BSBITU303
Design and produce text documents

Release 1

Learner guide

Aspire
learning resources

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Design and produce text documents

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Learner guide

Aspire Version 1.1

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Contents

Before you begin

This learner guide is based on the unit of competency *BSBITU303 Design and produce text documents*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: www.training.gov.au.

How to work through this learner guide

This learner guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the learner guide you need to read, and which practice tasks and learning checkpoints you need to complete. The features of this learner guide are detailed in the following table.

Feature of the learner guide	How you can use each feature
Learning content	Read each topic in this learner guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
Examples and case studies	Examples of completed documents that may be used in a workplace are included in this learner guide. You can use these examples as models to help you complete practice tasks and learning checkpoints. Case studies highlight learning points and provide realistic examples of workplace situations.
Practice tasks	Practice tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
Video clips	Where QR codes appear, learners can use smartphones and other devices to access video clips relating to the content. For information about how to download a QR reader app or accessing video on your device, please visit our website: www.aspirelr.com.au/help
Summary	Key learning points are provided at the end of each topic.
Learning checkpoints	There is a learning checkpoint at the end of each topic. Your trainer will tell you which learning checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.

Foundation skills

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

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

Foundation skill area	Foundation skill description
Reading	• Recognises and interprets textual information from a range of sources to determine and adhere to requirements
Writing	• Develops documents using required format, accurate spelling and grammar and terminology specific to requirements • Organises content to support purpose and audience of material using clear and logical language
Oral communication	• Uses specific and direct language, and listening and questioning techniques to clarify requirements
Navigate the world of work	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role
Interact with others	• Collaborates with others to achieve joint outcomes
Get the work done	• Uses advanced features within applications to address routine and complex work tasks

What do you already know?

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

Topic	Key outcome	Rate your confidence in each section
Topic 1 Prepare to produce word-processed documents	1A Use safe work practices	❑ Confident ❑ Basic understanding ❑ Not confident
	1B Identify and clarify the purpose, audience and presentation requirements of a document	❑ Confident ❑ Basic understanding ❑ Not confident
	1C Identify requirements to ensure consistency of style and image	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 2 Design word-processed documents	2A Design the structure and layout of a document	❑ Confident ❑ Basic understanding ❑ Not confident
	2B Design the document to enhance readability and appearance	❑ Confident ❑ Basic understanding ❑ Not confident
	2C Ensure consistency of design and layout	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 3 Add tables and other data	3A Insert a standard table into a document	❑ Confident ❑ Basic understanding ❑ Not confident
	3B Insert and delete columns and rows	❑ Confident ❑ Basic understanding ❑ Not confident
	3C Insert images and other data	❑ Confident ❑ Basic understanding ❑ Not confident

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Topic	Key outcome	Rate your confidence in each section
Topic 4 Produce text documents	4A Use advanced software functions	❏ Confident ❏ Basic understanding ❏ Not confident
	4B Enter, import and edit text and other data	❏ Confident ❏ Basic understanding ❏ Not confident
	4C Preview, adjust and print documents	❏ Confident ❏ Basic understanding ❏ Not confident
	4D Name and store text documents and exit the application safely	❏ Confident ❏ Basic understanding ❏ Not confident
	4E Prepare text documents within designated time lines	❏ Confident ❏ Basic understanding ❏ Not confident
	4F Overcome problems with document design and production	❏ Confident ❏ Basic understanding ❏ Not confident

Topic 1
Prepare to produce word-processed documents

This topic will take you through the process of preparing to produce word-processed documents. Careful preparation is integral to the level of success of any activity. Imagine cooking a cake with no recipe and part way through discovering you have no eggs! Likewise in business, planning, research and gathering tools together will ensure a timely and successful outcome.

Preparation begins with a safe work environment and knowledge of good work practices. This topic introduces the value of policies and procedures in an organisation and the communication skills that ensure you are aware of your workplace's expectations.

In this topic you will learn how to:

1A   Use safe work practices

1B   Identify and clarify the purpose, audience and presentation requirements of a document

1C   Identify requirements to ensure consistency of style and image

1A | Use safe work practices

Workplace safety is everyone's responsibility. Employers and employees must make an active contribution to ensuring their workplace is safe. Hazards need to be identified and risks assessed to reduce injury in the workplace. If you are working at a computer for an extended period each day, your workstation must be comfortable and designed for you to 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 time to stand up and stretch.

Another consideration in the workplace is to use resource conservation techniques to prevent wastage. Most organisations require staff to follow resource-saving procedures such as turning off lights in unused rooms and recycling paper. You need to be aware of any conservation efforts made by your organisation.

Workplace safety legislative requirements

All work health and safety (WHS) legislation requires employers to provide a safe workplace and adequate training and supervision, while controlling workplace hazards and risks. You must work in line with legislative requirements, regulations, Australian and industry standards, and the relevant codes of practice.

WHS legislation describes the legal requirements for ensuring workplaces are safe and healthy, 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 participation in maintaining WHS
- providing rehabilitation and maximum recovery for injured workers.

WHS policy

All workplaces in Australia are required to have a WHS policy that describes the organisation's responsibility for the health and safety of its employees. The policy should include the organisation's goals and objectives regarding WHS and a general set of guidelines related to health and safety in the workplace.

The WHS policy will help you fulfil your duty of care as a worker for the organisation.

WHS procedures

WHS procedures are instructions developed to ensure all employees work safely and effectively. In the context of working in an office and using a computer workstation, the following information should be contained in an organisation's WHS procedures.

Information contained in WHS procedures includes:

- 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 and first-aid officers.

WHS regulations

The WHS legislation of each state or territory is supported by regulations and codes of practice. The WHS regulations support the legislation by outlining specific workplace health and safety requirements that must be addressed.

The Model WHS regulations, which provide a framework that most states and territories have adopted, have specific requirements for hazardous manual tasks that must be addressed. These requirements are summarised below.

Manage risk

A person conducting a business or undertaking must manage risks to health and safety relating to a musculoskeletal disorder associated with a hazardous manual task, in accordance with guidelines for managing risks to health and safety.

Control measures

In determining the control measures to implement, the person conducting the business or undertaking must have regard to all relevant matters that may contribute to a musculoskeletal disorder, including:

- postures, movements, forces and vibration relating to the hazardous manual task
- the duration and frequency of the hazardous manual task
- workplace environmental conditions that may affect the hazardous manual task or the worker performing it
- the design of the work area
- the layout of the workplace
- the systems of work used
- the nature, size, weight or number of persons, animals or things involved in carrying out the hazardous manual task.

Code of practice: hazardous manual tasks

The WHS regulations determine that it is a legal requirement for the person conducting a business or undertaking (PCBU) and workers to address hazardous manual tasks in the workplace. A PCBU has a broad definition that includes both employers and supervisors.

The code of practice for hazardous manual tasks was developed to provide guidance on how to manage risks associated with those manual tasks with the potential to cause musculoskeletal disorders (MSDs).

A PCBU must consult with workers, so far as it is reasonably practical, to develop their own set of procedures to manage the risk of MSDs.

The hazardous manual tasks code of practice helps PCBUs and workers to:

- identify hazardous manual tasks
- assess the risks
- control the risks
- review the control measures.

Musculoskeletal disorders

MSDs come about in two main ways:

- Gradual wear and tear to joints, ligaments, muscles and inter-vertebral discs through repeated or continuous use of the same body parts, including static body positions
- Sudden damage caused by strenuous activity or unexpected movements, such as when loads being handled move or change position suddenly

The repetitive movements and sustained body position associated with entering data into a computer is regarded as a hazardous manual task and puts the operator at risk of developing an MSD.

MSDs may include conditions such as:

- sprains and strains of muscles, ligaments and tendons
- back injuries, including damage to the muscles, tendons, ligaments, spinal discs, nerves, joints and bones
- joint and bone injuries or degeneration, including injuries to the shoulder, elbow, wrist, hip, knee, ankle, hands and feet
- nerve injuries or compression (e.g. carpal tunnel syndrome)
- muscular and vascular disorders as a result of hand-arm vibration
- soft tissue hernias
- chronic pain.

Standard precautions

Your workplace may need you to use standard precautions, particularly work practices related to the prevention of repetitive strain injuries (RSIs). These include ergonomic practices, workstation design, enforced breaks and exercise routines.

Workers in an office environment follow standard precautions when using a computer workstation. However, research on sitting has demonstrated that other precautions also need to be considered, such as the use of standing workstations, to ensure that injuries are prevented. It is important that you carefully follow any standard precautions that are prescribed for your workplace.

Equipment and systems safety checks

An important part of your daily work routine is to check the various systems and equipment you will use during the day to make sure they are in correct working order. Your workplace policies and procedures should include the steps to follow. You may need to perform this procedure at the start of your working day or at specified intervals during the day.

Workstation safety procedure/checklist:

- Seat is positioned in front of your computer and you can reach your keyboard comfortably.
- Computer monitor is positioned out of direct sunlight and at the correct height.

- Environment is dust-free as dust can affect the monitor or central processing unit of a computer.

- Cables are secured so no-one trips over them.

- Blinds and window coverings are used to reduce glare and heat at your workstation.

- Temperatures don't exceed 26°C and humidity is between 40 and 60 per cent.

Use ergonomic practices in the workplace

The aim of ergonomics is to reduce the risk of accidents, injury and ill health 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.

Set up your workstation

A workstation includes a computer, screen, keyboard, mouse, desk and chair. 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. Below are some guidelines for setting up your workstation to be ergonomically efficient.

Chair

Adjust your chair height so that your feet are flat on the floor, your thighs are horizontal and your lower legs are vertical to the floor.

Adjust the backrest by raising it to the maximum height and then lower it until it fits the curve of your lower back. If this is not comfortable, lower it another couple of centimetres. Continue this until a comfortable position is found. The backrest should support your lower back.

The backrest may also be adjusted backwards and forwards. When seated in your usual working position, move the backrest until it exerts a gentle pressure on your lower back. Make sure there is at least two centimetres of space between the front of the seat and the back of your knees. Armrests should be positioned so that they do not interfere with carrying out your tasks.

Desk

When you sit at your desk, the surface should be just below your elbow height. If your desk is not height-adjustable, try to raise your chair so you are sitting at the correct height, and use a footrest to make up the difference. If your desk is too low, you may be able to extend the legs. You should have plenty of leg space underneath your desk. Don't clutter the space with bags and bins, as your legs may become cramped and your posture twisted. Position any equipment or materials you use so that you can reach them easily without twisting. For example, stationery items you frequently use should go in the top desk drawer, and your keyboard and screen should sit directly in front of you to avoid having to angle or twist your body.

Keyboard

The angle of your keyboard can be adjusted to suit your comfort level by moving the supports underneath it. Place the keyboard as close as possible to the front of your desk. Don't place documents between yourself and the keyboard, as stretching will eventually cause muscle strain in your arms, shoulders and neck. While typing it is best not to rest your wrists, as they should not be bent up, down, or to the side. The knuckle, wrist and top of the forearm should form a straight line. Wrist supports or rests give you a place to rest your hands only when pausing from typing, not while you are typing. Do not pound the keys; use a light touch. Leave enough room on your desk to put the keyboard out of the way when you are not using it.

Mouse

Place the mouse and mouse mat directly beside your keyboard on the side you prefer. If you use the mouse frequently, you could try to alternate sides. You will be surprised at how easy this becomes with practice. Your wrist should be straight, and the desk should support the weight of your wrist, not your arm. Try to keep your wrist flat and rest your fingers on the mouse between clicks. Hold the mouse lightly. Don't hold onto the mouse when you are not using it.

Screen

Once you have adjusted your chair and desk, you can position your screen. Adjust it so that the top of the screen is level with or slightly lower than your eyes. If you can't adjust the screen to the correct height, place the screen on a platform.

The screen should be at least 50 centimetres or an arm's length away from your seated position to minimise radiation exposure; however, you should always adjust the position of the screen to suit you. It is best to position the screen so that you can clearly read the text without leaning forward, twisting your neck, or looking too far upwards. Also take surrounding factors into consideration, such as reflection, glare and shadow, when positioning your screen.

Workstation features

The features of an ergonomic workstation are highlighted in the diagram below. Some features of the workstation may vary depending on the type of computer work being performed. Graphic work may require the use of a pen tool, and multiple monitors are commonly used for a variety of digital work.

Top of screen	The screen angle should be adjustable between 85 and 125 degrees to the horizontal.
Centre of screen	Minimise screen reflection and glare by using an anti-glare filter.
Bottom of screen	Place a document holder beneath or beside the screen at the same viewing distance as the screen.
Top line of sight	The viewing distance should be between 400 mm and 700 mm.
Bottom line of sight	A relaxed viewing angle is approximately 35 degrees.

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Head	Keep your head erect.
Shoulder	Have your upper arms hanging freely.
Elbow	Have your forearms approximately horizontal.
Above knee	Ensure there is clearance between the lower edge of the desk and your legs.
Below knee	Ensure there is clearance between the front edge of the seat and the lower leg.
Footrest	Use a footrest if needed.
Back of chair	The back support should be adjusted to support the small of your back.
Under chair	Adjust the seat height to suit your furniture and equipment.
Chair legs	Use a chair with a five castor base.

Desktop layout
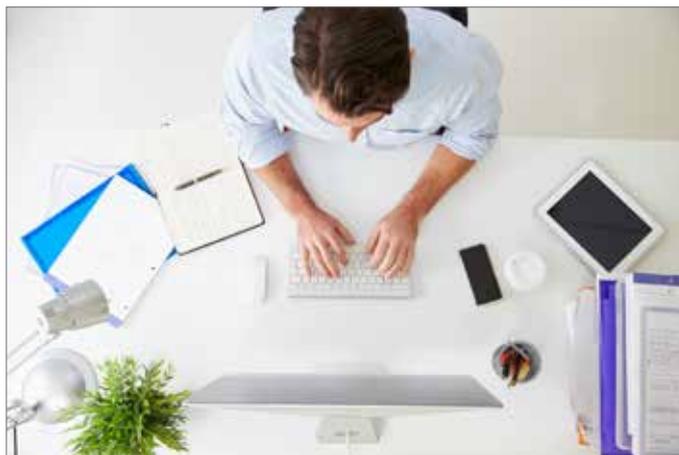
Items on your desk, including equipment and resources, should be arranged within easy reach.

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 – 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. Intermittently used objects, such as your phone, should be out of the way but still within easy reach. Other resources used less frequently, such as in- and out-trays, should be in the outer reach zone.

Adjust your equipment and posture

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 start out very slight, but if you continue to use poor posture they may get worse and become intolerable. They may result in cumulative stress given the constant stress on your muscles, nerves or tendons. When setting up your workstation, you need to 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.

You have already looked at adjusting your screen and chair. There are other office tools that can help your posture. These include the following items.

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 eye focus.

Angle boards

Angle boards allow the user to maintain correct posture when reading, by reducing the angle between the work surface and the vertical posture. Adjustable to a suitable height and angle, these supports 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.

Home office

Communication technology and organisational policies to maintain a sustainable work–life balance are creating opportunities for more flexible working arrangements. This means that more employees are working from home offices or in other remote office locations. Many benefits can be derived from flexible working arrangement for employers and employees, but there is still a responsibility for all parties to make sure that home and remote offices use ergonomic practices and follow WHS requirements.

Hot desking

Hot desking is an office organisation system that is used in some workplaces where workstations are not assigned to an individual worker. Workstations may be used by multiple workers during different time periods or shifts.

The motivation behind hot desking is primarily the cost savings achieved by setting up fewer workstations in workplaces where not all the workers are in the office at the same time, or not in the office for long periods at a time.

Another common adaptation of hot desking is where work stations are assigned to individual workers, but need to be readily available for other workers to access based on daily work requirements, such as a group of people coming together to work on a specific project.

WHS and workplace culture considerations with hot desking

- It is common for workers to want their own space. Consequently, they may tend to choose one location and stick to it.
- It can take extra time each day to set up a work station for ergonomic and work efficiency.
- Personal hygiene needs to be maintained to prevent the spread of germs on keyboards and desk surfaces.
- Workstations need to be tidied appropriately in readiness for the next user. This can also involve some cleaning.

Standing desks

Sitting at a desk for long periods of time has many negative health impacts. It is claimed that the negative effects of prolonged sitting cannot be counteracted by regular exercise and that the only way to eliminate this problem is to avoid sitting as much as possible.

These negative health impacts can be overcome through the use of standing desks. Standing provides a greater opportunity for your body to move and adjust and involves more muscular activity than sitting.

Some of the health benefits from standing include:

- alleviating back pain and other repetitive stress injuries by greater use of core back muscles to support the upper body
- increasing focus, alertness and activity level by releasing restless energy
- reducing the risk of developing cardiovascular disease, diabetes and blood clots, which can be caused by prolonged sitting.
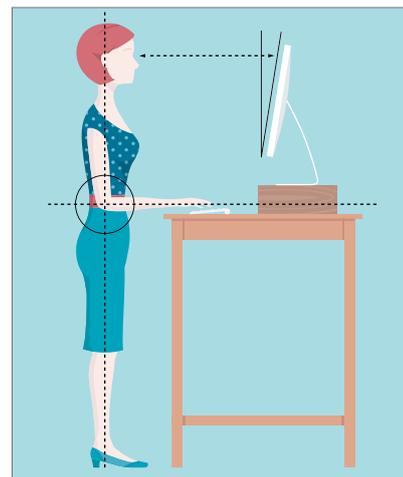
Standing desk ergonomics

Using a standing desk for hours on end requires you to adapt. It is recommended that you start using a standing desk gradually by alternating between sitting and standing. You may experience sore feet, tired legs and fatigue at first. Wear comfortable shoes and use an anti-fatigue floor mat.

An ergonomically designed standing work desk means you can maintain correct posture while working.

> Position arms at 90 degrees when typing/standing.

> Place the computer screen at eye-level and tilting it slightly upwards.

> Place the computer monitor at least an arm's length away.

> Avoid leaning over the desk; keep your body straight.

Monitor environmental factors

Environmental issues in the workplace include lighting, noise control and air quality. If the environment of your workplace is not monitored and controlled, you may suffer from headaches, fatigue, hearing loss or eyestrain.

Light

Good lighting is essential for a safe and hazard-free workplace. You need to see things clearly to work effectively. Simply shifting the screen slightly, adjusting blinds, altering the brightness settings on the screen and using desk lamps can avoid many light hazards. Try to use natural sunlight if the office layout can accommodate this. If not, keep bulbs and fixtures clean, focus light on your task and use fluorescent lights if possible.

Improper lighting can cause eyestrain and headaches.

Hazards associated with lighting include:

- glare – a computer screen positioned in front of a bright window can be difficult to see
- flickering lights – a fluorescent light may malfunction, causing annoyance, irritation and nausea
- inadequate or dim light – reading in dim light causes eyestrain
- reflections – sunlight reflecting on a screen can make it difficult to read
- shadows – shadows shifting across your work area can cause you to sit with bad posture in order to read your work.

Noise

Noise can include any annoying or disturbing sound. Excessive noise around heavy machinery or equipment can cause permanent hearing loss. Noise is a problem if it disturbs people, distracts them, interferes with communication, causes people stress or generally interferes with their work.

Many offices are open-plan in design, often with employees seated close to each other and divided by partitions at chest or head height. Think about noise levels when you set up your workstation. It should be possible for people in open-plan offices to have some privacy when they are on the telephone and carrying out their day-to-day activities.

Noise in the office can come from:

- machines (photocopiers, fax machines, printers)
- other equipment (telephones, paging systems, music)
- background noise (lifts, air-conditioning, traffic)
- people talking.

Noise management

Noise can also be a problem outside office environments, such as on factory floors, at construction sites or near airports. You may have to wear ear protection if you are required to work in excessively noisy areas.

There are many ways that problem noise can be controlled in the workplace. Noisy machines can be put in a separate room or area. Sound-absorbent materials such as carpet and partitions can be installed or arranged to deflect and absorb noise. The volume level on your telephone's speaker can be adjusted.

Remember that noise is only a hazard when it is stopping you from working productively, comfortably and safely. Many people prefer to work with low levels of noise rather than complete silence.

Air

Air-conditioned offices do not have fresh air from open windows. This can cause problems for some people.

Office workers frequently complain of being too hot or too cold. If a person's desk is near an air-conditioning outlet, the area around their desk can be much colder than elsewhere in the office. They can also suffer from dry and itchy eyes. Report such hazards to the relevant person. This situation can usually be corrected by adjusting air-conditioning flow.

Organise your work

Having a well-planned workstation and comfortable surroundings is pointless if you don't organise your work in a way that prevents discomfort or pain. Make sure you plan your daily tasks so that you aren't doing repetitive work for long periods of time. Make sure you take rest breaks and exercise regularly.

Positive work organisation includes:

- a mixture of repetitive and other activities
- rest periods
- exercise breaks.

Vary your activities

Your work role may involve several different tasks. Some tasks may be repetitive, such as typing up reports or entering data. If you are able to vary the tasks you carry out each day, this will help prevent repetitive actions that cause stress to your body. For example, if you have to enter a lot of data, break up the repetitive nature of the task by discussing a project with a fellow worker, collecting some research from the internet or doing another constructive workplace task you are responsible for. Workflow should be designed to reduce the repetitive tasks given to particular people.

Take rest periods

All employers need to provide rest periods for employees. Rest periods include tea breaks and lunch breaks. During the working day everyone needs to sit down, breathe easily, relax and take time to think about something other than work.

Have exercise breaks

When working with a computer, you should have short breaks at regular intervals to combat stress and prevent pain and discomfort. As discussed previously, using computers for too long without breaks has been associated with back and neck pain, headaches, migraines and eyestrain.

Try the following exercises several times a day, and encourage others around you to try them. Make sure you are relaxed and stretch gently, without overstretching. Stop if you feel any pain or discomfort, and remember to exercise both sides of your body. Most importantly, breathe deeply and evenly throughout the stretch.

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Neck	Turn your head gently to look over your right shoulder. Hold for 10 seconds. Now roll your head forward to look over your left shoulder and hold for 10 seconds. Repeat several times.
Shoulders	Sitting with a straight back and neck, roll your shoulders forward, then back. Repeat several times.
Wrists, hands and arms	Interlacing fingers, turn palms upwards. Now lift arms over your head and stretch, leaning gently to the left and then to the right. Repeat movement several times.
Upper and lower back	In a standing position place hands in the small of the back. Gently arch back and hold for 10 seconds. Repeat when needed.
Shoulders and arms	Stretch your arms above your head, cradle your elbow with your hand and gently pull your elbow behind your head. Repeat on the other side, holding the stretch for 10 seconds.
Eyes	Every 20 minutes, look away from the screen. Focus on a distant object (more than three metres away).

Work without stress

Here are some tips for working without stress.

Tips to help minimise stress
• Adjust your chair and desk to suit your body.
• Position your screen to suit your posture.
• Adjust other equipment for safe and comfortable use.
• Reduce excess noise.
• Ensure you have adequate light.
• Arrange your desktop so you can access things easily.
• Take regular breaks from your work.
• Frequently rest your eyes.
• Do stretching exercises.
• Vary your tasks.

Practise conservation techniques

Conserving resources at work benefits not only the organisation by reducing costs, but also the planet by reducing greenhouse gases and the amount of waste sent to landfill. Most organisations have policies and procedures for conserving resources. You can find out what these are by reading your workplace manual or asking your manager or colleagues.

Ways to conserve resources at work include:

- minimising paper wastage
- reducing energy use.

Minimise paper wastage

Wasting paper costs organisations and the planet a great deal. Consequently, many organisations have developed policies for paper usage. These include:

- using both sides of the paper when photocopying
- recycling non-confidential waste paper in recycling bins
- storing email messages in an electronic folder instead of printing
- reducing the volume of printing where possible
- reusing paper by using blank sides for rough drafts and reusing folders and files
- using recycled paper or paper from plantation timber for printed documents
- using a recycling service to collect waste paper.

Example: office paper

Using the following statistics, consider how many trees are used for office paper.

