelike structure that branches from a parent directory to sub-folders in a hierarchical structure.



In the example structure above, the server has three folders for three separate work groups:

- Group A

- Group B
- Group C.

Group C has three major folders:

  - Personnel
  - Procedures
  - Projects.

  The Projects folder includes:

    - Project A
    - Project B
    - Project C.

    Project C has two documents (or files):

      - ProjectC_research1.docx
      - ProjectC_timelines.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 to follow is: C:\GroupC\Projects\ProjectC\ProjectC_timelines.docx

Hard- and soft-copy storage

Files can be stored in soft or hard copy; this means that they can be stored electronically in a computer or in a paper-based form in a filing cabinet.

Many organisations prefer to store information digitally. Paper reports can be easily torn, misfiled or accidentally disposed of, and physical storage can also be expensive.

Digital storage saves on paper and space. Another advantage of storing reports digitally is that powerful databases can be used to search the stored information. Databases enable you to find specific information that would be much harder to find by searching through hard copies of reports.

Databases also provide management with powerful metrics and reporting tools. For example, statistical information can be gathered from a database, enabling detailed reports to be produced.

Documents that are stored digitally can also be stored in hard copy. This safeguards against a computer system failure. Hard-copy storage requires space and a filing system that uses consistent, simple and meaningful names, similar to digital storage.

Document back up

Organisations of all sizes can suffer significant losses if they lose documents that have not been backed up. Scheduled backups at regular intervals are recommended. Most organisational folders and files are stored on a server and copied to a backup server. In medium to large organisations, cloud computing is becoming more common as a location for backed-up files.

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

Exit applications

After creating or modifying an electronic document, you need to exit the software application without causing damage or loss to the data.

To exit an application, first ensure your file has been saved. Then close the file itself by clicking on **File** and choosing **Close**.

You can now safely exit the application by clicking on the X icon in the top right-hand corner of the application.

Practice Task 11

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

Case study

Matt retired after working for an organisation for 10 years. At work, he was responsible for two areas: projects and accounts. The day after he retired, somebody urgently needed a file that Matt had created and stored. The file contained vital accounting information. The organisation discovered that Matt had saved over 500 files in a variety of folders and the file couldn't be located. The folders had names such as Folder 1 and Folder 2, and the files had names such as august1.docx and march2.docx.

Question 1

Briefly outline why Matt's folder and file naming system failed.

Question 2

Matt was responsible for two areas. What folder names could he have used to ensure files were placed in the correct folders?

Question 3

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

Question 4

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

Summary

- Documents produced need to adhere to organisational and task requirements.
- To ensure the production of quality products, it is important to thoroughly review and edit the final document.
- Proofreading should be carried out carefully to ensure the document is checked and amended for accuracy of information.
- Developing your skills in proofing and editing will help in the production of error-free documents.
- Following appropriate file-naming and storage conventions makes it easier to locate documents.
- You need to understand an organisation's policies and procedures about saving and storing spreadsheets.

Learning Checkpoint 3
Finalise and store document

Part A

1. Briefly outline what it means to edit a document.

2. What does 'proofread a document' mean?

3. When checking for accuracy, what are three details you might need to check?

4. Why is a consistent layout important?

5. Why do you need to follow organisational requirements when saving and naming files?

6. Suggest an appropriate file name for a sales letter to Ms Ha Nguyen (customer no. 33487).

7. Outline how to exit Word safely (without losing data).

Part B

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

Case study

Lauren has recently commenced work as a receptionist for a small hotel. Her duties include word processing tasks, such as formatting letters and short reports. Lauren has been asked to prepare the minutes of the managers' meeting. Actions that each manager has agreed to and due dates for their completion need to be highlighted and summarised. Lauren has been asked to complete the final document by the end of the day and distribute it to the managers. There is a shared network system that all managers and Lauren have access to.

1. What type of layout should Lauren use to prepare the minutes? What can she do to ensure that it is consistent with the layout of previous minutes?

2. What should Lauren do to check the final document?

3. Where should Lauren save the document? What should she name it so it is easy to access?