How many trees are used to produce paper?

- One ton of uncoated virgin (non-recycled) printing and office paper uses 24 trees.
- One ton of 100 per cent virgin (non-recycled) newsprint uses 12 trees.
- One ream (500 sheets) of paper uses six per cent of a tree.
- One tree makes 16.67 reams of copy paper, or 8,335 sheets.
- One carton (10 reams) of 100 per cent virgin copier paper uses 60 per cent of a tree.
- One ton of coated, non-recycled higher-end magazine paper (used for high quality photographic magazines) uses more than 15 trees.
- One ton of coated, non-recycled lower-end magazine paper (used for news magazines and most catalogues) uses nearly eight trees.

The statistics in this example are based on US short tons (2,000 pounds), not metric tonnes.

Source: www.conservatree.com

Minimise energy use

Wasting energy also costs organisations and the planet a great deal. Many organisations have developed policies and procedures to save energy. These include:

- providing training programs on smart energy practices so that employees can practise energy efficiency
- turning off equipment when not in use
- using power-save functions for equipment
- refilling toner and ink cartridges from printers.

Resource conservation

Here are some tips for practising conservation.

Resource conservation tips
• Use the power-save function on printers when they are not in use.
• Print and copy on both sides of the page, where possible.
• Use recycled paper (paper used on one side) in the photocopier and printer for rough drafts.
• Use recycled paper for telephone messages.
• Place a recycling bin near the photocopier.

Practice task 1

Here is a checklist to follow when setting up your workstation. Go through the points that are relevant to you and make any necessary adjustments to your work or study space. You may need another person to help you and check your posture. If you are not able to tick some of the checkpoints, change your study space or discuss making alterations to your workstation with your manager.

Chair

❑ Is the seat height-adjustable?

❑ Is it high enough to allow you to sit comfortably over 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 underneath it?

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?

Screen

❑ Does the screen have easily adjustable brightness and contrast controls?

❑ Is the image on the screen stable and flicker-free?

❑ Are there adjustment mechanisms to allow the screen 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?

1B | Identify and clarify the purpose, audience and presentation requirements of a document

Every organisation has an image it wishes to present to the public. A document can provide an opportunity for an organisation to promote itself. Therefore it is essential that the choice of document, as well as its presentation and content, represents the organisation in the best possible way.

When designing and producing text documents it is important to ensure they reflect your organisation's corporate image and style. You will need to develop the ability to clarify the task requirements so you can produce the most appropriate document. Knowing where to locate information about document design and structure and how to apply the information is a fundamental skill you will need every day in your job.

Communication with work colleagues is essential. When tasks are shared and if you are contributing to a common outcome, the way you communicate with your colleagues and interpret their instructions is critical. When given information to create a document, there may be several points you have to determine before proceeding.

Points to determine before proceeding when creating a document:

- Is this information for internal or external distribution?
- Is a letter, memo or fax the best way to distribute this information?
- What is the most efficient way of distributing this information?
- What document format would present the required message to the best advantage?

Identify a document's purpose

You will be asked to create several different business documents when you work in an office. The style and type of document will be dictated by its purpose. The purpose could be to convey:

- new products
- public holiday arrangements
- sales or special events
- notices to other organisations
- new policies
- financial information
- your organisation's annual activity
- new legislation.

Identify a document's audience

A document's purpose and presentation is influenced by its target audience. The formality and style of the document will be dictated by your intended reader. An internal document may be less formal than an external document. For example, an internal document may be an invitation to a staff end-of-year party and would not be as formal as a dinner invitation for the board of directors.

Discussion about the document's purpose, appearance, target audience, other users and organisational standards is important as it offers the document designer a vision of what is required.

Audiences may be:

- clients
- customers
- suppliers
- colleagues
- staff
- business associates
- industry organisations.

Identify the presentation requirements for a document

Once the document's purpose has been established, and the audience defined, you will then need to decide what type of document is required and how it should be presented.

Some typical text documents are listed below.

Typical text documents
• Simple or multi-page letters
• Memos
• Faxes
• Promotional material including brochures, calendars, flyers and forms
• Mail merge documents such as labels, reports, schedules and tables

Letters

Letters are a communication tool used to pass on a wide range of business information. They provide evidence or a record of a business activity. They are also a personal point of contact between an organisation and its clients. A well-written letter will give a professional impression.

Some common types of letters are provided below.

Acknowledgments

For example, to confirm that your organisation has received something, or to acknowledge a job application.

Complaints and claims

For example, to let a branch of your organisation know of a customer complaint, or to inform a supplier they have delivered faulty goods.

Adjustments

For example, a reply to a customer who has complained to let them know their problem has been resolved.

Covering letters

For example, to accompany what is being sent in a parcel of goods, or as an attachment to a document.

Follow-up letters

For example, to confirm something that has been agreed to verbally, or to confirm a date or time for a meeting.

Inquiries

For example, for information about who will be at a meeting, or to find out the availability of a conference centre.

Requests

For example, for quotations for a service, or to ascertain prices.

The structure of business letters

Most organisations use what is called a fully blocked layout. This has the entire letter (including the address) aligned on the left side and has single spacing between lines and a double space between paragraphs. Sometimes the punctuation is open, which means there is no punctuation outside the wording (body) of the letter itself. Some organisations use a mixed punctuation style, which means they place a comma after the greeting and the close.

Business letters will typically display the following elements.

Date

The convention in Australia is to write the day, month and year; for example, 12 May 2015.

Sender's address

This is not necessary if your organisation has letterhead paper.

Name, title and address of the recipient

If you do not know the person's title, you should try to find out. If you are unsure how a woman prefers to be addressed, use Ms.

Greeting

Sometimes called the salutation. This is usually 'Dear' followed by the same title and surname as used in the inside address. If you do not know the recipient's name, you can use 'Dear Sir/Madam'.

Body

This is the main content of the letter.

Closing

In a business letter the formal closing is 'Yours sincerely' if you know the name of the person you are writing to, or 'Yours faithfully' if you do not.

Signature and identification

This is usually six lines below the close. After the signature is the sender's name and position in the organisation (the position is usually in bold).

Example: business letter

J C J A C K S O N P H O T O G R A P H Y

"Capturing moments for eternity"

Shop 21, Fairholme Plaza
MAROOCHYDORE QLD R558
Ph: 07 5443 4237
Fax: 075443 4238
Email: inquiries@jcjackson.net.au
Web: www.jcjackson.net.au

Organisation's letterhead

Date — 20 May 2016

Mr Donald Turner

Recipient's name and address — Queensland Business Awards

21 Stephens Street

Cherrnside QLD 4032

Greeting — Dear Mr Turner,

Thank you for the opportunity to submit the quotation for the provision of photographic services for the Queensland Business Awards.

The quotation includes a breakdown of prices for services as discussed at our meeting last week. Separate charges are included for the following:

Body (content) —
- Hourly charge for photographer
- Proofs
- Individual reprints
- Bulk reprints
- Enlargements

If you require any additional information please do not hesitate to contact me. I look forward to speaking with you soon.

Closing — Your sincerely,

Signature — Joshua Jackson

Joshua Jackson

Manager

Memos

A memo is an internal document that is sent to staff within an organisation. Memos can be sent to either one person or several people. Memos should have the same headings as the next example: Memo, Date, To, From and Subject.

Example: memo

Memo header ———————

JCJACKSONPHOTOGRAPHY
"Capturing moments for eternity"

Memo

Date ———————— Date: 12 May 2016

Recipients ———————— To: All staff

Sender's name ———————— From: Joshua Jackson

What the memo is about ———————— Subject: Film supplies

Due to the recent problems we have experienced with the use of Professional Image X100 high-speed film we have negotiated with our supplier to return all remaining stock and receive a refund. Please return any Professional Image film you have to Susie as soon as possible.

Body (content) ————————

From now on all photographers must use Photo Gems XSpeed film. We have received our first shipment of this film and you can collect rolls from Susie.

Should you experience any difficulties with this film please report to me immediately.

Regards,

Signature ———————— Joshua Jackson

Faxes

A facsimile, or fax, is an electronically transmitted copy of a document. Sending a fax is a way to immediately send a hard-copy document from one location to another.

The first page of a fax is usually a cover sheet that has details of the sender, recipient, recipient's fax number, subject, date and number of pages. This cover sheet is then followed by any additional pages.

Example: fax

Organisation's letterhead

JCJACKSON PHOTOGRAPHY
"Capturing moments for eternity"

Shop 21, Fairholme Plaza
MAROOCHYDORE QLD R558
Ph: 07 5443 4237
Fax: 075443 4238
Email: inquiries@jcjackson.net.au
Web: www.jcjackson.net.au

Recipient's company name → **To:** Weber Auto Repairs
Recipient's name → **Attention:** James Patrick
Recipient's fax number → **Fax number:** 01 3847 2900
Sender's name → **From:** Joshua Jackson
Date → **Date:** 18 October 2016
Subject → **Re:** Staff photographs
Number of pages being sent → **No. of pages: 1** (including this one)

Greeting → Hi James,

Body (content) →

I really enjoyed doing the shoot with your staff and am glad to hear you are happy with the proofs. We have just started a new promotion and I wanted to let you know about it before you place your order.

November/December 2016 Special

During the months of November and December, corporate customers placing orders valued at $1000 or more will receive 50 calendars featuring the workplace image of their choice for no extra charge. These calendars make the perfect gift for your valued customers. Hurry! Offer ends 31 December.

Things are certainly getting hectic here and I would suggest you place your order by the end of November to guarantee delivery before Christmas.

Please give me a call if I can be of any further assistance.

Closing → Regards,
Signature → Joshua Jackson

Joshua Jackson
Sender's identification → Manager

Footer → Please check that you have received all pages.
If not, please phone 07 5443 4237.

Promotional materials

Promotional materials are used to promote an organisation and its products and services. These include flyers, brochures, invitations, business cards and price lists.

Information that may be printed on promotional materials includes:

- an organisation's name
- logo
- telephone and fax number
- street or postal address
- email address
- web address.

Flyers

A flyer is a piece of paper distributed to a wide audience to advertise an event, product or service. An organisation may produce a flyer to post to clients to inform them of a special offer, or to let staff know about an upcoming event. The purpose of a flyer is to attract people's attention and interest them in the flyer's subject.

Example: flyer

Brochures

A brochure is a piece of promotional material distributed by an organisation to provide information about its products and services. Brochures also offer other in-depth information about a specific product or range of products. Brochures can be either single or multiple pages and are often printed in colour with a glossy finish.

Example: tri-fold brochure

... continued

Example: tri-fold brochure

Who are our photographers?

Joshua Jackson and his team of leading photographers have all studied photography at leading educational institutions. Our team has a combined 35 years of experience in capturing memories. Portfolios are available for viewing to help you get a feel for their work.

Photographic Services

Studio Portraits

Studio portraits make the perfect gift for family and friends. We offer sittings for individuals, couples, friends and families. Portrait sittings are conducted at our Maroochydore studio. The services of hair and makeup artists are available on request.

Event Photography

Are you hosting a major corporate event. We are able to create a photography services package to meet the needs of your event. Options include social photographs, guest portraits, award/stage photos.

Wedding Photography

Create a beautiful record of your special day. We are there for every step and will even help you select the perfect location for your photos. Capture every moment including the bridal party preparing for the big day, the service and reception.

Special Occasions

We are happy to capture any special occasion including, birthdays, christenings, engagements and sporting events.

Corporate Photography

We are able to meet all your business needs. We specialise in team photos, portraits and workplace images. Our images have been gracing brochures, calendars, business cards, websites and offices for years.

Landscape Photography

Our award winning team are able to capture landscape images including sunsets, sunrises, ocean and rural scenes. We also supply images for use on planners and calendars.

Did you notice that the first page looks like it is backwards? When you create tri-fold brochures you need to create it this way so that when it is printed double-sided the content is displayed correctly. If you open a brochure template in Word, you will see this is how it is laid out.

Forms and tables

Forms are used by organisations to record and collect information. Forms can be single or multiple pages and can be created to meet any need. Common forms include customer feedback forms, order forms and time sheets. Your word-processing software has a range of features you can use to create forms, but one of the more popular methods is to use either one or a series of tables.

Example: customer order form

Review the Plants By Post order form. Four tables were used to create this form. Try to work out where they all are.

Form creation tips

Have you ever tried to fill in a form where the lines were too close together and the spaces provided were insufficient for the required responses? This is something you must be aware of when creating tables to fulfil that function.

Tables allow information to be displayed or collected in a clearly defined space. When using tables to display data, the use of headings for the rows or columns makes it easy for the reader to understand the data.

The table below demonstrates how effective tables are for presenting and clarifying data.

Number of new vehicle registrations		
Year	Victoria	New South Wales
2009	42,567	31,789
2010	44,214	32,854
2011	41,289	38,956

Imagine if the information were presented in sentence form. This is exactly the same information:

Victoria had 42,567 new vehicle registrations in 2009, 44,214 in 2010 and 41,289 in 2011 while New South Wales had 31,789 in 2009, 32,854 in 2010 and 38,956 in 2011.

Reports

A report is a document that outlines information about an activity in an organisation. A report may be written about the progress of an existing project, to detail 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 a lot of details that need to be collected from multiple people within or outside an organisation. For example, multiple teams may be working on one project and their progress needs to be recorded in one report.

Formal reports

A variety of formal reports are produced by large organisations. These include annual reports, financial reports, feasibility reports and project reports. These formal reports can be hundreds of pages in length and often use complex numbering systems so that people reading the report can easily locate information.

The structure of formal reports usually includes the following elements:

- Title page
- Lists of tables or graphs if necessary
- Introduction
- Conclusion
- References and acknowledgements

- Table of contents
- Summary of key points (executive summary)
- Main text (containing data, findings etc.)
- List of recommendations
- Appendices

Short reports

Short reports are less formal in structure and usually one to three pages in length. The structure will be customised to suit the data being presented and the audience. Examples of short reports include the results of a review of customer service standards, recommendations for a change of stationery supplier or purchase of an item, or a progress report on arrangements for a function you are organising. The structure of a short report is usually as follows:

- Introduction
- Main text (containing data, options, findings)
- Recommendations and conclusion

Due to the short length of these reports there is usually no cover page or table of contents; instead, headings provide structure.

Example: report

The following is an example of a one-page report recommending the purchase of a new printer.

Techno Train
Making sense of technology

Laser Printer Purchase

Laser Printer Purchase

Current situation

The bubble jet printer in the accounting department has been out of order three times in the last five weeks. It is constantly experiencing paper jams. Each time, the printer has had to be sent away for repairs and team members have had to make alternative arrangements in order to print their reports and documents. To minimise interruptions to others, most staff have been printing to the copy centre in the reception area, which means that they need to walk quite some distance to collect documents.

The current printer was purchased in February 2011 and has had constant use during the last five years. There is no warranty remaining on the machine. A new printer needs to be sourced.

Options

Quotes were provided by two suppliers, Office World and Technology Express. Each quoted on three printers from the low-volume laser printer range. The table below shows the details of each printer.

	Electro PNC1244 Laser Printer	Lockwood ENZ200 Laser Printer	Brownly HD2108 Laser Printer
Supplier	Office World	Technology Express	Office World
Price	$299	$386	$345
Warranty	12 months	12 months	24 months
Toner refill price	$55	$52	$60
Colour	Yes	No	No
Print speed	14ppm	21ppm	18ppm
Resolution	600dpi	2400dpi	1800dpi
Paper tray capacity	250 sheets	175 sheets	250 sheets
Dimensions	370W x 251D x 215H mm	371W x 361D x 165H mm	370W x 300D x 245H mm
Weight	5300 g	6500 g	6300 g

Only one printer offers colour, but this is not a high priority as the department mainly prints spreadsheets that do not use colour. Prices for consumables are similar for all models as is the size of the machines. Two machines have a 250-sheet paper tray capacity, which is an advantage.

Recommendation

Due to the mounting cost of repairs and current cheap prices of these printers, I recommend the purchase of the Brownly HD2108 Laser Printer, which has several advantages including a 24-month warranty, its mid-range price, large paper-tray capacity and fast print speed. Office World had the most competitive price and this model is currently in stock.

Attachments

- Quotes
- Brochures on each model

Report prepared by: Sasha Turner
Date: 6 July 2016

Signature: _____

Page 1 of 1

Schedules

A schedule is a list or plan that shows the order in which a number of events will take place. Schedules can also be used to list tasks that need to be completed. Commonly used schedules include itineraries, appointment diaries and timetables.

Example: itinerary

The following example is an itinerary for internal staff distribution.

JC Jackson Photography

Phone: 07 5443 4237   Fax: 07 5443 4238

Itinerary for Joshua Jackson
Whitsunday trip: 8–11 September

Friday 8 September	
Travel	• 10.00 am depart Maroochydoore, Qantas flight QF106 • 1.15 pm, arrive Mackay • Use taxis for local travel Ph: 131000
Appointments:	• 2.00 pm Mackay Beef • Ph: 4958 1122 • Lot 12, Retreat Road, Mackay • Re: Corporate photography
Accommodation:	• Mackay Motor Inn (Booking Ref: JAC809) • Ph: 4958 2349 • 284 Aerodrome Road, Mackay • Double room, non-smoking
Saturday 9 September	
Travel	• 5.30 am depart Mackay, Qantas flight QF63 • 7.00 am, arrive Hamilton Island • Shuttle bus to accommodation • Golf buggy for island travel
Appointments:	• 9.00 am Katrina Horne/James Huxton Wedding • Ph: 0462 340 987 or 0462 985 678 • Meet bride at Island Beauty Salon • Ceremony 1.00 pm Island Chapel • Beach shoot to conclude by 3.00 pm
	• 4.00 pm Fiona Carr/Shane Freeman Wedding • Ph: 0479 238 765 or 0479 456 778 • Meet at Island Chapel, ceremony 4.30 pm • Beach/golf course shoot followed by reception
Accommodation:	• Island Towers (Booking Ref: CORJAC21) • Standard room, early check-in arranged
Sunday 10 September	
Travel	• 11.00 am depart Hamilton Island harbour, Blue Ferries • 12.30 pm arrive Daydream Island
Appointments:	• 2.00 pm Kate Sharp/Dennis Souie Wedding • Ph: 0489 005 667 or 0487 198 772 • Meet at Daydream Gardens, ceremony 2.45 pm • Beach/golf course shoot to conclude by 5.00 pm
Travel	• 5.30 pm depart Daydream harbour, Blue Ferries • 7.00 pm arrive Hamilton Island
Accommodation:	• Island Towers
Monday 11 September	
Travel	• 7.00 am depart Hamilton Island, Qantas flight QF72 • 11.15 am arrive Maroochydoore • Picked up by Susie at airport

Calendars

Calendars are used to give an overview of events, appointments or meetings over a period of time. Calendars can also be used by organisations for booking resources, such as a meeting room, or for recording information, such as when staff will be on annual leave.

Example: calendar

Following is an example of a calendar showing workshop dates. This calendar is to be distributed to the company's external clients; therefore, the company logo, phone number, email address and web address must be displayed.

Techno Train
Making sense of technology

Training Calendar June 2016

Sun	Mon	Tue	Wed	Thur	Fri	Sat
			1	2	3 Intro Internet/ Email Workshop 9am–12pm	4
5	6 Training Centre Open Day 9am–12pm	7	8 Microsoft Word Workshop 9am–4pm	9	10	11
12	13	14	15	16	17 Adv Internet/ Email Workshop 9am–12pm	18
19	20	21	22	23 Web Page Design Workshop (Day1) 9am–4pm	24 Web Page Design Workshop (Day2) 9am–4pm	25
26	27	28	29	30		

For more information contact Techno Train

Phone: 07 3867 1333 **Email:** info@technotrain.com.au **Web:** technotrain.com.au

Mail merge

One of the most useful word-processing skills you can learn is how to create and perform a mail merge.

A mail merge is performed by combining the contents of two documents or files – one that contains the information you are sending and one that contains the details of the recipients (data source). The two files can be in the same program or in different ones. For example, the data source may be in Microsoft Excel and the mail merge may be done using Word.

Mail merges can be used to customise documents including letters, labels, envelopes, faxes, flyers and statements. They are especially useful when sending a mail-out to many recipients.

Below is a sample of some labels generated using the mail merge wizard in Word.

Alex Barney & Co 21 Ergett Street IPSWICH QLD 4305	**We Care Pharmacy** PO Box 38 CHERMSIDE QLD 4032
Ableton Accountants PO Box 23 CHERMSIDE QLD 4032	**Daleys Fresh Fruit** 98 Berwick Street DECEPTION BAY QLD 4508

Clarify a document's requirements

Every organisation has different requirements with varying levels of formal documentation. As part of an induction to a workplace you may be shown where to access the style guide or policies and procedures manual. If you weren't shown or you have forgotten, ask your supervisor where these documents are and how to access document templates on the computer.

If your organisation does not have a formal style guide, you could locate examples of documents that have previously been created and follow them. For example, locate last year's annual report. Identify whether the layout is still appropriate, and then use it as a guide. Show your supervisor the document you are planning to follow so you know you have the right type of document and style. You may wish to ask your supervisor if they would like you to create a style guide and templates for everyone to use.

Practice task 2

1. Explain the purpose, audience and presentation of the required document in the following situations.

   • The advertising department requires a new price list.

   • The payroll department wishes to have new PAYG information distributed.

   • The purchasing department wishes to advise that a product is no longer available.

   • The WHS committee is having a meeting and asks for agenda items.

   • The company is moving to new premises.

   Enter the information into this table.

Purpose	Audience	Presentation

... continued

Practice task 2

2. Why would it be inappropriate for a person's travel schedule to be circulated outside of an organisation?

... continued

1C Identify requirements to ensure consistency of style and image

Producing text documents that meet an organisation's requirements takes more than just great computer skills. Every time you produce a document you should apply your knowledge of organisational policies and requirements to ensure your work conforms to the established style and company image.
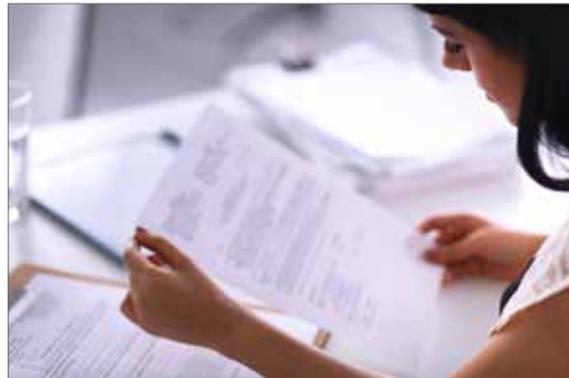
Why organisational requirements are important

Production guidelines are implemented for several reasons. One of the most important is to ensure that documents have a consistent style and image. By following organisational guidelines, all staff will create documents that have a similar style and format. This means that customers, business associates and anyone receiving material from your organisation will instantly recognise it as belonging to your organisation.

In many cases written communication forms most of an organisation's contact with its clients. Each time a client has contact with an organisation, they form an opinion based on the documents they receive. In some instances an unprofessional looking document, or one containing errors, can be the difference between gaining and losing a client.

Conforming to organisational requirements will also ensure you are able to complete your work in an efficient and timely manner. It is very frustrating to have spent hours working on the design of a document, only to find it does not meet requirements. To avoid a situation like this, there may be a simple template you could use.

Common organisational requirements

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

Most organisations outline document production procedures and guidelines either in their policies and procedures manual or in a specific in-house style guide. Make sure you know where these instructions are kept and that you are familiar with them.

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

To prepare appropriate documents for your organisation you must follow established guidelines and procedures for production.

Established guidelines and production procedures may include:

- Adhere to content restrictions.
- Use templates.
- Include the organisation's name, time, date, document title, file name etc. In the header and footer.
- Observe copyright legislation.

Present a consistent corporate image

The easiest way to understand the concept of a corporate image is to think of it as a uniform for your text documents. Many documents can wear this uniform, including correspondence, forms, emails, faxes, memos, websites, invoices, statements and reports. Just like staff in a company, this uniform may vary; for example, managers often wear a different company shirt or uniform to the other employees. Documents can also incorporate different parts of the company's image into their design.

A corporate image has several components, including:

- logo
- colour scheme
- house styles and templates.

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

Follow guidelines and procedures

Many organisations have policies and procedures for staff to follow, including style guides and templates for producing documents. The structure and content of these style guides and templates are determined by the organisation. In larger organisations and government departments they are usually clearly defined, while smaller organisations often have no formal documented style guide and staff are expected to follow examples of documents previously produced.

Style guides

Style guides vary between organisations: some may be available in hard copy and others on the intranet. Make sure you know where to find a copy of your organisation's style guide. Style guides often provide information on the desired writing style and might also specify the preferred formatting of text and pages.

Below are some styles relevant to writing and text and page formatting.

Writing style

Writing style information:
- The use of abbreviations
- Preferred spelling of words; for example, Australian not American English
- Use of hyphens
- Use of capitals
- Use of full stops

Text and page formatting

Text and page formatting information:
- Fonts, font sizes and colours
- Margins
- Indenting
- Bullets and numbering
- Headers and footers
- Borders

Example: style guide information

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

Dates

Our date style is day month year; for example, 30 June 2014.

Legislation

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

Copyright Act 1968 (Cth)

the Privacy Act

Spelling and hyphenation

C

checklist

check-up

Commonwealth

coordinate

cost-efficient

Preferred layouts

The organisation's preferred layout and formatting of documents can also be applied by using templates for letters, faxes, memos, reports, invoices etc.

A style guide might describe the process for:

- naming and storage of files
- the use of disclaimers (disclaimers are notices placed on correspondence and documents by organisations to remove them from risk of legal liability where people either misinterpret or misuse information, or repeat information they should not have received).

Example: email disclaimer

Most organisations use disclaimers at the bottom of all emails they send. This may look similar to the following:

> This email is intended for the use of the addressee only and may contain confidential information. If you are not the intended recipient, you are hereby notified that any use or dissemination of this communication is strictly prohibited. The sender disclaims liability for any errors, omissions, viruses, loss and/or damages arising from using, opening or transmitting this email. If you received this transmission in error, please notify JC Jackson Photography immediately on (07) 5443 4237, then delete this email.

Templates

Templates are established style models used to create documents. Most organisations store electronic templates that are pre-formatted for use in producing documents. Templates define for the user the preferred layout and text formatting for documents, increasing efficiency in production and ensuring consistency in design. Printed copies of templates will often be included in the style guide.

Word includes a range of templates for documents, including letters and faxes, memos, reports and calendars. The advantages of templates are shown below.

Consistency

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

Saved formatting

Templates can be as simple or complex as required, and saved formatting can include margins, fonts, columns, headers and footers, logos, colours and styles.

Template integrity

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

Headers and footers

Many organisations use the headers and footers as an easily identifiable location to place important information. Depending on the document type, headers or footers may be used to display information such as:

- the name of the organisation
- the document title
- the filename and path
- the location, date and time the document was created.

The contents of headers and footers can be saved for use on templates.

Take a look at the headers and footers and page numbers in a phone book. Notice the way they are constructed to give the reader information.

Content restrictions

There are some details you are not permitted to give out in written documents. The kind of information subject to content restrictions depends on the organisation and may include results of investigations, financial data or employee data.

Content restrictions can also be applied to the way an organisation words its documents.

Organisations are often very careful about the way they phrase information to ensure it is not misinterpreted or acted upon without professional advice being sought. For example, a financial planning firm that recommends a particular share purchase in its monthly bulletin may include a line that says: 'Please consult your financial adviser before acting on any of the information received in this bulletin'.

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

Copyright legislation

Copyright ensures that individuals and organisations do not copy or reproduce content, including text or images, from another source without receiving permission or acknowledging the original author. The *Copyright Act 1968* (Cth) is the legislation governing copyright in Australia. The Act has been amended since 1968 to ensure it meets changing copyright needs.

To ensure you avoid breaching copyright laws, always record the details (for example, who wrote it, where you found it) of any images or passages of text you are borrowing from another source and reference them appropriately. Although information about appropriate referencing methods can generally be found in an organisation's style guide, check with your supervisor to ensure you are doing it correctly because breaching copyright can lead to your organisation being sued.

For more information on copyright, visit the Australian Copyright Council's website at: www.copyright.org.au.

Determine task requirements

It is important to accurately determine the tasks you need to perform when preparing a document. The more organised and efficient you are, the easier it will be to produce a well-designed document that conforms to your organisation's requirements and meets audience expectations.

There are many tasks you may be required to complete when producing letters, memos, faxes, promotional materials, forms, tables, reports, schedules, calendars and mail merge documents.

You need to identify whether you are required to follow an existing template or design the document yourself.

Using your knowledge of document design and corporate image, you may need to identify whether:

- you are required to include the company logo and, if so, where
- there is a standard font to use

- you are using the recommended language style; for example, not too much jargon and a suitable tone, such as friendly or formal
- there are budget constraints; for example, you might design a great two-page brochure, but the budget may only be for one page
- you are allowed to include any design features you wish
- the copyright symbol must be included.

Letters

You need to check whether attachments or enclosures are necessary, such as references, cheques or brochures. You type encl. and the number of enclosures under the sender's identification. If you are sending the letter to more than one person, you should write cc (originally meaning carbon copy) underneath and include the names of all the recipients.

Many organisations also require a reference line at the bottom of the letter that refers to the organisation's electronic file or paper records, or the person who has prepared the document.

For letters that use more than one page, check your organisation's style guide regarding the type of paper to use. Some organisations use letterhead paper only for the first page and print subsequent pages on corporate coloured (blank paper the same colour as the letterhead) or white paper. Other organisations use letterheads for all pages.

The page number and sometimes the number of pages are usually shown in the footer on each page. For example, 1/3 (meaning page one of three) may be shown on the first page of a three-page letter but more likely a 2/3 and 3/3 on the second and third pages with no numbering on the first page.

Memos and faxes

Organisations normally have a standard layout for memos, which is saved as a template. If your company does not have a template, use a standard memo layout from Word.

To find out the procedure for sending faxes in your organisation, refer to the style guide or policies and procedures manual. If your organisation does not have a template, follow the standard layout available in Word.

Promotional materials

Creating flyers and brochures requires you to use your design skills. Before you can produce the flyer or brochure, you need to know if it will be in colour or black and white, the paper size it will be printed on and what information must be included. Information that will usually be printed on a flyer or brochure includes

the company name, logo and telephone number, although other details may also need to be included. Check your organisation's style guide and templates and always ask another person to review your design and finished flyer or brochure. Below is some useful information for producing a range of promotional materials.

Forms and tables

Just like flyers and brochures, designing new forms will require you to use your design skills. You will need to know if they will be in colour or black and white, the paper size they will be printed on and what information must be included. The information to be included may depend on whether the form is for internal company use or external (client) use. Check your organisation's style guide and templates and always ask your supervisor to review your design and finished form.

Reports

You need to undertake a variety of tasks when preparing a report. You need to determine the complexity of the report, including its length, structure and the level of detail needed to suit the purpose and audience. See your organisation's style guide or templates for the preferred layout.

Schedules

As schedules may be distributed either within an organisation or to external clients, make sure you follow the guidelines in your organisation's style guide and templates and get your supervisor's approval for the final document and distribution.

Calendars

Calendars are usually generated for the month, but can be customised to any length.

The easiest way to create a calendar is by using the inbuilt wizards in your word-processing or desktop publishing software. The major advantage of using these wizards is that the dates are automatically generated. Like schedules, calendars can be distributed to internal or external clients.

To ensure you uphold the required corporate image, follow the guidelines in your organisation's style guide and templates and get your supervisor's approval for the final document.

Mail merge documents

You should treat mail merge labels like any other document, applying styles and formatting according to your organisation's guidelines.

Practice task 3

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

1. List at least three things that must be included in the document.

2. Write a list of at least five questions you would ask your supervisor in order to clarify the task requirements.

Summary

1. Ergonomics is about creating comfortable working conditions and setting up a workstation to suit your physical requirements, which can prevent undue stresses and strains. Performing exercises during the working day can stop the causes of pain and discomfort.

2. Use equipment to improve your posture and be aware of environmental factors in the workplace – such as lighting, noise and air quality – that affect people's health.

3. Plan daily tasks to prevent repetitive work being done for long periods of time. Take short breaks at regular intervals to combat stress and prevent pain and discomfort. Enjoy rest periods to relax and think about something other than work.

4. Conserving resources at work benefits the organisation by reducing costs and benefits the planet by reducing greenhouse gases and the amount of material sent to landfill.

5. Organisational requirements are important because they ensure all documents produced are consistent in style and layout and include:
    *   presenting a consistent corporate image
    *   following style guides and templates
    *   adhering to content restrictions
    *   observing copyright legislation.

6. Documents produced by an organisation include letters, faxes, memos, promotional materials, reports, forms, calendars, schedules and mail merge documents.

7. You should always clarify the task requirements before producing your document to ensure you create the right document type and use the appropriate style and design elements.

Learning checkpoint 1
Prepare to produce word-processed documents

This learning checkpoint allows you to review your skills and knowledge in preparing to produce word-processed documents.

Part A

1. 'The environmental factors of a building can contribute to the productivity of an organisation.' Write one A4 page describing how noise, light and air quality could affect productivity at work.

2. There are two ways of conserving resources in an office environment: minimising paper wastage and minimising energy use. Using a table similar to the following, list as many conservation techniques as you can think of; that is, not just the ideas mentioned in this topic.

Minimising paper wastage	Minimising energy use

Part B

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

Case study

Angelina works as an administration officer. Her main tasks are reception duties, word processing, handling the mail and filing. Most days Angelina's manager gives her urgent work in the afternoon that needs to be completed that day. Her time lines are always very tight and she often finds that she has to work during her lunch hour and for an extra half hour in the evening. She is always exhausted and is becoming stressed.

To make matters worse, Angelina finds that work is often just dropped on her desk, which makes her desk disorganised and difficult to use. She can't alter her chair and there is glare coming from her screen. She often leaves work with a headache and a backache.

1. List all the unsafe work practices Angelina experiences.

2. For each of the unsafe practices you have listed, describe a solution.

3. In half an A4 page, describe why work organisation and ergonomics lead to better employee health.

Part C

1. For each of the following tasks, list the type of document that needs to be produced (for example, fax, memo) and why it is the best choice. You do not have to produce the documents.

   - Confirming an appointment time

   - Distributing information to a large number of people regarding a product that is on special

   - Sending a personalised invitation to 50 valued customers to attend a product launch

   - Providing a hard copy of information requested in a phone conversation to a staff member in another organisation. The information is needed immediately

   - Advising staff in your organisation that a meeting is being held to discuss the new enterprise bargaining agreement that is being negotiated

   - Collecting information from customers regarding the quality of customer service the organisation is providing

   - Letting your supervisor know the results of your research into which catering company would do the best and most cost-effective job of providing lunches for monthly staff meetings. Your supervisor also requested a brief overview of each company's prices and a sample menu
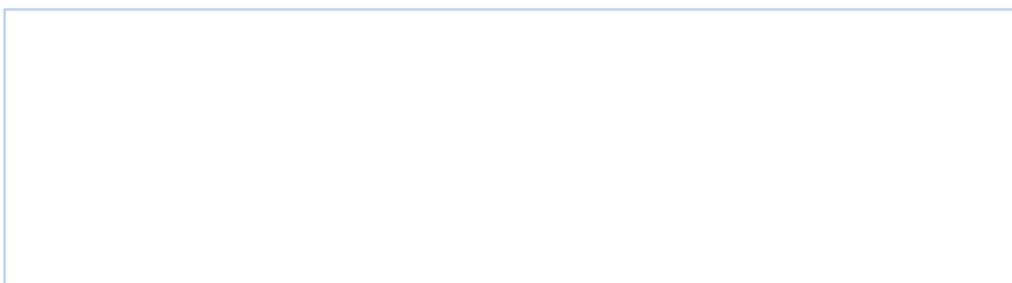
2. Based on what you have learnt in this topic, evaluate the consistency of an organisation's corporate image.

   a) Collect several documents from the same organisation (for example, letters, statements, invoices, brochures) and compare them. Banks and insurance companies are good organisations to use for this exercise.

   b) What features do all the documents have in common?

   c) List at least five things that contribute to presenting a consistent corporate image. Alternatively, if the organisation is not presenting a consistent corporate image, write half an A4 page of suggestions that could be implemented to enable it to do so.

3. Develop a checklist of 5–10 questions you can ask to help you clarify the task requirements for a document you have been asked to produce.

    - Word process the checklist.

    - Use one of the documents listed in this topic as an example.

    - Submit the completed checklist to your trainer. You do not need to submit the word-processed file.
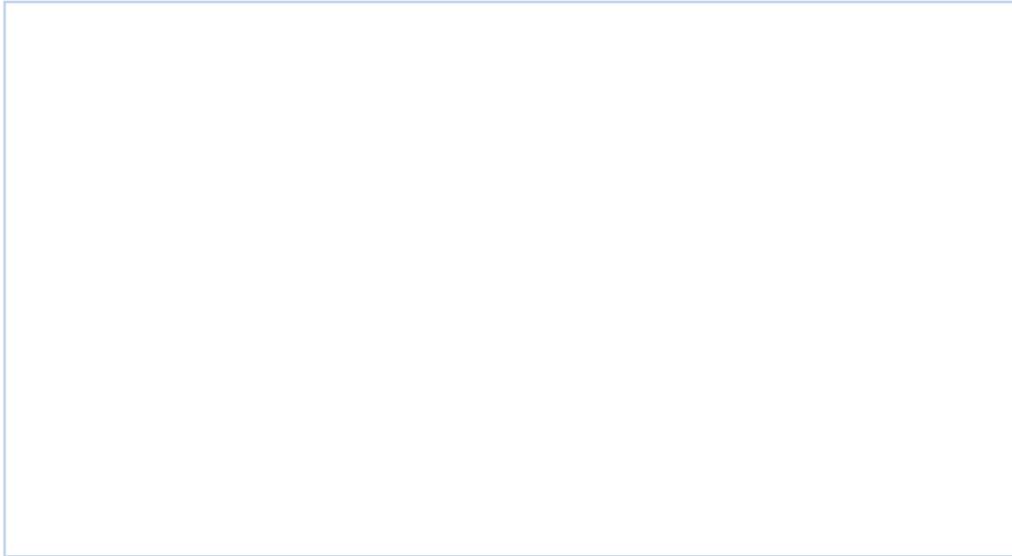
Topic 2
Design word-processed documents

One of your main duties when working in an office may be creating and editing word-processed documents. To ensure you perform your duties in an efficient manner, you must establish the purpose, audience and information requirements for documents before you start creating them. In this topic you will become familiar with the various information requirements and design elements that must be considered, along with the functions you can use to ensure consistency in your documents.

In this topic you will learn how to:

2A   Design the structure and layout of a document

2B   Design the document to enhance readability and appearance

2C   Ensure consistency of design and layout

2A | Design the structure and layout of a document

Various factors influence the structure and layout of a document. You should consider the purpose of the document and the information that must be included, as well as who is going to be reading and using the document. You should ensure you have clarified each of these points before starting the design of your document.

What is the document's purpose?

If you are asked to produce a word-processed document, the first thing you must clarify is the purpose of the document. Its purpose will determine the way it is planned and designed.

The type of document you select and the layout you apply are also determined by its purpose; for example, if you are writing to confirm a meeting time with a client you might choose a letter, but if you wish to advertise a sale you might choose a flyer.

A document's purpose will also influence how formal the document is. If you are producing an invitation to a black-tie function, it will need to be formal and stylish to suit the occasion. In contrast, a flyer advertising an end-of-year staff party could use a more informal design.

Who is the audience?

When you are producing a word-processed document, you need to keep in mind who it is intended for when deciding how the information should be presented. The audience helps you determine the writing style to use; for example, formal, informal, detailed or brief notes. A full report rather than a summary of the key points would be needed for a group of executives.

The language style and amount of jargon used should be suitable for the audience. If you are developing a document for clients who are not familiar with the subject matter, you may need to avoid using jargon so they don't become confused, or include a glossary that explains the technical terms you have used.

A document's audience also influences its design, including the choice of fonts, graphics and layout of the information. For a formal report, you might use photographs, diagrams and tables that represent significant data, whereas for a newsletter you might choose some Clip Art graphics.

What information is required?

Most documents you create will have specific information that must be included in them. This may be information to maintain you organisation's corporate image; for example, the company logo or standard headers and footers. It could also be information that is critical to conveying the document's message; for example, a flyer about an upcoming workshop must include the date, time and venue of the workshop.

The design of the document will be determined by the information it contains. You need to consider the type of information and the clearest way to display it. Is the information communicated in graphics or text? Would you use bullets, tables or columns? Once this is clarified, you can identify how you will structure and lay out the document.

Structure and layout

After you have determined the purpose, information and audience requirements for the document, you can implement the design. Designing a document refers to the way you organise the content and layout. You should take several design aspects into consideration.

Design aspects to consider:

- Boxes
- Columns
- Headings
- Page layout
- White space

- Colour
- Graphics, photographs and drawings
- Letter and memo conventions
- Typeface

Boxes

Text boxes can be used to give clearly defined borders or edges to particular content on a page. Putting an item in a box can make it stand out. Using design elements – such as boxes –consistently on a range of documents can help the audience to quickly locate information they have a particular interest in. An example of this is displaying small advertisements in a newsletter. If you use the same positioning and boxed design in each edition, readers will learn to look for the information in that format.

Example: flyer design

Following are two designs for a flyer. You can see how the boxes in the example on the right grab the reader's attention.

Two flyer designs

Packers Carpets and Mats

Shop 1, 152 Goss Road, CALOUNDRA QLD 4551
Ph: 07 5467 4523 Fax: 07 5467 5422

Web: www.carpetandmats.com.au

June specials

ON SALE 1–30 JUNE

With the weather cooling down, now is the time to install carpet from our modern easy-care range. Modern carpets keep your family warm and cosy in winter and cool in summer.

Easywear carpet

For: High traffic areas

Colours: Grey, Bone, Olive

Price: $48/sq m

Stain Resist Carpet

For: Lounge and dining rooms

Colours: Buff, Stone, Green

Price $76/sq m

Lush Pile Carpet

For: Bedrooms

Colours: Marble, Grape, Citrus, Honeysuckle

Price $105/sq m

Indoor/Outdoor Carpet

For: Use in enclosed outdoor living areas

Colours: Green, Red, Brown, Black, Grey, Stone

Price $36/sq m

Hallway Runners

Back by popular demand

Large range of colours and styles

From $8 per metre

Hurry in! Available only while stocks last!

Packers Carpets and Mats

Shop 1, 152 Goss Road, CALOUNDRA QLD 4551
Ph: 07 5467 4523 Fax: 07 5467 5422

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With the weather cooling down, now is the time to install carpet from our modern easy-care range. Modern carpets keep your family warm and cosy in winter and cool in summer.

EASYWEAR CARPET
For high traffic areas
Colours: Grey, Bone, Olive
Price: $48/sq m

STAIN RESIST CARPET
For lounge and dining rooms
Colours: Buff, Stone, Green
Price: $76/sq m

LUSH PILE CARPET
For bedrooms
Colours: Marble, Grape, Citrus
Price $105/sq m

INDOOR/OUTDOOR CARPET
For use in enclosed outdoor living areas
Colours: Green, Red, Brown, Black
Price $36/sq m

HALLWAY RUNNERS
Large range of colours and styles
Starting price: $8 per metre

BATH MATS
New season colours and novelty range
Starting price: $12 each

Hurry in! Available only while stocks last!

Colour

The use of colour in documents can be valuable both for presenting a consistent corporate image and for making items stand out. When one section of a document is in colour and the remainder is in black and white, the reader's eye is automatically drawn to the coloured section.

You may also need to consider the colour of the paper you will be printing your document on, as some fonts and graphics may not be easy to read on coloured paper; for example, black print can sometimes be hard to read on dark red or blue paper.

Look at newspapers and magazines to find examples of the effective use of colour. Advertisers often pay extra for coloured advertisements to make them stand out.

Columns

Columns are a popular design element for forms and newsletters. In newsletters, columns can be used to create interest and to separate articles from each other. Altering the number of columns can give you more options when fitting in graphics and tables, allowing you to fully utilise the space.

Example: column design

Look at the version of the Capricorn State School newsletter shown on the right in the following example and you can see how the use of two columns in the top half of the page fits in the three small articles and makes them easy to read. The single column at the bottom of the page is used to fit in the biggest of the articles.

By contrast, for the same newsletter in one-column layout, as shown on the left, the top article appears to have too much white space or gaps and the information in the second two articles is mixed with the tables. This is not a well-designed document.

When designing forms, the use of rows and columns can allow for the effective collection of data in the available space. Columns on forms guide the user to record information in the correct place. When designing forms, tables are often used to create the required columns.

Graphics, photographs and drawings

Graphics, photographs and drawings can be powerful design tools. They can be used to break the monotony of continuous text or to clarify information.

The use of appropriate graphics can help the audience understand the document's contents. An effective use of graphics could be using an eye-catching picture to draw the audience's attention to a flyer, or using the company logo on documents to portray a consistent and professional image to corporate clients.

Example: graphic design

Graphics such as tables and graphs can also be used to represent data, as shown in the following example of a sales report. Using this technique is very effective when presenting data to a corporate audience.

JUNE QUARTER PRODUCT SALES REPORT

We are pleased to report that Electronics Warehouse has had an excellent June quarter. Total sales for the period 1 April to 30 June increased by 5% on the March quarter and showed an increase of 12% over the same period last year.

This trend has been driven by the recent reduction in prices of several of our major lines and is shown in the following column chart.

PRODUCT SALES

Headings

Headings are a valuable way to give a document structure. They help the reader to pick out the main topics and discussion points or quickly skim the document to get an idea of what they are about to read. Ensure that headings are relevant and concise, and use a consistent font and style throughout the document.

Headings are important when creating long reports and documents because of the amount of text and information the reader needs to absorb. Take, for example, the headings in this book, which tell you what you are about to learn and allow you to find the information quickly. Eye-catching and descriptive headings on flyers and promotional materials help attract the audience's attention.

Letter and memo conventions

When designing letters and memos it is important to use any available templates and follow the guidelines in your organisation's style guide. As explained in Topic 1, a template is an established style model for a document. Using templates helps ensure that all required information is included and that you maintain the organisation's consistent corporate image.

Make sure you are familiar with the letter and memo templates used in your organisation and follow the conventions set out in the style guide.

Page layout

Page layout refers to the way all the different elements on the page come together. It is the integration of all the great design ideas we have and making them work together. First, you must ascertain what size your document will be – it could be A4, A5, letter, B5 or a custom size – and how many pages the document will have. If the document is being mass-produced (for example, flyers and newsletters), the paper size and number of pages will usually be determined by the printing budget, so make sure you are clear on your organisation's requirements before creating the document.

You must make effective use of the space available. Setting appropriate margins for your document will ensure you have the optimum amount of space to work with. When deciding on the layout of a page, you need to assess the importance of each piece of information and make sure the reader's eye is drawn to what is most relevant. Your organisation's style guide will outline any elements of documents that must be included and you will often find these items have standard positions on the page so as to maintain the corporate image. It is good to position these first and then consider the layout of the remaining information.

Example: page layout

The following is an example of two versions of a customer satisfaction survey. Both documents include all the necessary information but only the one on the right has an effective page set-up. The result is a document that is easy to fill in, which means that customers are more likely to take the time to complete the survey.

Improvements we can see in the document on the right compared with the one on the left:

• A border has been added

• Use of a large, clear heading

• Plenty of space is allowed for written answers

• Question numbers added, which will make collation of data easier

• Effective use of the whole page (no gap left at bottom)

Typeface

Most word-processing software packages give us at least 50 choices of typeface – commonly referred to as fonts. Some of the better known ones are Times New Roman, Arial, Comic Sans MS and Courier. Some fonts can be hard to read and you need to consider this when designing your document. It can also be confusing for the reader if you use a lot of different fonts that don't go well together.

Your selection of font will also be influenced by the audience and purpose of the document you're producing. A report with a large amount of text needs to be presented using easy-to-read fonts, such as Times New Roman or Arial. Alternatively, a more casual font, such as Comic Sans MS, may be suitable for an informal invitation, as it appears warm and welcoming.

Example: typeface

In the two examples of reports shown below, you can see how the one on the left is far easier to read because it uses consistent fonts for the headings and body text. The Arial font that was selected is easy to read and suitable for a large document. The report on the right has too many different fonts, some of which are hard to read; the reader may not even be sure if all the sections are related.

Laser printer purchase

Current situation

The bubble jet printer in the accounting department has been out of order three times in the last five weeks. It is constantly experiencing paper jams. Each time, the printer has had to be sent away for repairs and team members have had to make alternative arrangements in order to print their reports and documents.

Options

Quotes were provided by two suppliers, Office World and Technology Express. Each quoted on three printers from the low-volume laser printer range. Quotes and details are attached.

Recommendation

Due to the mounting cost of repairs and current low pricing of these printers, I recommend the purchase of the Brownly HD2108 Laser Printer, which has several advantages, including a 24-month warranty.

Laser printer purchase

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White space

White space refers to the blank space or gaps around parts of the document. Leaving appropriate amounts of white space around these elements ensures the document does not become too crowded and confusing or that items don't look too isolated and out of place.

It is not essential to fill up every bit of space on the page, but you don't want to leave a big empty blank area either. Sometimes leaving some space around an item can draw attention to it.

Example: white space

Look at the two documents in the following example. The one on the left has an even amount of space at the top and bottom and on each side of the centred information. This use of white space draws attention to the details of the laptop and to the contact details for Huxley and Associates.

The document on the right uses the space poorly; all the information is squeezed into the top part of the document and a large gap is left at the bottom. The reader's eye is not drawn to the details of the laptop as this blends in with the rest of the text.

Practice task 4

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

Case study

Jennifer works as an office assistant for a training organisation. Her supervisor assigns her the task of creating a monthly newsletter. She presumes the newsletter is going to be distributed to the organisation's clients. She spends several days working on the newsletter, researching various hints and tips, creating a training calendar and preparing trainer profiles.

She presents her draft newsletter to her supervisor and learns that she was actually meant to create an informal staff newsletter for the organisation's employees. Most of the work she has done was unnecessary.

1. What might the consequences of Jennifer's actions be?

2. How will her workload be affected?

3. What can Jennifer do to avoid this problem in the future?

... continued

Practice task 4

4. Collect three documents (for example, letters, faxes, reports, flyers) and write a description of how white space is used in each. The documents can come from any source: it may be something you have received in the mail, that you or other employees have created, or that you have found on the internet. Ensure at least one of the documents is an example of poor use of white space. Include details of what you would do to fix the problem.
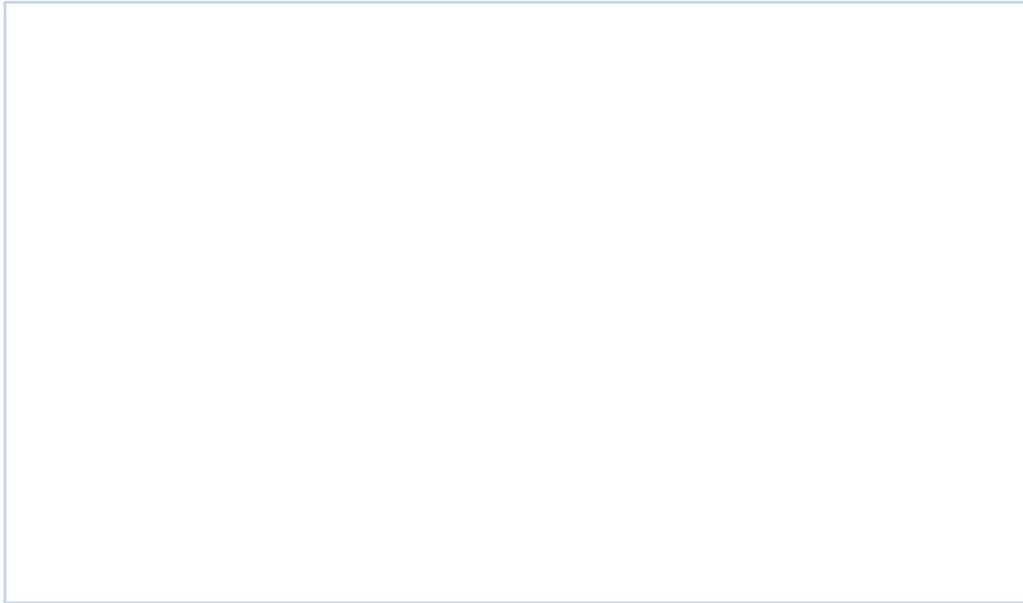
5. Consider an internal memo and a promotional brochure. How would the purpose of each document affect its design and layout?
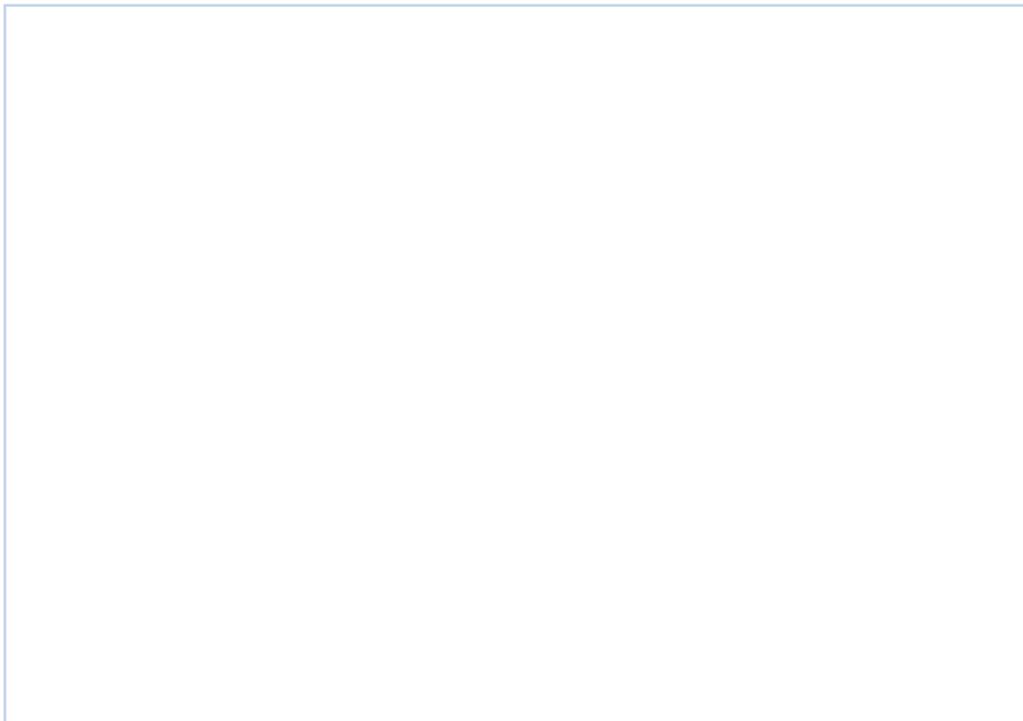
2B Design the document to enhance readability and appearance

Have you ever looked at a document and thought how fantastic it looks or how easy its message is to understand? Or have you ever been left confused by a document, wondering why more thought wasn't put into the design and exactly what message it is trying to relay? Documents are important communication tools that need to be suitable for the audience and purpose, as well as being visually appealing and easy to read.

When producing word-processed documents it is vital that you spend time working on a design that is readable, eye-catching and meets task and organisational requirements. Remember that everyone has a different opinion and what you think looks great may not appeal to someone else, so don't forget to ask for feedback.

Design elements

The following design elements are basic guidelines you should follow to ensure the readability of your finished document.

Consider the following as part of the design process:

- Balance
- Diversity
- Relative positioning of graphics and headings
- Simplicity
- Text flow
- Typography

Balance

Balance refers to the way text and graphics are distributed on the page. A document is unbalanced if all the content is at the top or bottom, or left or right of a page with very little on the opposite side. There should also be a balance between the amount of text and graphics on a page so that the page doesn't look overcrowded or dominated by one feature. Distributing the text and graphics throughout the document will also contribute to achieving balance.

The two versions of 'Laptops for Sale' earlier in this topic show a well-balanced and a poorly balanced document.

Diversity

Word-processing software packages offer many different ways to present and format your documents. Although you need to maintain your organisation's corporate image, it is still important to keep documents such as flyers, brochures and newsletters interesting. This can be achieved through careful use of the diverse range of formatting options available.

You can vary how you arrange documents such as a monthly newsletter or report. Where similar data is produced each month, you may choose to change the way it is displayed. One month you may use a table to display sales figures, and the next month you may use a chart. This allows you to maintain the overall look and feel but still keep it interesting.

Relative positioning of graphics and headings

When placing headings, body text and graphics on a page you need to ensure that they are positioned so the information is easy to understand. The position of headings and graphics can really help or hinder the reader in understanding a document.

As a general rule, in documents such as reports and newsletters, a graphic should not be directly under a heading as this area is reserved for the text that explains what the section is about – the introduction. Graphics should be placed close to the text they relate to.

Example: use of headings and layout

Following are two examples of how headings and graphics are used in a report. The report on the left has the graphic following directly after the heading. The problem with this is that the heading seems lost and no longer related to the text. The document also appears very unbalanced. The document on the right is a good example of positioning headings and graphics and you can see how much more balanced it appears.

You should note that this rule does not apply to documents such as flyers because of the limited amount of text they normally contain.
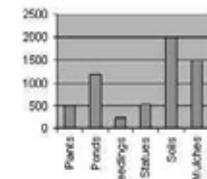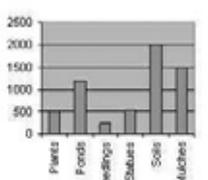
Simplicity

One way to make text more readable is to use a simple design that is not crowded, disjointed or too busy. The text should be large enough to read and should flow in a logical manner. Try not to change between single and multiple columns more than once on each page, use borders and boxes sparingly, and stick to one colour scheme. Remember you don't have to use every single feature offered by your software.

Have a look again at the laser printer purchase examples earlier in this topic to see how simple font choices can work best.
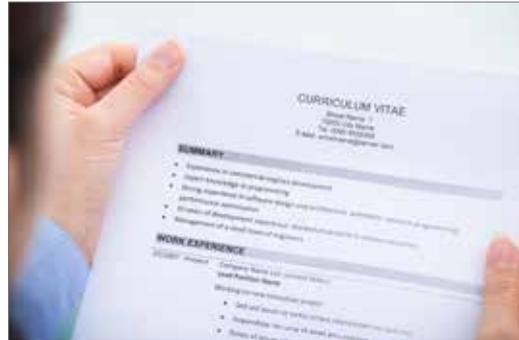
Text flow

Text flow refers to the way passages of text are positioned in a document. The way text flows in a document is one of the most critical elements influencing its readability; if text flow is arranged carelessly, the reader can become confused. Text can flow from one column to another or from one page to another. Newsletters, newspapers and magazines regularly have to split articles across columns or pages in order to fit text in, so it is vital to ensure the reader can locate the follow-on text.

When text from a particular article has to flow over more than one page, you may decide to include information that tells the reader where to find the rest of the article. You might add 'continued on page 2' at the bottom of the article, then on page 2 at the top of the article you would add 'from page 1'. You might use an arrow indicating to turn over the page to continue reading.

Typography

Typography refers to the use of various text formatting and font options in the production of documents. Using effective typography allows you to fine tune a document and add the finishing touches. Remember to ensure you are still able to complete your document on time, as some of these design elements can become time consuming. There is more to using text effectively than just choosing a font type, font size and text alignment – as shown here.

Font	The font you choose can have a huge impact on the amount of space a passage of text uses. Try typing the same line of text in several different fonts and you will see a difference. For example, look at the different lengths of the sentences below. • This is a line of text in Times New Roman. • This is a line of text in Arial. • This is a line of text in Courier New.
Kerning	Text kerning is a technique you can use to fine tune the way text looks. It involves adjusting the amount of space between two characters you have typed. Kerning is normally only used in very large headings and its main purpose is to avoid the appearance that some letters have more space between them than others. In the next example you can see that the top line, which has kerning applied, is slightly shorter than the bottom line. On close examination the major difference is the spacing between the letters in the word 'To'. • To kern or not to kern • To kern or not to kern
Character space	Another technique you can use to achieve additional emphasis on headings is to adjust the spacing between all selected characters, rather than just between two characters. In the next example the top line has an expanded spacing applied, the middle line has no spacing applied and the bottom line has condensed spacing applied. • Expanded Spacing • No Spacing • Condensed Spacing

Practice task 5

Your company is hosting its annual end-of-year staff party and you have been asked to design a flyer to be distributed to all staff advertising the function. Information to be included in the flyer is as follows:

Company name: Pack and Go Express Couriers

Date: 16 December 2016

Time: 5.00 pm

Venue: Rush Restaurant and Club

Address: 41 Villa Street, Fremantle

RSVP: 10 December 2014

Dress: Themed party: 80s revival – prize for best dressed

Cost: No charge

Program:

5.00 pm Pre-dinner drinks

6.30 pm Buffet dinner

8.00 pm Awards and novelties

9.00 pm Entertainment – live band

Pictures and logos – select suitable graphics from Clip Art

Create the document in Word. Ensure you apply what you have learnt in this topic about document design and layout when designing it. Save and print your finished document.

2C Ensure consistency of design and layout

You should now understand the range of design elements that need to be considered when developing a document. These elements form the basis of good design and you should work with them, while still adding your own professional touches to the layout. The most important factor in document design is ensuring the information is clear and able to be understood by the target audience. Always incorporate your organisation's specific design guidelines as well.

A range of software functions is available to ensure you produce documents that are consistent in design and layout. Using these functions will increase your efficiency and help you maintain elements of your organisation's corporate image. Using functions such as style sheets can take some of the hard work out of document formatting. Style sheets are a set of statements that specify presentation of a document. Style sheets may be written by content providers in style guides, created by users or built into software.

Automatic functions

You can use a variety of automatic functions when creating a document to ensure consistency. Many of these functions, such as AutoText and AutoCorrect, will increase your speed when creating documents.

Useful automatic functions:

- AutoText
- AutoCorrect
- Header & footer
- Table headings
- AutoFormat
- Styles
- Default settings

AutoText

AutoText is a feature in Word that allows you to enter text by typing just a few letters. This feature can be used for any passage of text that you need to insert on a regular basis. Common uses of AutoText are for creating an entry to insert your standard closing onto a letter or fax, or creating an entry to insert your full name or company name. Following is an AutoText entry that could be used on letters and faxes.

Yours sincerely,

Sue Austin
Marketing manager

Add AutoText to the QuickAccess Toolbar

From the Ribbon choose the **File** tab, then click **Options** from the left-hand side menu.

Click **Quick Access Toolbar**.

From the pull-down menu under **Choose commands from**, select **All Commands**.

Scroll down to **AutoText**.

Click **AutoText**, and then click **Add**.

The **AutoText** button will now appear in the Quick Access Toolbar.

Click **OK**.

Create a new AutoText entry

Select the text that you want to add to AutoText.

From the Quick Access Toolbar, choose **AutoText**, click **Save Selection to AutoText Gallery**.

Fill out the information in the Create New Building Block dialogue box:

Type in information (see following screen capture) for the AutoText entry. Click **OK**.
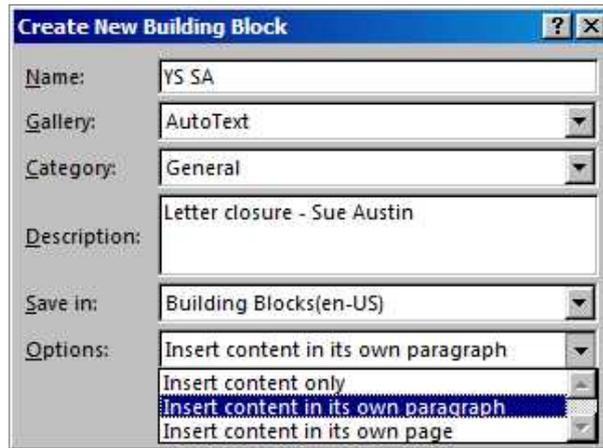
Once you have saved your AutoText entry you can use it by clicking on the AutoText icon on the Quick Access Toolbar or, if you remember the name you gave it, type in the name (YS SA) and press F3.

AutoCorrect

AutoCorrect is a feature of Word that automatically corrects common typing errors. This is a powerful tool because of the time it saves when proof reading, checking spelling and correcting a document. Have you ever noticed when typing that an error will magically correct itself? That's AutoCorrect at work. For example, if you type 'teh', when you hit the space bar it is corrected to read 'the'. Word has a range of common errors already included as entries and you can add your own to these. If you don't want a word automatically corrected, simply click **Undo** (or press **Ctrl+Z**).

Create an AutoCorrect entry

Set up the AutoCorrect feature in the same way as you set up the AutoText feature in the previous exercise.

Choose **AutoCorrect Options** on the Quick Access Toolbar.
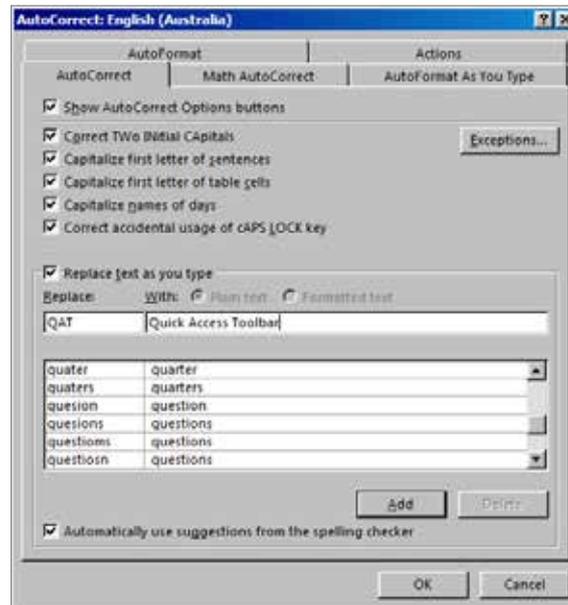
Type the incorrect version of the word in the **Replace** box.

Type the correct version in the **With** box. (Hint: You could set up an AutoCorrect entry for Quick Access Toolbar – this would save typing the full title out as you proceed with these instructions).

Click **Add**.

Click **OK**.

Remove an AutoCorrect entry

Select **AutoCorrect** from the Quick Access Toolbar, scroll and select the entry you wish to remove from the list by clicking on it.

Click **Delete**.

Click **OK**.

Header and footer

Headers and footers are used to add additional information to a document, such as the date, time and page number. A header appears at the top of a page and a footer appears at the bottom. The information that appears in headers and footers is the same on every page of a document, or within sections of a document.

Headers and footers appear on the printed document, but are only visible on screen in the Print Layout view or in Print Preview.

Insert a header and footer

From the **Ribbon**, choose the **Insert** tab, go to the **Header & Footer** grouping and click either **Header** or **Footer**.

Scroll down and view the variety of header and footer styles.

Choose **Blank (Three Columns)**. The Header & Footer Tools ribbon will appear and your cursor will be moved into the document's header or footer. Move the pointer over each of the buttons to see its function.
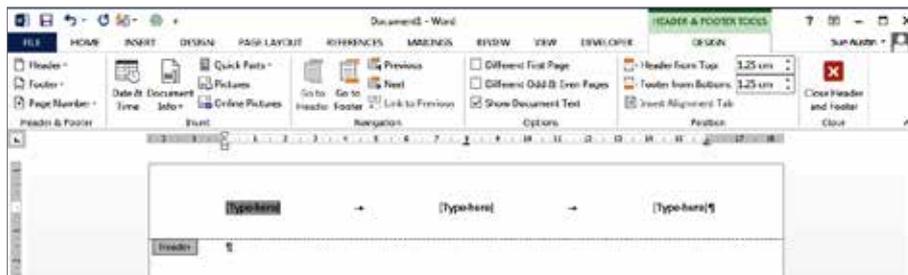
Note: This toolbar is only available if you are in a header or footer.

Experiment with the different Header & Footer Tools (more work will be done with headers and footers later).

Click **Close Header and Footer** to return to your document.

Edit the header or footer

From the **Ribbon**, choose the **Insert** tab, go to the **Header & Footer** grouping and click either **Header** or **Footer**.

Go to the bottom of the menu and choose **Edit Header or Footer**.

OR

In **Print Layout** view, the header and footer will appear as a lighter grey colour. To edit the header or footer, double-click on it and it becomes active.

To exit the header or footer double-click on the document again.

Tips: using the header and footer tool

From the **Header & Footer Tools** you can insert:

- page numbers
- the date
- the time with an option to update automatically.

Page numbering produces a more organised document in both hard and soft form. Page numbers allow a sequential movement through a document; for example, it is much easier to find page three than be asked to go to the page with a particular heading somewhere on the page.

Many organisations require the date or time to be automatically inserted into documents. This helps to track when documents were created or edited, acting as a form of version control.

Ensure that English (Australian) is selected as the language so that the day, month and year will be displayed in the correct order, then select a format from the left-hand side.

If you want the date or time to be updated each time you open the document, click **Update Automatically** when inserting the date or times. If this is not ticked, the date or time will not change when the document is updated. The Update Automatically feature needs to be used with care as it will change to the current date when the document is opened or printed, which negates the value of having a date stamp showing when the document was created.

From the **Quick Parts** button on the **Insert** grouping, you can insert the following:

- Fields, which allows insertion of a variety of information; however, the most useful category is document information where the filename, filepath, author and more can be added electronically to the header or footer. Once again this information assists with the organisation of documents, version control, document auditing and tracking changes.
- Building Blocks Organizer, which offers many useful style and design features, including watermarks, text boxes and AutoText.

You can also insert Pictures or ClipArt and switch between header and footer or go to header or footer in different sections.

Practice task 6

Open a blank document and create a header and footer that contains this information.

Header:	Patrick's Constructions, 345 Alderly Ave, GREENSLOPES QLD 4120 Phone: 07 3455 6320 Fax: 07 3455 6999 Email: reception@patricks.net.au
Footer:	Page number formatted as: Page -1-
Auto date formatted as:	12/05/2016 10:22 AM
Change the distance from the edge of the page to:	Header: 0.7 cm Footer: 1.0 cm

Remember to format and lay out the text so it looks attractive and professional.

Table headings

You can have tables that are larger than one page when creating documents. You can use the Heading Rows Repeat command to automatically show the table headings on each page.

You might use this command when you have a document that contains a client list, as shown below. The column headings have been automatically repeated on each page, making the information easier to understand.

Create a Heading Rows Repeat

Note: This command only works for automatic page breaks. It will not work if you insert manual page breaks within your table.

1. Create a table.

2. Select the rows that you want repeated at the top of each page. You must include the first row in the table.

3. Click the **Layout** tab, and then click **Repeat Header Rows**. The heading rows will now be repeated on each page.
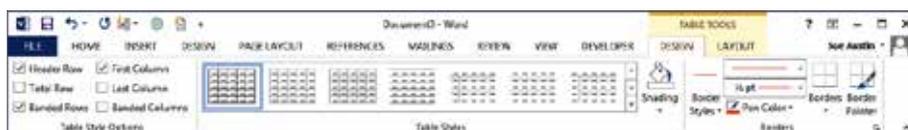
Note: This toolbar is only available if you are in a table.

AutoFormat

The AutoFormat feature in Word allows application of predefined styles to documents. The styles you can choose from are a standard component of Word. You can also create your own templates and styles.

Apply automatic formatting

1. To set up **AutoFormat** go to **Customize the Quick Access** Toolbar.
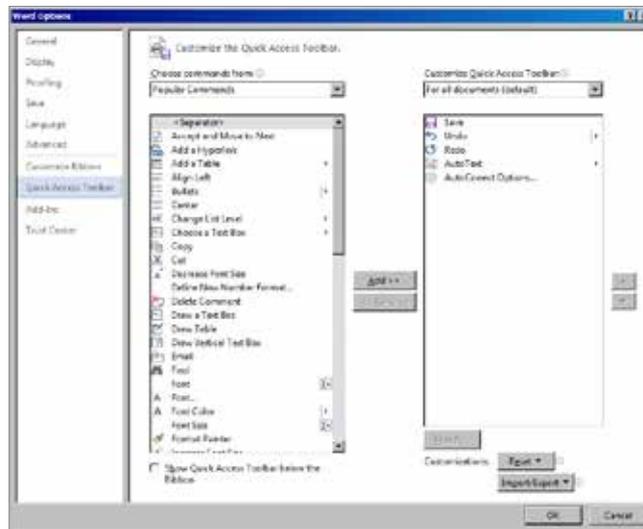
2. Go to Choose **commands from**, then **All Commands**. Choose
    AutoFormat, **Add**, **OK**

3. You can then choose to either:

    -   **AutoFormat now** – the default format style will be applied to the
        document.

OR

    -   **AutoFormat and review each change** – allows you to choose from a list of
        styles by clicking the **Style Gallery** button, then choosing a **Template**. You
        can then **Accept All**, **Reject All** or **Review Changes**.

Styles

When you are creating a document that uses consistent headings and text
styles, the most efficient way to format them is to create styles. A style is a set of
text formatting conditions that are applied to either characters or a paragraph.
The advantage of using style sheets is that when you change the style, Word
automatically changes all characters or paragraphs in the document that use
that style.

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

Style sheets are particularly useful for documents that contain a variety of
headings and text, such as reports. Creating style sheets for frequently used
documents such as letters, flyers and brochures will save you time because you can
just apply the style to each paragraph in the document.

Example: use of styles in a report

The next example shows how three different styles would be used in a report. You should try to give your styles meaningful names and in this case Major Heading, Minor Heading and Body have been used.
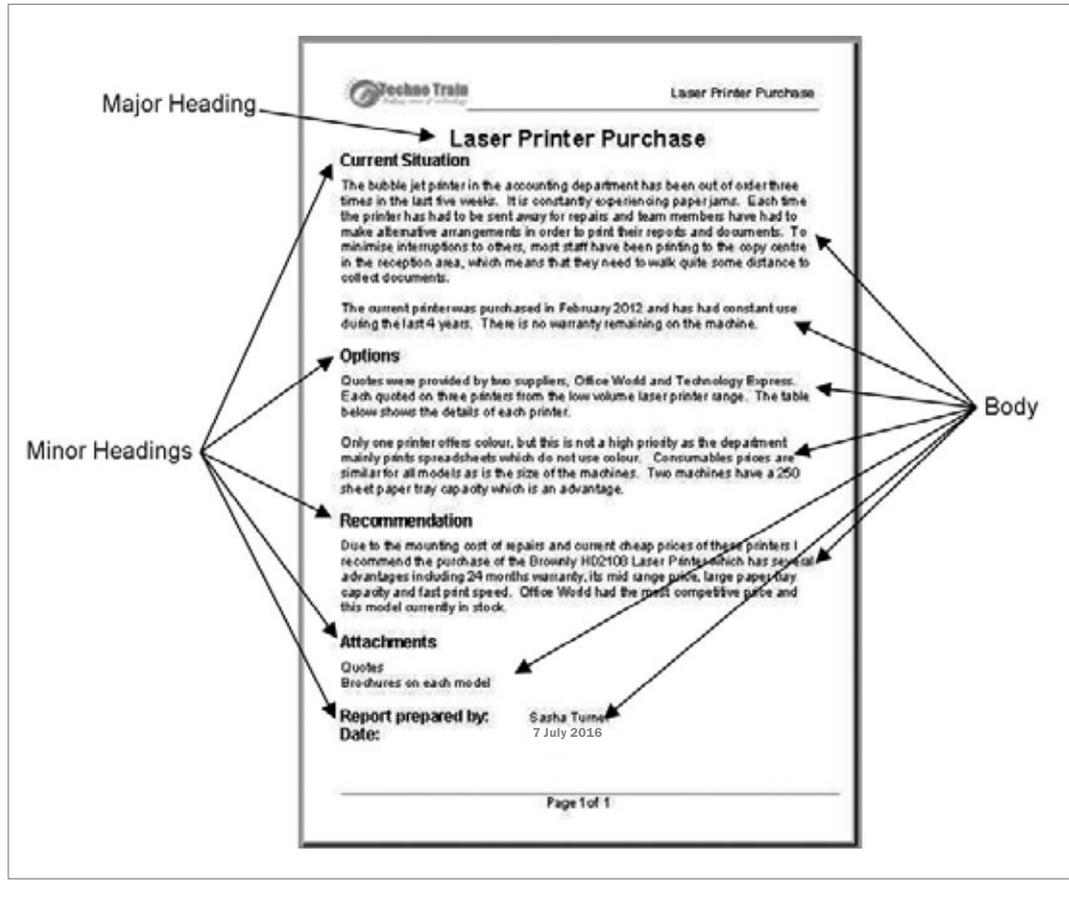
Identify a paragraph's style

1. Click in the paragraph.

2. From the **Ribbon**, choose the **Home** tab. Go to the **Styles** grouping.

3. Click on the small downwards arrow below the **Styles** box. The Styles window will appear. Each style is identified as either a paragraph (marked by the symbol: ¶) or character style (marked by the symbol: a). To apply a paragraph style you need to have your cursor at any point within the paragraph; to apply a character style you need to have the required text selected.

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

Create a new style

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

2. From the **Ribbon**, choose the **Home** tab, click on the small downwards arrow below the **Styles** box, and a list of styles will appear.

3. Under the list, select the **New Style** button on the left-hand side.

4. Give the style a name. Click **OK**.

This style will then appear in the Styles gallery.

Modify a style

1. Go back to the **Styles** box.

2. **Point** to each style and flag with a brief description of the styles will appear, in addition; an arrow indicating a menu will also appear.

3. **Click** on this arrow and choose **Modify**.

4. Modify as required. The format tile on the bottom left-hand corner of the dialogue box will allow you to format Font, Paragraph, Tabs, Borders and more.

5. Choose **OK**.

6. The change will apply to every paragraph or character that has that style applied to it.

Apply a style

1. Click somewhere on the paragraph you want to apply the style to.

2. Go to the **Styles** section of the **Home** ribbon.

3. Choose a style from the titles displayed, you will notice as the pointer hovers over a title that the style will be reflected in the active paragraph.

OR

Pull down the **Styles** box and choose a style from the list; you will notice as the pointer hovers over a style, its description will appear.

Default settings

By becoming aware of the default settings available in your software, you can maximise the efficiency of your data editing. Default settings determine the options that automatically appear when you go to perform a task.

You can change the defaults for a variety of tasks by clicking the **File** tab, and choosing **Options**. Review the contents of each option until you find the setting you want to change.

Some examples of defaults you can set are provided below.

Default file location

The folder that files will automatically be saved in.

Default printer

The printer a document will be sent to when you click the print icon.

Default language

Allows you to set the language for your documents; for example, English (Australia).

Practice task 7

1. Access and download autoformat-practice.docx at: http://chilp.it/33e7fe0. Practise applying the following style sets from the **Styles** drop-down menu to the document:
   - Manuscript
   - Elegant
   - Distinctive

2. Access and download styles-practice.docx at: http://chilp.it/f2f1f66. This is a project update report for a construction company. Create these styles.

Document text	Style name
Project update as at 12 February 2012	Report name
Golden Beach Eco Resort Milne Towers Beachside Resort Apartments	Report name
Sales Constructions	Sales and construction
All other body text	Details

Practise modifying the formatting of the styles until you get an easy-to-read, attractive layout.

Understand a document's formatting

One of the greatest challenges you may face when using documents someone else has created is working out how they achieved the various effects. Sometimes it can be hard to remember how you did something in your own documents. One of the reasons this can be so challenging is that Word provides so many ways to achieve the same effects.

One of the most useful tools in Word is the Show/Hide option. The Show/Hide button ¶ on the Home tab allows you to see the document's non-printing characters. The non-printing characters let you see a range of information, including where the paragraph ends, where spaces have been placed and where the Tab key has been used. When you become familiar with the non-printing characters, you can use them to check that the formatting of your document is consistent.

Below are some common non-printing characters.
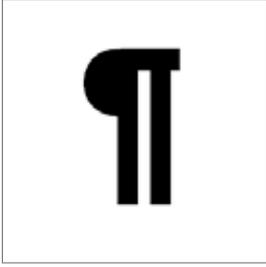
Paragraph symbol (also known as pilcrow)

This mark is created when you press the Enter key to end a paragraph. In Word a paragraph can be several lines of text or just one short line with Enter pressed at the end. Word does not look at paragraphs like we do; it relies on the use of the Enter key to know where they start and end.
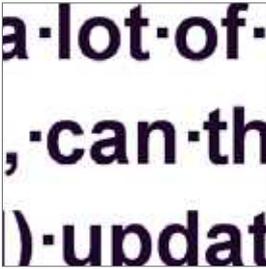
Space

This small dot indicates that the Space bar has been pressed. You can tell how many times the Space bar has been pressed by the number of dots.
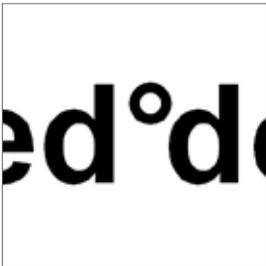
Non-breaking space

A non-breaking space can be created by pressing Ctrl+Shift+Space. You use a non-breaking space if you want to ensure that two or more words are always printed on the same line and never automatically separated by Word's automatic line breaks.
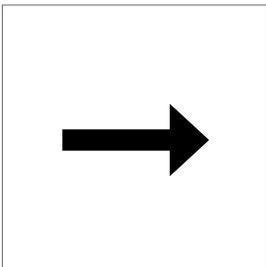
Tab space indicator

This symbol is used for two purposes in Word. It is used to indicate that the Tab key has been pressed on the keyboard, and it is also used in numbered or bulleted lists as the tab space between the number or bullet and the text.
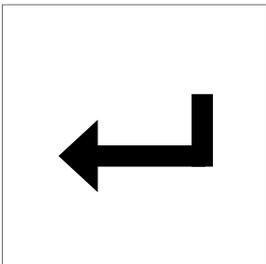
Line break

A line break can be created by pressing Shift+Enter and it is used to start a new line without starting a new paragraph. This means that when you apply formatting (for example, indenting) to the text, Word will treat the lines as one paragraph.

Example: non-printing characters

This example shows how easy the non-printing characters make it to see how a document was created. You can see that several of the effects have been created using an inefficient method that may cause problems if the document is edited at a later date.

When you look at the document, you can see that the operator has not used good word-processing practice. The extra spaces, used to create indents, and the manual line breaks will not only have taken more time to produce but are bound to become a nightmare for anyone who is editing the material. This table lists the mistakes and the correct method that should be used.

Mistake	Correct method
Incorrect number of spaces between words	Only press space bar once between words.
Enter pressed at end of each line in section of text that should only be one paragraph	Allow the text to auto-wrap as you type. This will ensure that changing the font or other formatting will not cause problems later.
Spaces used to indent text	Create the text as one paragraph, then use the **Increase Indent** button, in the **Paragraph** grouping under the **Home** tab.
Changing font size of paragraphs between sections of text to adjust the gap between lines	Use the **Line and Paragraph** Spacing button, in the **Paragraph** grouping, rather than having a blank line between paragraphs.

Use functions for efficiency and consistency

Using various text, graphic and page formatting options will help you increase your efficiency and consistency.

You should become familiar with each of the following functions:

- Indentations
- Page numbers
- Captions
- Footnotes or endnotes
- Borders

- Spacing
- Typeface styles, point size and colour
- Bullets and numbering
- Annotated references

Indentations

The indent of a line of text or paragraph is how far it is positioned from the margin. Text can be indented on either the left or right sides of the paragraph or both. Indenting is useful for drawing attention to sections of text. It can be used very effectively to emphasise lists of data, including bulleted lists.

Indent a section of text

From the **Ribbon**, choose **Page Layout**, and go to the **Paragraph** grouping.

Enter the indent amounts and choose the special type if applicable.

Click **OK.**

OR

Click the small downwards arrow next to **Paragraph** on the **Home** tab and the following dialogue box will appear.
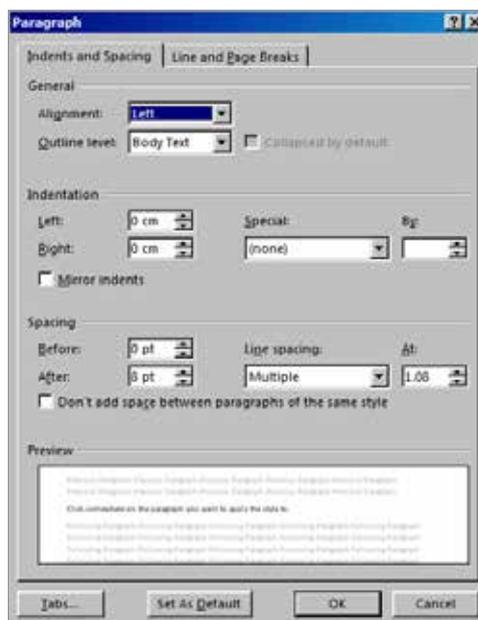
Example: indented text

View the following example to see varying indents.

This paragraph has no indenting applied. You can see that it uses up all the space to both margins.

> This paragraph has been left-indented by 1 cm, which means that all the text is left-aligned 1 cm in from the margin.

This paragraph has been right-indented by 1 cm, which means that the text stops 1 cm from the right margin.

> This paragraph has been indented by 1 cm on the left and right sides. Notice how neither edge reaches the margin.

> This paragraph has a first line indent applied. This style of indent used to be popular
for letters but is rarely used now, except in books and journals.

This paragraph has a hanging indent applied. That means the first line starts on the margin
> and the following lines are indented.

Spacing

Spacing refers to the amount of space around each line or paragraph of text. You can set line spacing to be either single, double or a specific amount and you can also set the amount of space before or after a paragraph. Using the spacing option allows you to specify exact vertical distances and gaps between paragraphs.

Insert spacing in a section of text

1. From the **Ribbon**, choose the **Page Layout** tab. Open the **Paragraph** dialogue box and select the **Indents and Spacing** tab.

2. Enter the required **Before**, **After** and **Line spacing** amounts.

3. Click **OK**.

Page numbers

As already mentioned, page numbers can be inserted into the header or footer of a document. Using a consistent style and position for page numbers helps standardise documents and enables the reader to find information easily.

Typeface styles, point size and colour

Your word-processing software has many fonts to choose from and you can apply a range of sizes, colours and effects to these fonts. Changing the size or colour of a section of text can add impact to your document.

As you learnt earlier, be careful not to overuse these features as too many fonts can make a document hard to read. The document type, purpose and audience are important considerations in font selection. You would most likely only use two to three different fonts, sizes or effects in a business report, one for the major headings, one for the minor headings and one for the body text. However, if you were preparing a newsletter or flyer, you may use several fonts to make important information stand out and look eye-catching.

The most frequently used text formatting functions are included as buttons on the Home tab.

Change font style

For the full range of font formatting options use the Font drop-down menu.

This gives you access to additional effects and a handy preview window so you can see how your changes will look before you commit to your choice.
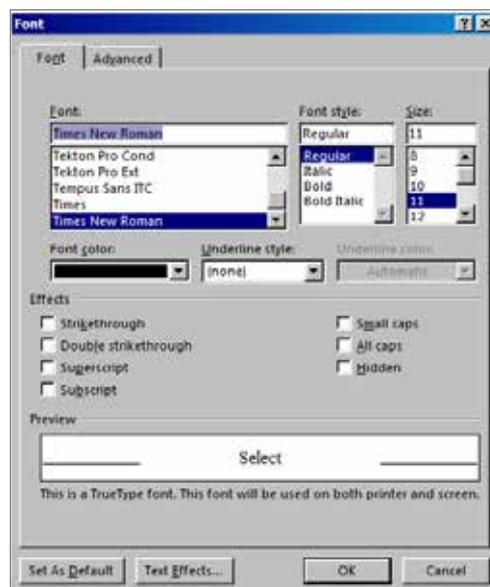
1. Select (highlight) the text to be formatted.

2. To change the font type or size, in the **Font** grouping of the **Home** ribbon click on the drop-down arrows beside the font or size buttons and select from the list.

3. **Bold**, **Italicise** and **Underline** the font by clicking on the appropriate button.

4. To apply a font colour, click on the arrow next to the **Font colour** symbol and choose a colour from the palette shown.

5. The selected text will be changed to reflect your selections.

Captions

Captions are words you can add to tables, graphic objects, Clip Art and pictures. They can be used to guide the reader, either to help them identify which graphic item you are referring to in the text or give details about something exhibited in the text. Captions are used to name diagrams or data in tables (in reports) or in newsletters to identify people in photos.
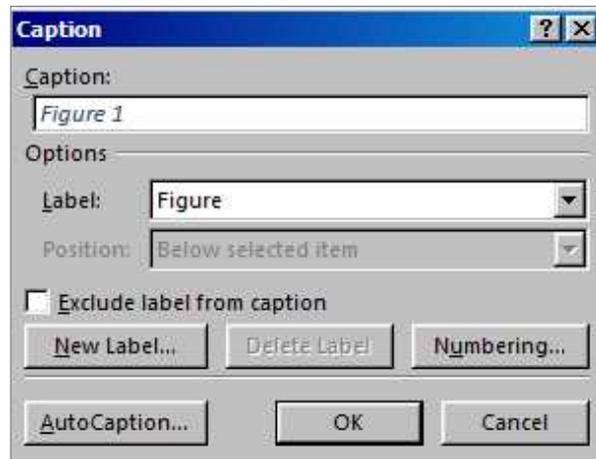
To add a caption:

1. Point to the picture, graphic or table that you want to add a caption to.

2. From the **Ribbon**, choose the **References** tab.

3. Click **Insert Caption**.

4. Select a **Label** from the list or click **New Label** to make a new one. The label you have selected will appear in the caption box. You cannot delete this part of the caption at this stage.

5. Click in the **Caption** box and type your caption.

6. Select the position for the caption, either above or below the selected item.

7. Click **OK**.

8. To remove the label from your caption, click on the caption that has been created and edit the text as you would any text in the document.

Bullets and numbering

Using bullets and numbers to clearly separate points in lists can improve the presentation of text. A variety of number formats and bullets are available in your software and you can even import pictures to use as bullets. Here are some examples of bullets.

Numbers

Numbers are generally used to denote items that are in order. For example, if you were writing a list of the top three sales people for an organisation, you could write:

1. James Harker
2. Rose Marcus
3. Peter Jenz

Numbers are also used when creating instructions for people to follow.

Bullets

Bullets are used to list items that are not in any particular order but need to be shown clearly in a group.

For example, a company might include a list of staff who attended a workshop in the following format:

• Hank Palmerston
• Ally Holden
• Thanh Ng

Format a list

1. From the **Ribbon**, choose the **Home** tab.

2. Click on the drop-down menus for **Bullets** or **Numbering** in the **Paragraph** grouping.

3. Choose **Define New Number Format** or **Define New Bullet**.

4. Make the desired changes.

5. Click **OK**.

Footnotes and endnotes

Footnotes and endnotes are used to provide additional information, clarification or references in printed documents. Footnotes and endnotes are identified by a small superscript number after the text. They are commonly used when quoting a book or website or acknowledging an idea from another source. Footnotes are placed on the bottom of the page with the referenced text, while endnotes are positioned at the end of the section or document.

When creating footnotes and endnotes, you must use a consistent style of referencing. You will need to ask your supervisor or refer to your organisation's style guide for the preferred referencing format.

Word will automatically assign the footnote and endnote numbers and update them should you remove or add any additional footnotes.

Insert a footnote

1. Move to the position in the document that requires the footnote.

2. Choose **References** from the ribbon.

3. Select **Insert Footnote**.

4. You will be moved to the bottom of the page and can type the details for the footnote beside the superscript number.

Insert an endnote

1. Follow steps 1 to 2 from the footnote instructions.

2. Click on the small downwards arrow next to **Footnotes** to launch the **Footnote and Endnote** dialogue box.

3. Choose the location for the endnote, either **End of document** or **End of section**.
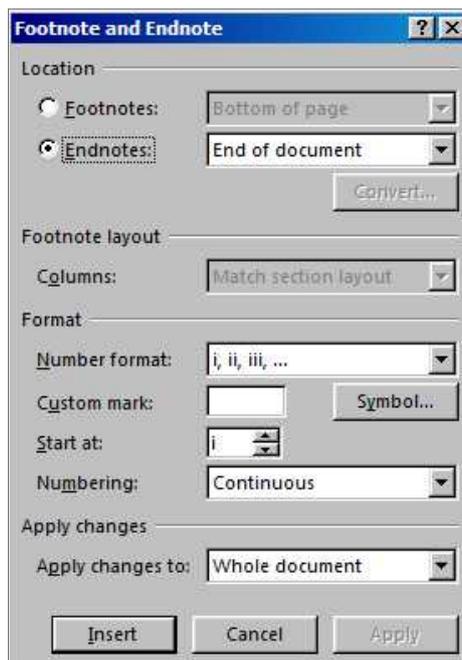
4. Choose a format for the endnote.

5. Click **Insert**.

6. You will be moved to the end of the document or section and can type the details beside the superscript number.

Remove a footnote or endnote

1. Select the superscript number indicating the footnote or endnote.

2. Delete the number – the footnote or endnote will be deleted.

Annotated references

When you design a document that will be edited by another person, leaving some notes or comments to guide them in using the document can be helpful. For example, you might tell the document user where missing information needs to be entered or give details about the formatting.

This comment tells the user how the space above the paragraph was created.
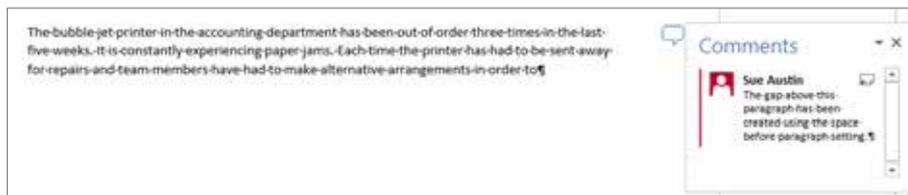
Create comments

1. From the **Ribbon**, choose the **Review** tab.

2. Click **New Comment** in the **Comments** grouping.

3. A comment box will appear and you can type your comment in the box provided.

View comments

1. From the **Ribbon**, choose the **Review** tab.

2. In the **Tracking** grouping, click the drop-down menu next to **Show Markup** and check **Comments** is ticked.

Borders

You can use borders to organise or emphasise parts of a document. In Word, you can add a variety of borders to paragraphs, selected text, tables or the entire page. Borders can be used in documents such as newsletters to accentuate and draw attention to important items; for example, an advertisement for an event.

When creating promotional documents such as flyers, brochures and invitations, the border type selected will contribute to the style of the document. For a formal look, choose one of the line styles or, for a fun look, choose an art (picture) border.

Create a page border

1. From the **Ribbon**, choose the **Design** tab, then click **Page Borders**.

2. Select the **Setting**, **Style**, **Colour, Width** and **Art**. You can choose which sides have a border by clicking on the borders in the **Preview** on the right-hand side.

3. Click **OK**.

Create a paragraph border

1. Select the paragraph or paragraphs you want a border around.

2. From the **Ribbon**, choose the **Home** tab, then go to the **Paragraph** group.

3. Click the **Borders** drop-down menu and select **Borders and Shading**.

4. Select the **Setting**, **Style**, **Colour** and **Width**. You can choose which sides have a border by clicking on the borders in the **Preview** on the right-hand side.

5. Experiment with paragraph shading as well.

6. Under Apply to, select **Paragraph**, and then click **OK**.

Consistency with other business documents

Although the functions explained in this topic provide many options for formatting word-processed documents, it is important to ensure you follow your organisation's style guide. This will guarantee that your documents have a consistent appearance and present a professional corporate image.

Example: organisational style guide

Here is an example of a style guide for Techno Train.

Techno Train

Making sense of technology

Style guide

Templates

Templates are to be used when producing documents. Available templates are:

- letter
- fax
- memo
- invoice
- meeting agenda
- meeting minutes.

The company logo is to appear on all documents produced. Available Logos are:

- Techno train Logo.bmp
- Techno train Logo.jpg

Employees have access to the Data drive (H:\), that contains a folder called 'logos and templates'. All the standard document templates and logos for the company are stored in this folder. Ensure you do not save over these templates. Printed copies of these templates are provided in Appendix A of this guide.

Document Formatting guidelines

Letters

- All pages to be printed on Techno Train letterhead
- Letters are to be formatted in full block, open punctuation style
- Text is to be formatted in Arial font, size 11
- Left and right margins are to be 2.5cm
- Page numbers are to be on all pages except the 1st page

Faxes

- Use Techno Train fax template
- Faxes are to be formatted in full block, open punctuation style
- Text is to be formatted in Arial font, size 11
- Left and right margins are to be 2.5cm
- Page numbers are to be on all pages

Memos

- Use Techno Train memo template

Flyers

- Company logo to be included on all flyers
- Company phone number, email address and web address to be included on all flyers

Forms

Refers to any document used to collect information from staff or customers; for example, course registration forms, customer satisfaction surveys and employee timesheets.

- Company logo to be included on all forms
- Company phone number, address and email address to be included on all forms
- Regularly used forms to be saved as templates

Invoices

- Use Techno Train invoice template
- Ensure that formulas are not edited and amounts are automatically added

If you are unsure of how to format a document please consult your supervisor.

Naming and storing of files

Documents created are to be stored on your network drive in folders relating to the type of document, e.g. letters, faxes, flyers. Documents relating to a particular customer are to be saved in a folder with that customer's name. File names should include the date of creation and an indication of what the document is about.

Example: J:\Flyer\Workshop 23May16.doc

            J:\Sullivan Consulting\course confirmation 12 June16.doc

Email disclaimer

This email is intended for the use of the addressee only and may contain confidential information. If you are not the intended recipient, you are hereby notified that any use or dissemination of this communication is strictly prohibited. The sender disclaims liability for any errors, omissions, viruses, loss and/or damages arising from using, opening or transmitting this email. If you received this transmission in error, please notify Techno Train immediately on (07) 5555 5555, then delete this email.

Practice task 8

1. Make the indent changes in a document as outlined here. Save and print your completed document.

   This paragraph has no indenting applied. You can see that it uses up all the space to both margins.

   This paragraph has been left-indented by 1 cm, which means that all the text is left-aligned 1 cm in from the margin.

   This paragraph has been right-indented by 1 cm, which means that the text stops 1 cm from the right margin.

   This paragraph has been indented by 1 cm on the left and right sides. Notice how neither edge reaches the margin.

   This paragraph has a First Line indent applied. This style of indent used to be popular for letters but is rarely used now, except in books and journals.

   This paragraph has a hanging indent applied. That means the first line starts on the margin and the following lines are indented.

2. Create a blank Word document and insert three Clip Art items of your choice and practise adding captions to them.

3. Practise creating footnotes by re-creating the previous example or by inserting them into existing documents.

4. Open a blank document and practise inserting comments and displaying and hiding them.

Summary

1. When creating a document, you first need to clarify the purpose, audience and information requirements.

2. You need to consider a range of design aspects and elements when working out the structure and layout of your document.

3. Design concepts need to be incorporated into your documents to enhance their readability and appearance.

4. The style and layout of documents should follow your organisation's requirements.

5. Create and use styles to ensure headings and text styles are formatted consistently.

6. Use automatic functions to increase the efficiency of your work.

7. Use design and formatting functions to ensure consistency of design and layout.

<div style="background:#5b8fc9; color:white;">

Learning checkpoint 2
Design word-processed documents

</div>

This learning checkpoint allows you to review your skills and knowledge in designing word-processed documents.

Part A

1. Create an A4 flyer advertising the Techno Train Training Centre Open Day. Ensure you follow the guidelines in the style guide and use the following information. An excerpt from the Techno Train style guide is shown in Topic 2, section 2C. Include the Techno Train logo in your flyer, which can be accessed and downloaded either by scanning the QR code provided or at: http://chilp.it/a646f9f.

    Information to be included on the flyer:

    Date: 5 June 2014

    Time: 9 am – 3 pm

    Phone: 07 3876 1333

    Email: info@technotrain.com.au

    Web: www.technotrain.com.au

    Address: 22 Hart Street, CHERMSIDE QLD 4032

    Activities:

    Meet the trainers

    Ask an expert

    Short training sessions:

    Computer introduction: 45 minutes

    Using a digital camera: 45 minutes

    RSVP: 30 May 2014

2. Write a one-page report about the document you have created. Include the following information:

    - A description of the purpose and audience of your document
    - The design aspects and elements you considered when creating the document and how you applied them; for example, white space, graphics, boxes, simplicity, balance

3. Research a topic of your choice on the internet and write a one- to two-page report about it. Examples of topics you could choose include the latest fashion trends, a comparison of car makes and models, a new-release movie, information about a new software package or computer game.

    Your report must include:

    - clear descriptive headings

- at least two footnotes referencing the websites that were used in your research
- a footer showing the page number and the current date
- at least one graphic or table.

Ensure that you create and use style sheets to format your document. Save and print your report.

Part B

1. Access and download landscaping-newsletter.docx either by scanning the QR code provided or at: http://chilp.it/d727ba2.

2. Examine the document and list at least 10 design problems or errors.

3. Re-create the document using the principles of design and layout you have learnt. You can either re-enter all the information or edit the existing file. Save and print your new version.

Part C

Create a document that allows you to demonstrate using the following functions:

- At least two types of indents
- Two different bullet styles
- At least three different fonts
- A graphic with a caption
- Two examples of borders

Save and print your document.

Part D

1. Give an example of when each of the following automatic functions can be used.

   - AutoText

   - Table headings

   - AutoFormat

   - Headers and footers

2. List five problems you could encounter when creating documents if you do not make use of automatic functions.

Topic 3
Add tables and other data

Tables are used in documents to display information and can be used effectively when creating forms. Just like most functions performed in Word, you can achieve your objectives in several ways. For this reason this unit provides a range of instructions for the various techniques available, including right mouse clicks.

In this topic you will learn how to:

3A   Insert a standard table into a document

3B   Insert and delete columns and rows

3C   Insert images and other data

3A Insert a standard table into a document

A common formatting element used in word processing is tables, whereby data is presented in rows and columns. A table is very simple to insert and manipulate by adding additional rows and columns or by formatting its appearance and contents.

Create a table

1. Move the cursor to where you want the table inserted.

2. From the **Ribbon**, choose the **Insert** tab. Select **Table**.

3. From the pull-down menu you have a number of options to create a table. You can:

   - Move the pointer over the grid to choose the amount of rows and columns that you require – as you do this a preview of your table will appear in the document. If you choose not to insert anything this will disappear.

   - At the **Insert Table** menu tool enter the number of columns and rows, then click **OK**. A table will now be inserted in the text.

   - Select the **Draw Table** option – this allows you to draw the table directly into the document.

   - You can enter a spreadsheet into the document and input data directly.

   - **Quick Tables** offers predefined templates that you can choose from.

4. You can now click into the cells of the table and enter your data. To move between cells, use **Tab** to move right, **Shift+Tab** to move left, arrows to move up and down or click the mouse in the required cell.

Tip: undo an action

When experimenting with the different tools and options remember you can use your undo tool on the Quick Access Toolbar or press **Ctrl+Z** to undo any action.

Select parts of a table

Before you can apply any formatting or manipulate data in any part of a table, you need to be able to select the specific parts you want to format.

When you click into the table you have created, you will see a new tab appear on the right side of the Ribbon called **Table Tools**. Under **Table Tools**, there are two sections called **Design** and **Layout**. **Design** gives you access to many different design tools such as **Shading**, **Borders** and **Table Styles**. **Layout** gives you access to other features such as inserting or deleting rows and columns, changing column width, sorting etc. Spend some time familiarising yourself with the different features available in these areas.

The following information gives you further details about working with tables.

Select a block of cells

Put your cursor into the first cell in the block of cells you want to select.

Click and drag your cursor over the remainder of the block.

Select a row

Move your cursor to the left edge of the first row to be included in the selection. The cursor will change to a **white** arrow.

Click and drag down the table to select the required number of rows.

Select a column

Move your cursor onto the top edge of the first column to be included in the selection. The cursor will change to a **black** arrow.

Click and drag across the table to select the required number of columns.

Select the whole table

Move your cursor to the top left-hand corner of the table. The cursor will show a **four-arrow symbol**.

Click the symbol and all cells in the table will be selected.

Resize columns and rows

In order to maximise readability and accommodate information needs, it may be necessary to resize the columns and rows of the table. There are several methods you can use to resize rows or columns, including those mentioned here.

Using the mouse

Move your mouse to the right edge of a column or the bottom of a row you want to resize. The cursor will change into a **two-headed resize** arrow.

Click and drag the column or row to the required width or height.

(Note: This method will change the width of adjacent columns.)

Select a column or row to resize.

From the **Ribbon**, choose **Table Tools**, select **Layout**. Use the pull-down menu, from the **Cell Size** grouping to access **Table properties**.

Experiment with the **AutoFit**, **Sizes** and **Distribution** (makes all columns or rows equal).

If you click the drop-down menu you can click on the **Previous Column** or **Next Column** buttons to change the width of adjacent columns.

Select row and repeat these actions to modify its size.

This applies to columns only. Move the pointer to the hashed area on the ruler to resize. The pointer will change to a **double-headed arrow**.

(Note: This method will maintain the width of adjacent columns.)

Use the Table Tools Design tab

The Design tab in Table Tools can be used to perform a range of formatting tasks on tables.

Note: This tab is only available if your cursor is in a table.

Use the different options to experiment with table design and style.

Format table borders

You can apply a variety of different borders to table cells. It is also possible to select which parts of one cell have borders displayed.

To apply borders

1. Select the cell or range of cells to which you want to apply the border.

2. Click the drop-down ⏷ arrow beside **Borders** to see border options. Click the border you want to add or remove.

To change the border style

1. Select the cell or range of cells you want to change.

2. Click the drop-down ⏷ arrow beside **Borders**, choose **Borders and Shading**.

Format table shading

In addition to adding borders to particular cells, you can also individually select block shading of cells.

To apply shading

1. Select the cell or range of cells you want to apply shading to.

2. Click the drop-down ⏷ arrow beside the **Shading** button and then click on the shading you would like.

Alternatively use the **Table Styles** available.

Use the Table Tools Layout tab

The Layout tab in Table Tools can be used to perform a range of layout tasks on tables.

Note: This tab is only available if your cursor is in a table.

Merge and split cells

Merging allows you to join cells together. This might be necessary if you want to have a title across the top row of the table and a number of columns underneath. Splitting lets you break one cell into several parts. There are several ways to merge and split cells:

- Go to the **Merge** grouping in the **Layout** tab.
- Experiment with the options.

Align the contents of cells

Just as you can set the alignment of text or graphics, you can change the alignment for the contents of cells:

- Go to **Alignment** grouping in the **Layout** tab.
- Experiment with the options.

Sort

You can sort data in lists or tables into text, number or date order. This technique allows you to enter data without having to worry about the order; you can take care of this after the data is entered.

Apply sorting

Highlight the list of items to be sorted.

Choose **Sort** from the **Layout** tab.

Choose the sort type from **Text**, **Number** or **Date**. If you are sorting data in a table that has a header row, choose either **Header row** or **No header row** and then click **OK**.

Practice task 9

1. Experiment with the different table creation tools. While there might be an instance when you could use any of them, you will probably favour one. Once you have created the table you will notice that, while your cursor is in the table, other ribbons – Table Tools: Design and Layout – will be available to you. Explore these new menus. Save your table so that you can use it in the following tasks and activities.

2. Using the table you created, experiment with different border styles and applications.

3B Insert and delete columns and rows

There may be occasions when you need to add or delete rows or columns in a table. Following are instructions for performing these tasks using the mouse and menus.

Using the mouse to insert columns

1. Position cursor in the column adjacent to where you wish to create a new column.

2. Click the **right mouse button** and a menu will appear.

3. Select **Insert** and choose where you wish the new column to be inserted.

Note: If you require more than one column, once you have inserted one column press Ctrl+Y to repeat the insertion. You can press Ctrl+Y for all the columns you need.

Using the mouse to delete columns

1. Position your pointer on the top edge of a column and the pointer will change to the column select ⬇ arrow. Click the **left mouse button** and the column will be selected.

2. Click the **right mouse button** and select **Delete Columns**. The selected column will be deleted.

Using the mouse to insert rows

1. Position cursor in the row above or below where you wish to create a new row.

2. Click the **right mouse button** and a menu will appear.

3. Select **Insert Above** or **Insert Below** and the new row will be inserted.

Note: If you require more than one row, select the number of rows that you wish to insert before clicking **right mouse button**.

Using the mouse to delete rows

1. Position your pointer on the left edge of a row and the pointer will change to a white ⇖ arrow. Click the **left mouse button** and the row will be selected.

2. Click the **right mouse button** and select **Delete Rows**. The selected row will be deleted.

3. Use the menu to insert or delete rows or columns.

4. From the **Ribbon**, choose the **Table Tools** tab, and select the **Layout** tab.

5. Select **Rows & Columns**.

Experiment with the options.

Practice task 10

Using the instructions provided in this section, create a table with seven rows and three columns. Edit the table so that it is similar to this example. Save and print your document with the name 'Table Practice'.

3C | Insert images and other data

One of the advantages of using word-processing software to produce documents is that you can import text and data from various programs. Importing information saves time by not having to re-enter information. Text and image import functions are particularly useful when creating newsletters and reports where the content may come from several sources. A range of items known as graphics can be inserted into documents. Commonly used graphics include Clip Art, Pictures, AutoShapes, Drawing Objects, Graphs and Charts.

You can import data in the following formats into Word:

- Clip Art
- Digital photographs
- Scanned photographs and logos
- Tables, graphs and charts
- Drawing and graphics tools
- Data from other software applications
- Files
- References
- Quotes

Clip Art

Clip Art is the name of a collection of graphics included in Microsoft software that can be inserted into documents. Word has a variety of Clip Art images available, and Microsoft also has a large database of Clip Art items on offer for download from its website.

Insert Clip Art into your document

1. Move the pointer to the position in the document where you want to place the image.

2. From the **Ribbon**, choose the **Insert** tab and select **Online Pictures**.

3. The **Bing Image Search** dialogue box will be displayed. Type a word to describe the image you are searching for in the **Search** box; for example, 'clip art animals'. Results can be **Clip Art**, **Photographs**, **Movies** or **Sounds.** You can choose what types of results should be returned.

4. Click **Search**.

5. By hovering the mouse over an image, a magnifying glass will appear and, by clicking on it, an enlarged preview of the image will appear.

6. When the list of results appears, click on the image you wish to insert. Then adjust the size and position the image as required.

Digital photographs

Inserting photographs into a document is easy when they are in a digital file format. Your word-processing software will recognise a large range of file formats, including Windows Bitmap (BMP), JPEG File Interchange Format (JFIF) and Graphics Interchange Format (GIF). Digital photos are often used in flyers and newsletters.

Insert a digital photograph into your document

1. Move the insertion point to the position in the document where you want to place the image.

2. From the **Ribbon**, choose the **Insert** tab, and click **Picture** in the **Illustrations** grouping.

3. Under **Pictures library, go** to the drive and folder containing your picture, then click on the picture you want, and click **Insert**.

4. Adjust the size and position of the picture as required.

Scanned photographs and logos

When you have a hard copy (printout or photograph) of a picture or logo and you want to use it in a document, you can import it using a scanner. The quality of the image will depend on the quality of the original hard copy and the settings on your scanner.

Insert a scanned image into a Word document

Move the insertion point to the position in the document where you want to place the image.

From the **Ribbon**, choose the **Insert** tab. In the **Text** grouping, click **Picture**.

Browse to the drive and folder containing your pictures, then click on the picture you want, click **Insert**.

Adjust the size and position of the image as required.

Your organisation's scanner may be set to save scanned items in a particular folder as a graphics file. You can import these images into your document by following the instructions for inserting digital photos.

Tables, graphs and charts

When creating documents, tables, graphs and charts can be used very effectively to present data. Formatting information as tables, graphs or charts allows you to break the monotony of long passages of text.

The process of importing data from an existing Excel spreadsheet is explained in Topic 4. The following instructions are for creating a new chart as part of your current Word document.

Insert a chart into a document

1. From the **Ribbon**, choose the **Insert** tab, choose **Chart** from the **Illustration** grouping.

2. Choose the style of chart that you wish to insert.

3. The following chart and spreadsheet will be displayed ready for you to insert your data.
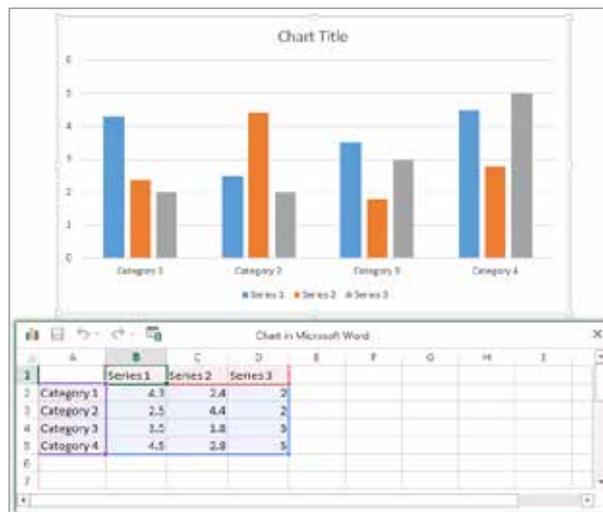
4. Replace the information shown in the sample spreadsheet with your own data. **Delete** any additional information that you do not need.

5. Your chart will reflect any changes made to the data sheet.

6. You can edit the chart or change the chart type by once again double clicking on the chart to launch editing mode, then using the **Chart** menu options provided.
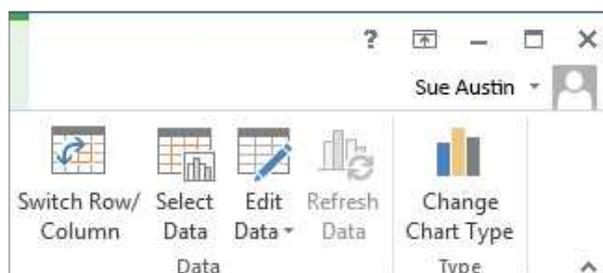
Note: This **Chart Tools** menu is only available if you have a chart selected.

Chart Tools allows you to change the type of chart displayed, manipulate the way the data is presented and vary the layout for the chosen chart.

7. The **Design** and **Format** tabs allow you to change the presentation and layout of your chart. From the **Format** tab, click the drop-down ▾ arrow above **Format Selection** (currently showing as **Chart Area** in the figure below); as you choose each option from the menu displayed, that part of the chart will be selected. This will give you the opportunity to familiarise yourself with the terminology associated with charts. As each area is selected you can change the format.

8. Experiment with the remaining tools in **Chart Tools**.

Practice task 11

Open a new blank Word document.

- Insert a chart using the previous instructions.
- Enter this data into the datasheet.

Location	May	June	July	August
Melbourne	50	23	43	35
Perth	70	37	22	56
Sydney	90	91	82	67

- Using the Chart menu, change the chart type to a 'Line with markers displayed at each value'.
- Insert a couple of new lines in your document and create a chart using your own data (make it up if you want). Choose a chart type that you think looks good and makes the data easy to read. Don't forget to include a title above the chart that describes it.
- Save the file as 'chart practice'.

Drawing and graphics tools

Word comes with a range of drawing and graphics tools. You can insert pictures, Clip Art, Word Art, text boxes or an organisation chart and create shapes including lines, arrows, rectangles and ovals. Items created or inserted using graphics and drawing tools can serve a range of purposes. For example, they can be used to clarify information (such as an organisation chart) or to add interest or definition using lines or autoshapes.
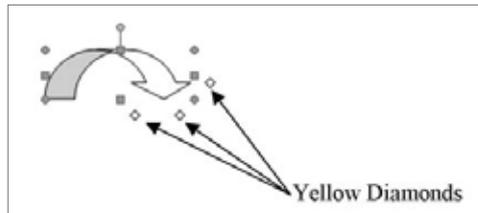
Insert drawing and graphics tools

1. From the **Ribbon**, choose the **Insert** tab.

2. Click on the **Shapes** menu.

3. Choose a graphic and draw into your document.

4. The blue circles and squares allow you to resize, the yellow diamonds allow you to alter the shape.
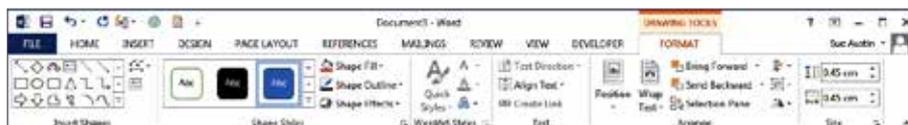
Note: The **Drawing Tools** tab is only available when a drawing is active.

Drawing canvas

The drawing canvas has advantages and disadvantages. To be as efficient as possible you should use the canvas in any situation where you have more than one graphic item that you need to move together. If you are only inserting one item, you do not need to use the drawing canvas.

If you are using a graphic or drawing tool and you do not want to keep the drawing canvas, hit the 'Esc' key on the keyboard when the canvas first appears and it will be removed. You can then draw or insert the graphic wherever you like.

The advantages and disadvantages of using the drawing canvas are outlined below.

Advantages of the drawing canvas

The canvas has its text wrapping properties set to 'In line with text'. This means that the text will wrap around the canvas.

If you insert more than one graphic item onto the same drawing canvas, all items will be moved together when you change the position of the drawing canvas in the document. This means you do not have to group the items.

Disadvantages of the drawing canvas

Word determines the initial size of the canvas. If you are only inserting a small graphic, you will need to resize the canvas so that there is not a lot of blank, wasted space.

If you insert multiple objects on canvases in the one area of a document, the canvases can end up on top of each other and make it difficult to select some of the objects individually.

Resize and move graphics and objects

1. Click on the object to be resized and resizing handles will appear on the corners and sides of the object. Position the pointer over one of the handles and the pointer will change to the **resize** ↔ arrow. Click and hold the **left mouse button** and drag until you change the object to the desired size.

2. Moving an object is as simple as clicking once on the object, then positioning the pointer on the object so it changes to the **move** ✛ arrow. Click and hold the **left mouse button** and drag the object to its new location.
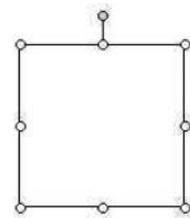
Wrapping style

Positioning pictures and graphics can be one of the most challenging layout concepts to master. Everyone has been in the situation where a graphic works and drops into position perfectly and also the reverse, where you just can't get one positioned correctly. If you understand how graphics and text wrapping work, it can make it much easier to position them effectively.

Wrapping refers to the way the picture and the text on the page interact. There are seven wrapping styles available as shown here.

Square

This style allows you to move the object around the page and the text will wrap around the object. You have the option to allow the text to wrap around either both sides, the left only, the right only or largest only. Largest only is the side of the graphic with the most space.

Tight

This style is similar to square. However, if the graphic is not square the text will wrap in against the edges of the graphic.

Through

Occasionally a graphic may have a gap in the picture. This situation can occur where a graphic has been created by using several drawing objects. This form of text wrapping will wrap tight around the picture, but text will also be placed in any of the gaps.

Top and bottom

Text will be placed above and below the object. No text will appear on the left or right sides.

Behind text

The object will be placed behind the text. The text will flow right over the top of the object. This is similar to a watermark effect.

In front of text

The object will be placed in front of the text. Using this option, you may not be able to read all of the text.

In line with text

The object will be placed in line with the text. You can select the object and move it like you would any section of text.

Example: image and text wrapping interactions

The following example shows the way the graphic and text interact using each different text wrapping style.
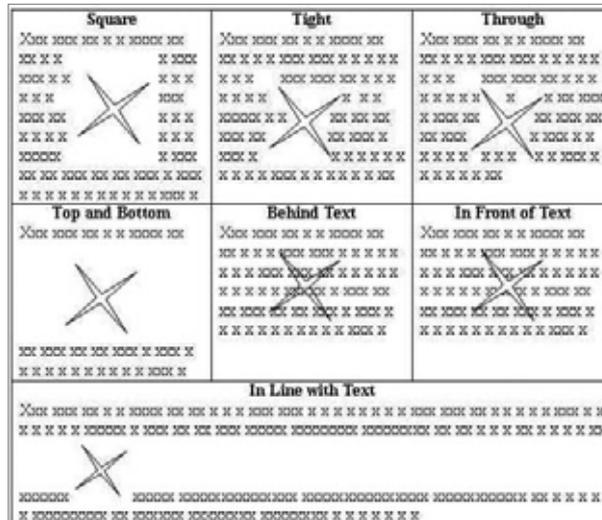
Adjust the text wrapping properties of a graphic

1. Click on your graphic and go to the **Ribbon**, then choose **Picture Tools**, **Format**.

2. Choose the ⬚ **Wrap Text** button and click on the style you want to apply.

3. Move the graphic into the desired position.
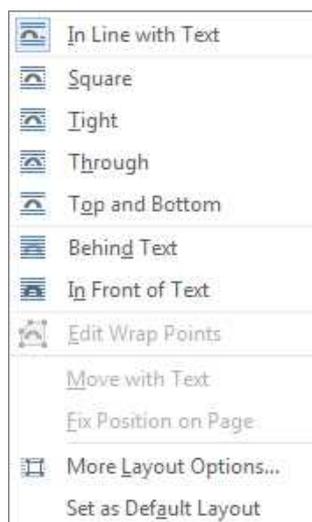
Move object with text

One of the most important settings for any picture is the option to 'Move object with text'. This setting ensures that if you add or remove text from the document, the image will be moved with the text that surrounds it.

1. Click on your graphic and go to the **Ribbon**, then choose **Picture Tools, Format**.

2. Choose **Position**.

3. Choose **More Layout Options**, choose **Position**.

4. Tick or untick **Move object with text**.

Tip: image nudging

Have you ever had trouble moving a picture just a little bit? Have you noticed how they tend to jump around? You can do what is called nudging (moving the image a little bit at a time) by holding down the Ctrl key and pressing an arrow key on the keyboard. The image will be moved just a little bit – perfect for fine-tuning.

Data from other software applications

Due to the variety of software programs available, there is a growing trend towards integrating the content generated in them. When the content of packages is able to be exchanged, the programs are referred to as compatible.
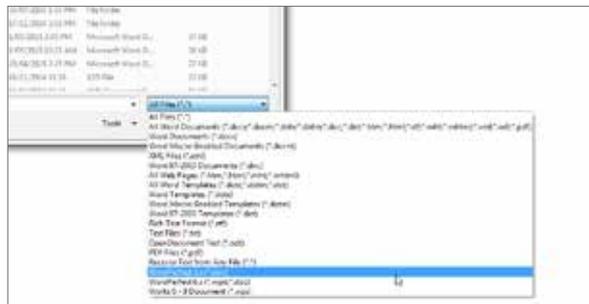
Many software packages now give users the option of opening a file that was created in a different software package. If you look at the options under 'Files of type' when opening a document in Word, you will see that the list includes WordPerfect and Works and even other versions of Word. This means that you can open files that were created using those packages.

You can also save a file in a format that is able to be opened in another software package. If you review the options available under 'Save as type' in Word, you will see that you can save documents in a format suitable for programs including Works. However, because of the differences between software packages, occasionally some formatting may be lost when this method is used.

Files

You can insert the contents of a text file or a file that you have created in Word into a document. The contents of the file you insert will keep its formatting. This technique can be useful when combining information from several sources, such as when you are collecting articles from various authors for a newsletter.

Insert a file into a document

1. Move the insertion point to the position in the document where you want to place the file.

2. From the **Ribbon**, choose the **Insert** tab, go to the **Text grouping**, click the drop-down ▼ arrow beside **Object** and click **Text from File**.

3. Choose the drive and folder and then the file you wish to insert.

4. Click **Insert**.

References

References in Word take the form of a hyperlink (text or graphic that you click on to take you to another location) either from one part of a document to another part or to an external file or website. Footnotes and endnotes are another form of references.

One of the best uses for references is in the table of contents of large documents, such as reports, which can be hundreds of pages long. A reference hyperlink is included in the table of contents so that when you press the **Ctrl** key on the keyboard and click on an item in the table of contents, the document will jump to that position.

Create a table of contents

1. Move to the position in the document where the table of contents will be positioned.

2. From the **Ribbon**, choose the **References** tab and select **Table of Contents**. Then choose one of the built-in options, or at the bottom of the menu you can choose **Custom Table of Contents.**

3. Choose any option.

4. To jump to a heading in the document, hold down the **Ctrl** key and click on the item in the table of contents.

Quotes

To add impact or weight to the contents of a document you may wish to use the thoughts or words of others. As well as the required referencing and footnotes, you may wish to add emphasis by indenting the quote, italicising or altering the font. You may find that your organisation's policies and procedures will provide you with direction on this.

Practice task 12

1. Open a new blank Word document.
   - Insert a Clip Art graphic by performing a search for 'Clip Art computers'.
   - Add a caption below the graphic that says 'Employee using new computer'. (You can add a caption by right clicking on the image and selecting Caption.)
   - Find and insert three other Clip Art or photographic items, which you have searched for, into the document. Add descriptive captions to each of the graphics. Type a line above each image stating what words you used in your search to find the Clip Art or photographs.
   - Save the file as 'Clip Art Practice'.
2. Open a blank Word document.
   - Access and download section-break-task.docx at: http://chilp.it/0cce1ea.
   - Access and download columns-task.docx at: http://chilp.it/9e74361.
   - Put the content of both files into the new blank Word document.
   - Take note of what happened to the information you inserted and write a brief description of any changes in formatting or layout of the information you inserted.
3. Open a document that contains a number of headings over several pages.
   - Insert a blank page at the start of the document and create a table of contents.
   - Practise moving to the various sections of the document using a Ctrl+click.

Summary

1. Create and manipulate the layout of a table.

2. Format and enhance the design of a table.

3. Insert and manipulate graphics into a document.

4. Use and manipulate drawing and graphic tools to clarify information.

5. Enter and import text to enhance your documents and import data from other software applications.

6. Use referencing effectively.

Learning checkpoint 3
Add tables and other data

This learning checkpoint allows you to review your skills and knowledge in adding tables and other data.

Part A

Produce a document similar to the following example. You will need to search for similar Clip Art images to use in the document. Your document should use the same layout (positioning of text and images), similar heading styles, tables and margins. Ensure you create appropriate styles to support the formatting of the document. Save the document as 'Capricorn newsleter.docx' and print it.

Part B

1. Create a document.

2. Access and download gym-roster.docx either by scanning the QR code provided or at: http://chilp.it/01ba147.

3. Design a flyer to hang on the noticeboard in the dressing rooms.

4. Find suitable graphics.

5. Key in and format the information. Save as 'Asp ch3 Table 1' and print the document.

6. Reformat the table to create a different emphasis. Print and save as: Asp ch3 Table 2.

7. Compare the two documents and write a report discussing the changes that you made, how you wanted to change the emphasis of the document, and if you achieved it.

Part C

1. Access and download shepherd-street-gym.docx by either scanning the QR code provided or at: http://chilp.it/fc51e82. You will find text that needs to be formatted into a flyer for a gym. This flyer will be mailed to every household in the area.

2. Create a flyer for this gym.

3. Find a quote from a newspaper, website or health magazine to add.

4. Find suitable Clip Art.

5. Find a photo that could be the gym and draw a map (it is at the corner of Baylis Street and Shepherd Street).

Part B

Topic 4
Produce text documents

In this topic we will review the importance of editing, printing and storing documents, and using software functions to ensure that documents are produced in the most time- and cost-effective manner.

The advanced functions explained in this topic will allow you to streamline your operations so that consistency of your finished documents can be assured.

In this topic you will learn how to:

4A   Use advanced software functions

4B   Enter, import and edit text and other data

4C   Preview, adjust and print documents

4D   Name and store text documents and exit the application safely

4E   Prepare text documents within designated time lines

4F   Overcome problems with document design and production

4A Use advanced software functions

Word-processing software programs contain hundreds of software tools to assist you in creating and editing documents. Knowing which functions to use for various text effects ensures you can create professional looking documents and complete your work efficiently.

Just like any trade, the more tools you have available the easier it is to get the job done. If you complete tasks using the correct formatting and functions, your colleagues will be able to easily edit and make changes to the documents you have created. For example, if you did not know how to use section breaks to change the number of columns on a page and you had incorrectly used two tables to create the same effect, the next person to use the document would have to reformat the contents correctly into two columns. A lot of valuable time would be wasted.

Advanced word-processing software functions:

- Sections
- Columns
- Templates
- Tables
- Alternate headers and footers
- Styles
- Importing data, objects and pictures
- Drawing and graphics tools
- Sort
- Mail merge

Sections

Sections are used to separate parts of the document with a different layout, such as margin size, page orientation or number of columns. They allow you to have control over the final look of your document. For example, if you want to produce a document that has one page in portrait orientation but the next page would be better in landscape, you would use a section break.

To achieve various effects, there are a range of section break types available, which are described here.

Next Page

A new page is started and the new section starts on this page. This option is useful for having more than one page orientation in a document. You can insert a Next Page section break, then change the page orientation on one of the pages from portrait to landscape or vice versa.

Continuous

A new section is inserted on the current page. This technique is used to create pages with more than one column format or with different margins on different parts of the page.

Even Page or Odd Page

A new page section is started on the next even or odd numbered page depending on which command you choose. Additional pages will be inserted into the document as required. This technique is used in books where each new chapter must start on either an odd or even page consistently throughout the document.

Insert a section break

1. Move to the position in the document where you would like the section break inserted.

2. From the **Ribbon**, choose the **Page Layout** tab, then pull down the **Breaks** button.

3. Select the type of break you would like from **Next Page**, **Continuous**, **Even Page** and **Odd Page** options.

4. Click **OK**. A section break will be inserted and will look similar to the following.

¶···Section Break (Next Page)···

¶···Section Break (Continuous)···
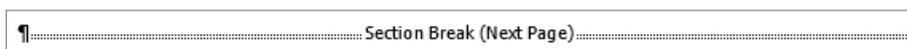
5. You can only see section breaks when the non-printing characters are on display. Click the **Show/Hide ¶** button to show them.

Example: section breaks

The following example illustrates how section breaks are used.

In this example, the first continuous section break is used to change from one column for the major heading, 'Capricorn State School', to two columns for the information underneath.

Continuous section breaks

The second continuous section break is used to change from two columns to one so that the larger article is presented in an easy-to-read layout.

Know which section you are in

To check which section you are currently in, look at the status bar at the bottom of the screen. The section number will be shown as 'Section' followed by the number; for example, Section 1, as shown here.

If you do not have the information above on your status bar – the bar right at the bottom of your Word screen and above the Windows Task Bar – point at it with the pointer, click your right mouse button and add in the features you would like to have on your status bar.

Remove a section break

1. Move the cursor so it is positioned before the section break.

2. Press the **Delete** key on the keyboard and the break will be removed.

Styles

As already explained, styles are used to maintain consistency in text formatting throughout a document. When combined with the use of functions such as section breaks and columns, it becomes very easy to create professional documents.

Columns

Columns have a variety of uses, particularly in designing forms, newsletters and brochures. You can use several formats and options when creating columns. You can divide your page or section into a number of even columns, or columns of different widths; change the spacing between columns; and choose whether or not to include a line between the columns.

Unless you have specified otherwise, new documents created in Word will automatically be formatted with one column.

Using columns is an important aspect of dealing with layout changes in Word. It gives the option of setting the exact parameters of how much of the document will be affected.

Change the number, width and spacing of columns

1. From the **Ribbon**, choose the **Page Layout** tab, go to the **Page Setup** grouping and click on the drop-down arrow under **Columns.**

2. Select one of the pre-set column options.

OR

>   Go to **More Columns** and enter the number of columns and **Width** and **Spacing** manually.

3. Select the appropriate option under **Apply to**. Choose **Whole document**, **This section** or **This point forward**.

4. Click **OK**.
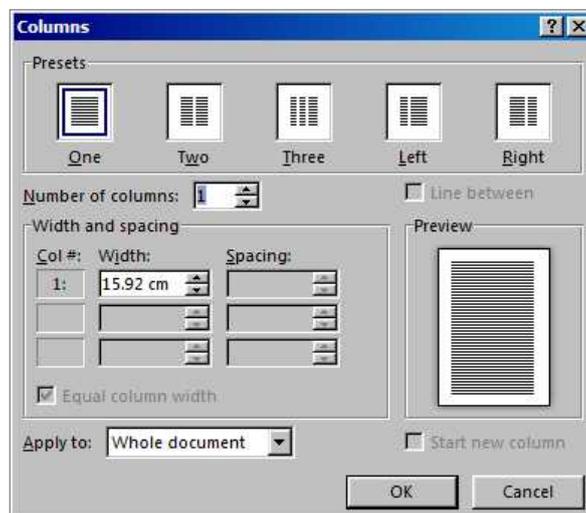
Practice task 13

Using a document that contains large blocks of text, make the following changes.

1. Change the page layout to have two even columns using the Columns button via Page Layout on the Ribbon.

2. Using the **Columns** button, experiment with the various column styles, including number and width of columns, line between, and left and right column options.

3. Return the document to its original one-column format. Then apply the functions and design skills you have learnt so far to create an attractive one-page newsletter. Ensure you adjust the margins and have at least two sections with different numbers of columns on the page.

4. Save your work.

4B   Enter, import and edit text and other data

Software packages enable users to integrate data from a range of sources. Microsoft Office allows the user to import and export data between the various packages. A common use of this function is to import data from an Excel spreadsheet into a Word document. Data can be imported as an object from one program to another, saving a lot of time.

Insert an object

1. From the **Ribbon**, choose the **Insert** tab, click **Object** in the Text grouping. Then choose **Object** from the pull-down menu.

2. Click the **Create from File** tab, click **Browse**.

3. Locate the drive and folder containing the data you wish to import, and doubleclick on the file name.

4. Click **OK**. The file will be placed into your document. Sometimes the object that is inserted will be too big so you may need to resize it and then edit it to ensure the correct data is displayed.

Edit imported data

To edit the object you have imported, double-click on it and you will be in editing mode. The tools you have available to edit an object will depend on the program that the object was created in. You will generally have a lot of the same functions you had when you created the object in the original program. In the next section we examine editing an object created using Excel.

Often Excel worksheets will contain a number of rows and columns of data. You may not want all the data to be shown in your Word document, so you may need to adjust the range of cells that are on display.

Double-click on the Excel object to enter editing mode. You will be presented with a 'mini' version of Excel complete with the various worksheets and scroll bars for moving through the data. Below you can see that we do not need the blank rows and columns to be displayed.

Hide column and rows

To hide any data that you do not want displayed (for example, blank rows or columns), use the cropping handles on the sides and corners to click and drag to adjust the size of the area displayed. Below the display area has been adjusted so that the blank rows and columns are now hidden. While in editing mode you can also change the data on your spreadsheet.
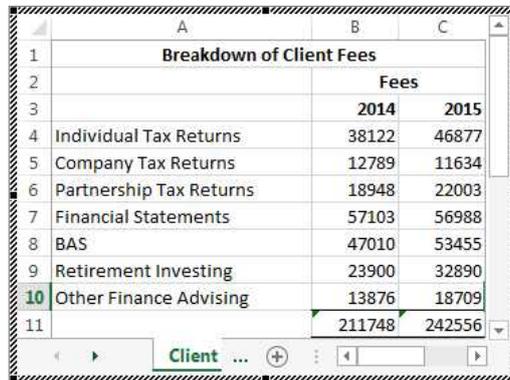
	A	B	C
1	Breakdown of Client Fees		
2		Fees	
3		2014	2015
4	Individual Tax Returns	38122	46877
5	Company Tax Returns	12789	11634
6	Partnership Tax Returns	18948	22003
7	Financial Statements	57103	56988
8	BAS	47010	53455
9	Retirement Investing	23900	32890
10	Other Finance Advising	13876	18709
11		211748	242556

When you have finished editing your object, simply double-click anywhere outside the object on your document and the object will once again appear like a graphic. You can now resize the object to meet your needs.

Templates

Templates are saved style guides that are used to create frequently produced documents. Most organisations have templates for letters, faxes, memos, minutes and agendas. They may also have templates for reports, flyers and brochures.

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

Check file location

1. From the **Ribbon**, choose the **File** tab, click **Options** on the left-hand side menu.

2. Choose **Trust Center**, **Trust Center Settings**, **Trusted Locations**, and you will see the filename and filepath of where your templates are stored.

3. You can manage your templates from this area.

Create a template

1. From the **Ribbon**, choose the **File** tab, click **New**.

2. Select **Blank document** from **FEATURED**.

3. Create and format the template that you require.

4. Click **File**, **Save As**, then choose **Browse**.

5. In the **Save as type** box, select **Word Template (*.dotx)**.

When you save the new template, it will be saved to the Trusted Location that you found earlier.

Tip: change and use a template

If you need to make changes to a template you have created, make sure that you are opening a template and not a document by changing the All Files setting in the Open window to Word Templates. If you look carefully you will also see that templates and documents have slightly different icons beside the file name.
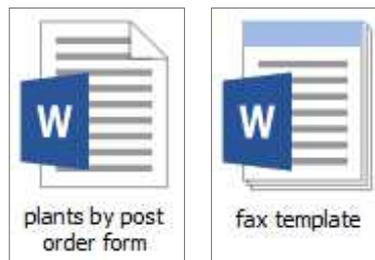
So that you don't accidentally make changes to your template, ensure you always remember to create a document based on the template when creating new files.

Create alternate headers and footers

Headers and footers are used to display information on each page of a document. When creating large documents, such as reports or booklets, you may be required to display different information in the headers and footers of odd and even pages. You will often find examples of alternate headers and footers in books.

1. Open your document.

2. From the **Ribbon**, choose the **Insert** tab, select the **Header or Footer** option to insert a header or footer from the **Header & Footer** grouping. The **Header & Footer Tools** will appear.

3. Choose **Different Odd & Even Pages** in the **Options** grouping.

4. You will now see that the header and footer names have changed to **Odd Page Header** and **Even Page Header** and appear similar to the following image.
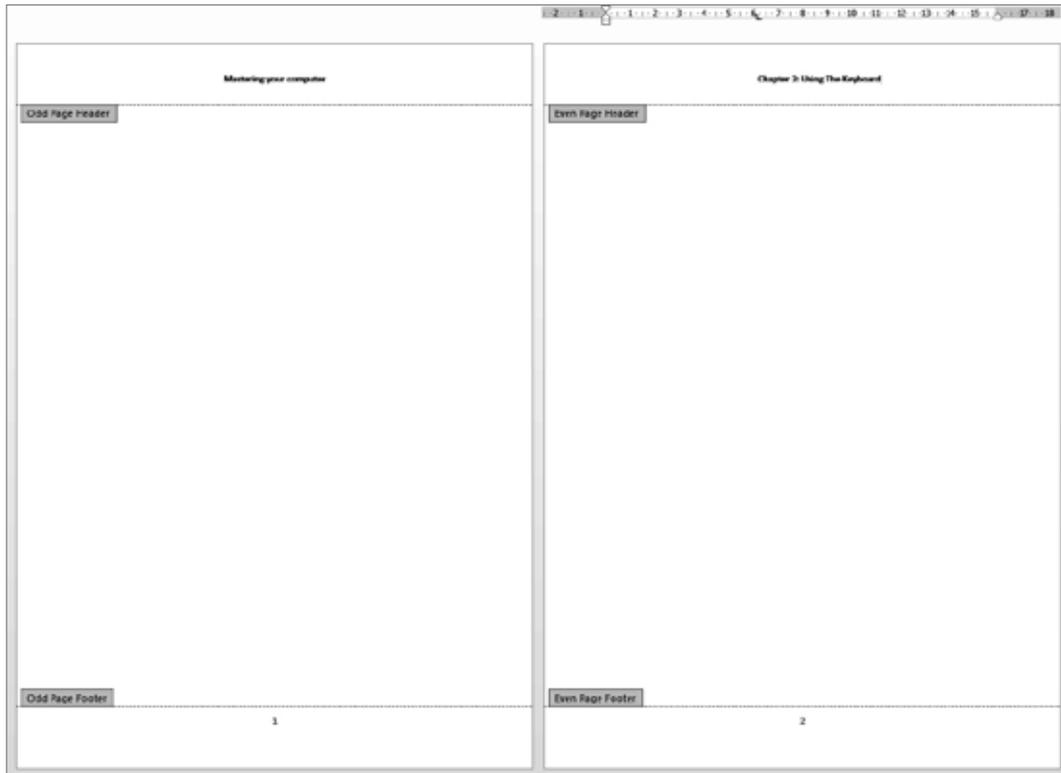
5. Enter the information required into the odd and even headers.

Different first page header and footer

Another option that is available when working with headers and footers is to have a different first page. This is useful when creating documents that have a title page where headers and footers would not be displayed.

Follow the previous instructions to open **Header & Footer Tools** tab, and click **Different First Page**.

Practice task 14

1. You work for Total Accounting Solutions and your supervisor has requested that you create new letter and fax templates. The following guidelines need to be followed when designing and creating the templates.

   - Organisation name, address, phone number, fax number and email address are to be included in the header.

   - Organisation details:

     Total Accounting Solutions

     PO Box 459

     CAULFIELD VIC 3185

     Phone: 03 9847 6651

     Fax: 03 9847 6612

     Email: info@totalaccounting.com.au

   - The company slogan is to be included in the footer of both documents.

   - Company slogan is: 'Helping you through accounting and financial advice'.

   - Left and right margins should be no more than 2 cm.

   - Top and bottom margins should be no more than 1.5 cm.
     When you have finished, save your templates as 'TAS Letter template' and 'TAS Fax template'.

2. Open a blank Word document and create alternate headers and footers. Save your document as 'Headers and Footers Practice'.

Create a mail merge

Mail merges allow you to combine the contents of two files, one that contains the information you are sending and one that contains the details of the recipients. Mail merges can be used for personalising letters, reports, faxes and flyers.

The easiest way to learn about mail merges is to work through the process of completing one.

Here is a summary of the steps to follow when creating a mail merge.

1. Go to **Mailings** in the **Ribbon**, click on the **Start mail merge** button and then select **Step-by-Step Mail Merge Wizard**.

2. Select the **Document Type**.

3. Select the starting document to use for the merge.

4. Select the recipients (data source).

5. Write your letter.

6. Preview your letter.

7. Complete the merge.

8. Save the document.

Practice task 15

Create the mail merge outlined below.

1. Open a new blank document in Word.

2. From the Ribbon, choose Mailings, click on Start Mail Merge then select Step-by-Step Mail Merge Wizard. The Mail Merge task pane will appear. At this point, the Mail Merge Wizard allows you to select the type of document you are working on. You can choose from letters, email messages, envelopes, labels and directory.

3. Select Letters from Select document type task panel. Click Next: Starting document. Now you need to set up your letters. Under Select starting document, there are three options:

   • Use the current document

   • Start from a template

   • Start from existing document

4. Select Use the current document. Then click Next: Select recipients. The recipients are the people who will receive the document.

   In the Select recipients panel, you are given three options:

   • Use an existing list – choose this if you already have a recipient list or data source available

   • Select from Outlook contacts – choose this if you have profiles set up in Outlook

   • Type a new list – choose this if you have not previously created a data source or recipient list

5. Select Type a new list. Then select Create from the Type a new list panel.

6. To create a recipient list, you need to set up or customise your columns. To do this, click Customize Columns. In the Customize Address List, you can add, delete or rename fields or columns by clicking Add, Delete or Rename. Then click OK.

... continued

Practice task 15

7. Create a recipient list with the following information. Remember to customise your address list first.

Company Name	Address	City	State	Post code	First name	Surname	Current
Henderson Printers	PO Box 522	MAROOCHYDORE	QLD	4558	Alex	Bolton	$10000
Ingles Accounting	28 Melville Street	NOOSA	QLD	4566	Susan	McFee	$4000
John Marcus & Sons	PO Box 193	BEERWAH	QLD	4519	John	Marcus	$8000

8. Type these details into the fields. When entering data, you can either click into each field using the mouse or use the Tab and Enter keys on the keyboard to jump from field to field. To create a new record, click New Entry after you have entered a record. When you have finished entering all the details, click OK. When you do this, you will be prompted to save the list. Choose an appropriate location for the list file. Choose an appropriate name for the recipient list. Click Save.

Word has a range of default locations for saved files. The default location for data sources is Libraries\Documents\My Data Sources. When you insert or save a data source, this is the location Word will automatically look in. If you have an existing recipient list, when you choose Use an Existing List from the Select recipients panel, the browse tool's default location is also Libraries\Documents\My Data Sources.
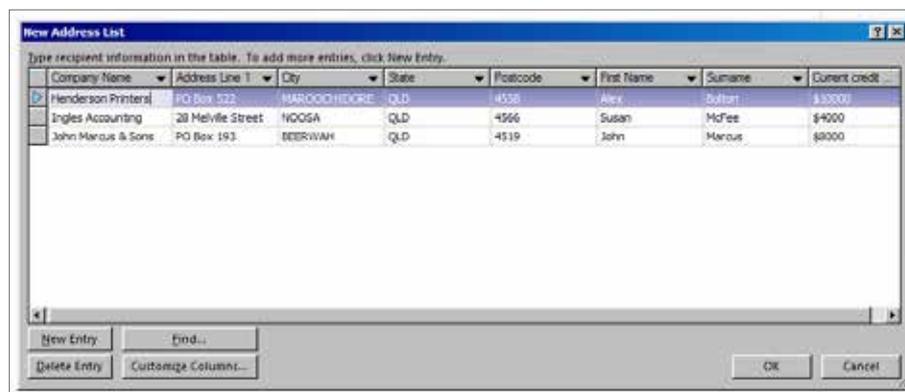
After you have saved your recipients list, when you open this file the information appears in the Mail Merge Recipients window. In this window, you can choose which entries to include in the mail merge by checking (ticking) or unchecking the box beside the first field. This option is useful because data sources or recipient lists often contain hundreds of records.

... continued

Practice task 15

9. Ensure all recipients are checked. Click OK. Then click Next: Write your letter.

10. Now type and format the following letter, include the defined merge fields. To do this, move the cursor to the position in the document where you want the field, then click the Insert Merge Field button from the Mailings toolbar. Select the field you want to insert. Repeat for each field.
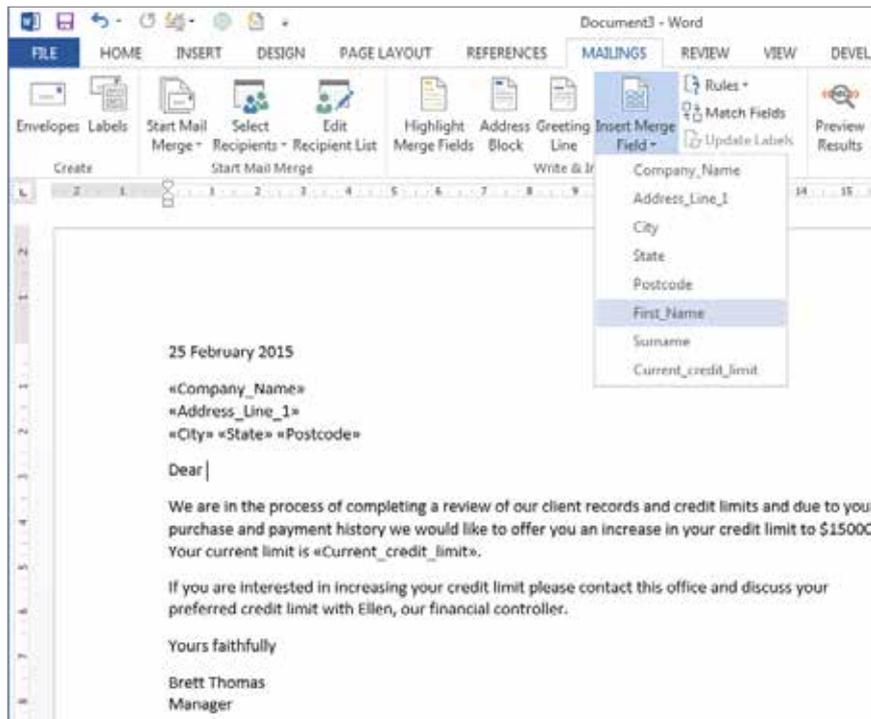
continued ...

… continued

Practice task 15

11. Click Next: Preview your letters. A Preview your letters panel will appear. Use the forward and backward arrows in the panel to preview each letter. When you click an arrow, the document on the left-hand side should be updated with the record.

12. Click Next: Complete the merge to complete the merge. There are two options provided to complete the merge: Print or Edit individual letters.

    Both options ask you which records you want to merge and you can select from All, Current Record or From/To. If you choose Print, you need to nominate which records you want to print before you send them to the printer. If you choose Edit individual letters, you will be asked which records you want to merge to a new document. The letters will be displayed on the screen so you can check them before printing. The letters are displayed together in a new document called Letters1.

13. Click Edit individual letters. Select All and click OK.

14. Review the letters. When you are sure they are correct, choose Print.

15. When saving the document, make sure you save the source document with the merge fields not the Letters1 document. This is important if you wish to use the same letter at some stage in the future. Select the File tab, choose Save As. Save the file to an appropriate place on your computer or network server.

Edit documents

One of the essential phases in producing any text document is editing. Having produced a draft of a document or accessed an existing document, the next step is to review and edit the document to ensure it meets organisational and task requirements. You need to check the style and layout of the document and you must also check the spelling, grammar and punctuation.

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

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

Document type

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

... continued

Audience, purpose and contents

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

Spelling

Never rely on the spellcheck function on your computer. It only identifies spelling errors, not incorrect use of words. Words may also be spelt in different ways; for example, American and Australian spelling for words such as organize/organise. Check the in-house style manual.

Grammar and punctuation

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

Style

Ensure you have used the correct template, if one is available. Have you followed the guidelines in the organisation's in-house style manual, including use of logos and fonts? Is the style consistent? Make sure headers and footers are correct and spacing is consistent throughout; for example, 10.30 am is always written in the same way (not 10:30 a.m. or 10.30am). Check the in-house style manual.

Numerical and statistical data is accurate

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

Edit and proofread tools and symbols

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

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

You need to be familiar with both common and non-standard editing symbols so that you can easily interpret the changes suggested by others. This table shows some common editing marks.

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

Tips: editing

Where possible, allow enough time to complete the draft of a document and then put it aside and work on another task before performing the final edit. Often when we work on a task for a long period of time we no longer read what is there; we read what we think should be there. It may only be a word or two or a figure that is different, but this can be crucial if it's the wrong word or figure.

Read the document out loud. This may sound strange but it is a great way to ensure that it reads correctly and that words have not been missed.

Example: not checking work thoroughly

Nancy is an administration assistant working for a supplies firm. She has just finished typing up the monthly sales report. She considers herself very efficient and has completed this task on a regular basis for the last six months. She sits down and proofreads the report, picking up a couple of formatting errors, but is confident it is ready to go. She puts a copy in the manager's tray and then proceeds to make 100 copies to distribute at the sales meeting.

Peter, another employee, comes over to the photocopier and picks up a copy of the report while waiting to do his own copying. He reads the first paragraph and sees that it mentions an increase of 50 per cent in new sales, when he is sure the manager's memo on the subject mentioned an increase of only 15 per cent.

After a quick glance at another section of the report he notices the name of a valued client, 'Mrs Paula Mart' has been mistyped and reads, 'Mrs Paula Nart'. Peter approaches Nancy regarding the errors and suggests that the report needs further proofreading. Nancy is shocked and says she will re-read the report right away and correct any errors.

Practice task 16

Work through the following task to practise importing and editing an Excel worksheet.

- Open a new blank Word document.
- Access and download client-fees.xlsx at: http://chilp.it/d68ee79.
- Import this Excel file.
- Edit the object by double-clicking on it.
- Resize the object so that it fits on the page.
- Change the Chart 1 sheet. Resize the object so that it uses the full width of the page.
- Edit the object so that the Client Fees sheet is showing.
- Resize the object so that the data takes up no more than half the width of the page.
- Practise switching between the sheets and resizing the object to change the data that is on display.
- Adjust your page so that it appears as follows. Save and print your work.

4C Preview, adjust and print documents

When creating a document, it is important to use print preview to see how it will look when printed. Print preview is particularly useful for checking the design of your document to ensure it adheres to the intended design principles. Using the onscreen print preview also helps to conserve resources by reducing printer ink/ toner and paper usage. When a document contains a lot of colour, which can be expensive to print, you can reduce printer ink usage significantly by only printing the final draft.

Your organisation may have guidelines for printing highly designed documents in order to keep costs down. These guidelines may include using print preview or changing the printer settings to draft or greyscale for draft versions of documents. Using these draft settings will reduce ink usage.

Use print preview

Print preview allows you to view a document as it will appear when printed. You can activate print preview by clicking the **File** tab and choosing **Print**. The print preview will be automatically shown in the right panel. You can use the zoom bar to zoom in or out on your page.
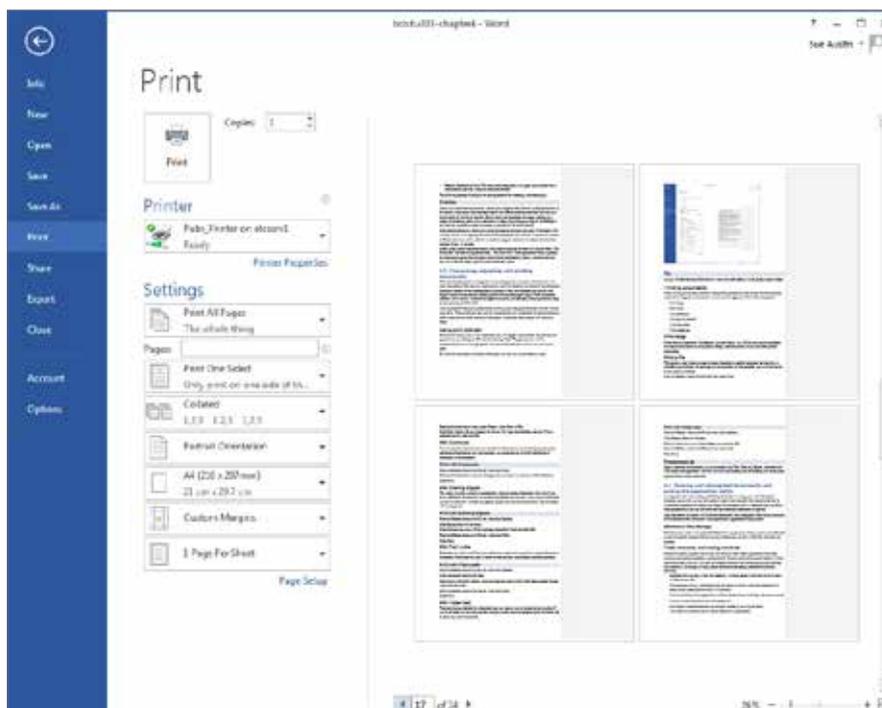
By using the zoom bar at the bottom of the page, you can view several pages at once.

As you will often be using print preview, it may be worth adding it to the Quick Access toolbar.

Print documents

There is a range of options available when printing documents. Most of the time, the document is printed as it appears on the screen, but you can also apply any of the following options:

- Print merge
- Print to file
- With comments
- With drawing objects
- With field codes
- With hidden text

Print merge

When merging documents; for example, in a mail merge, you will have the option to perform the merge to the screen or to the printer. Simply select the printer if you want them printed immediately.

Print to file

1. This option is used when you need to take a document to another computer that may have a different type of printer. No hard copy of the document will be produced, just a file that can be saved to disk or emailed.

2. From the **Ribbon**, choose the **File** tab, then select **Print**.

3. From the first drop-down menu under **Printer**, select **Print to File**.

4. Click **Print**. Select a Save in location for the new file, then select the **Save as type**. Type a name for the file, then click **OK**.

Print with comments

You can print the comments applied to a document – these may give the reader additional information on how the document was constructed or briefly clarify information in the document.

1. From the **Ribbon**, choose the **File** tab, then select **Print**.

2. From the first drop-down menu in **Settings** make sure there is a tick next to **Print Markup**.

3. Click **Print**.

Print with drawing objects

This setting is usually turned on automatically when you create a document. However, if you have a document that contains a lot of drawing objects that you don't want to print in the drafts, you can de-select the 'with drawing objects' option using the instructions below and the objects will not be printed.

1. From the **Ribbon**, choose the **File** tab, then select **Options**.

2. Click **Display** from the left menu.

3. Click the check box next to **Print drawings created in Word** and click **OK**.

4. From the **Ribbon**, choose the **File** tab, then select **Print**.

5. Click **Print**.

Print with field codes

Field codes are used to tell Word what information needs to be inserted into a particular place in a document. Field codes are used to insert the merged data when creating merged documents.

1. From the **Ribbon**, choose the **File** tab, then select **Options**.

2. Click **Advanced** from the left menu.

3. Scroll down to the **Print** section. Click the check box next to **Print field codes instead of their values** and click **OK**.

4. From the **Ribbon**, choose the **File** tab, then select **Print**.

5. Click **Print**.

Print with hidden text

Text may be included in a document that you want to view on screen but not to print. If you have hidden the text using the font settings, you can make the computer print the hidden text by following these instructions.

1. From the **Ribbon**, choose the **File** tab, then select **Options**.

2. Click **Display** from the left menu.

3. Click the check box next to **Print hidden text** and click **OK**.

4. From the **Ribbon**, choose the **File** tab, then select **Print**.

5. Click **Print**.

Practice task 17

Open a document or documents you have created using text, drawing objects, comments and field codes, and experiment with print previews and selecting and de-selecting the various print options that have been discussed.

4D Name and store text documents and exit the application safely

An important task when creating and editing documents is saving your work. Saving the document ensures that you can edit or print it again when required. Each organisation has its own policies regarding the naming and storing of

documents and it is important you follow these procedures so that you and other staff can access the documents as required.

Most documents you create will be stored electronically and occasionally hard copies (printouts) of the documents may be stored in the organisation's paper-based filing system.

Electronic file storage

Each document needs to be easily identifiable. Your organisation is likely to have an established system for naming electronic files to ensure all employees are able to find files when they are required.

Folders are used to organise files so they are easier to locate. Each organisation uses folder structures and naming standards to ensure that all files are stored in the correct location. If your organisation has a network, you may have shared directories and folders that several staff may have access to.

The advantages of using shared directories and naming standards include the following.

Advantages of shared directories and naming standards

Organised files are easy to find. For example, it is much easier to find one file in 20 than it is to find one in 100.

If an employee is away, other employees can check to see how much of a document the employee has completed and finish it if necessary.

Work is less likely to be duplicated as staff can check if there is already a document created.

It is easy to share documents between employees.

Files stored in shared directories are normally backed up on a regular basis.

Virus scans are normally run on shared folders on a regular basis.

To set up a shared directory, you have to find the shared network drive. Then go to the folder level. This is the first place to organise the directory.

Folders have a treelike structure that branches from a parent directory to sub-folders in a hierarchical structure.

Example: hierarchical directory

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

```
SERVER (C Drive)
    ├── Group A
    ├── Group B
    └── Group C
            ├── Procedures
            ├── Personnel
            └── Projects
                    ├── Project A
                    ├── Project B
                    └── Project C
                            ├── ProjectC_timelines.docx
                            └── ProjectC_research1.docx
```
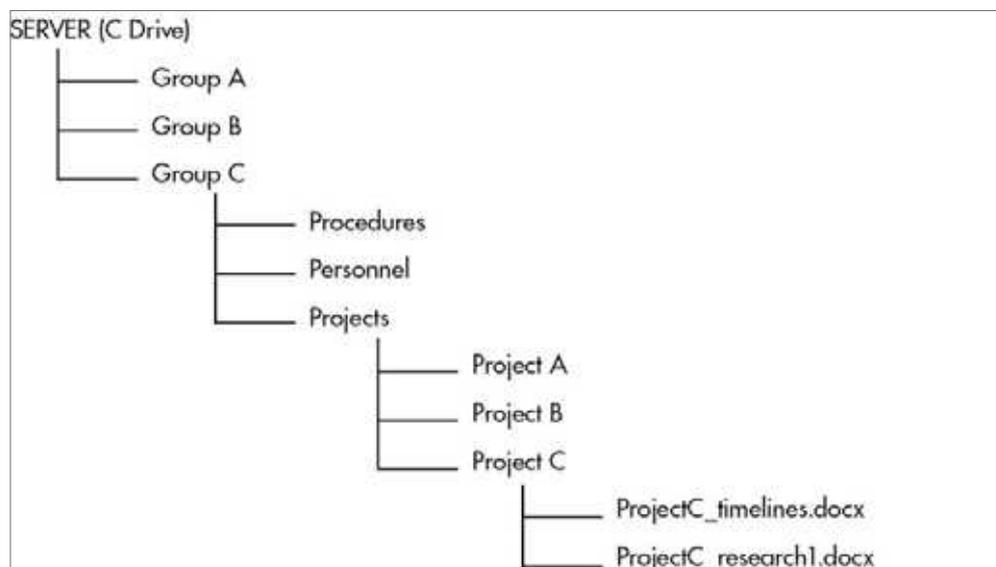
Practice task 18

Look at the previous example. Imagine that you belong to Group C.

1. You want to add another time line document for Project A to your shared directory. Write out the file path you would use to place it in the correct location. Decide on an appropriate name for the document.

2. Describe four advantages of using a shared directory.

Manage shared directories

When you have access to a shared directory to store your files, you may also have access to files created by other employees. It is important that you check your files and delete any that are no longer required on a regular basis to ensure the system remains efficient. If you are planning to have a clean-up of your files, check with your supervisor, before you delete any, which projects or clients you need to keep files for. You should never delete or move files created by another employee without their permission, always check first.

Organisations usually perform regular backups of shared directories and folders. In larger organisations a staff member from the IT department will usually be responsible for this. If you are planning to delete a lot of files, it may be a good idea to perform a backup of the files (which can be kept before deleting them).

Hard-copy storage

Many documents stored digitally are also stored in hard copy. This is a safeguard against a catastrophic computer system failure. Hard-copy storage requires space. It also requires a filing system that uses consistent, simple and meaningful names similar to those used in digital storage.

Managing hard-copy documents is necessary to efficiently use storage space. Retention schedules are used to determine which documents need to be kept and for how long. Documents without permanent value may be scheduled for eventual destruction. It is normal office practice for staff to perform archiving duties; that is, removing inactive files and placing them in long-term storage when there is not much other work to do. Retention schedules save space because only a limited number of records have long-term value. The development and implementation of a retention schedule also saves money, as it means that only records of enduring value will be permanently retained. Some documents need to be retained for legal reasons; for example, taxation details need to be retained for at least six years.

Example: retention schedule

Following is an example of a retention schedule.

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

Practice task 19

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

Case study

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

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

2. Craig was responsible for two areas. What folder names could he have used to make sure that files could be easily located?

3. Explain why folder and file names should be consistent, simple and meaningful.

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

Apply security to documents

It is vital that passwords are used to ensure that only authorised users are able to access files. Access to an organisation's data can be controlled at a number of levels, including drives and files. Employees can be given access to shared drives and directories or individual files.

Network/operating system logons

Most organisations have networks made up of more than one computer. Before employees can use a computer that is connected to the network they must be issued a logon username and password, which identifies them and allows them to access the files on the network.

Below are some guidelines for selecting a password and for protecting your work.

Select a good password

You should change your password on a regular basis and ensure you do not tell anyone what it is. Your password should also not be anything that can be easily guessed by other people, such as your date of birth, name, family members' names etc. Good passwords contain a mixture of letters and numbers and are at least six to eight characters long. Do not write your password down or keep it near your computer.

Protect individual files

Depending on the network configuration, employees will have their own drive for their files along with access to various shared employee drives. Where information contained in files is sensitive and not to be viewed by all employees, you can apply a password to an individual file. Two levels of access can be applied:

- A password to open the file, which allows the file to be viewed or printed
- A password to modify the file, which will let the user make changes to the file

You can let any other person who needs to access the file know the password.

Apply a password to a Word file

1. Create the document.

2. From the **Ribbon**, choose the **File** tab.

3. Click **Protect Document**, and choose **Restrict Editing**.

4. The **Restrict Editing** sidebar will appear. Select how you wish to apply restrictions, then click **Yes, Start Enforcing Protection**.

5. A pop-up box will appear where you enter and re-enter a password.

6. Click **Save**.
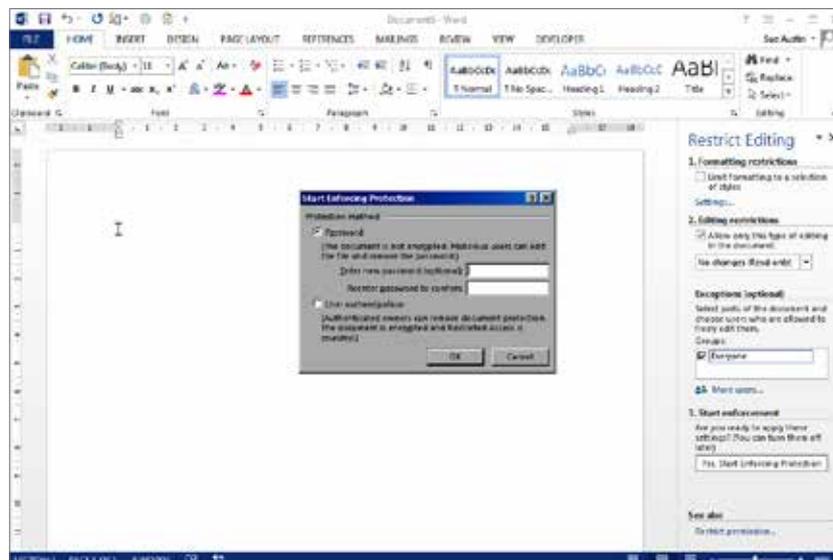
Exit applications

After creating or modifying an electronic document you need to exit the software application without causing damage or loss to the data. Data loss can occur when a computer program stops performing its expected function. Often the program may simply appear to freeze. All computer users have experienced data loss at some time, or have been unable to access data from a previously functioning computer. Data may have been accidentally erased or corrupted and made inaccessible. There are precautions you can take to prevent data loss. The main cause of data loss is human error.

Here are some other considerations to prevent data loss.

Exiting application

When finishing work on a document you need to exit the application. This maintains security and frees up computer resources, such as memory, for other applications.

Multiple files

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

Unattended workstation

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

Software

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

Hardware

If your computer starts to make unusual noises or display warning messages, shut it down immediately and do not power up again until you have received advice from the IT coordinator.

Practice task 20

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

Case study

Leigh works as an office administrator for a large organisation. Her daily tasks include modifying documents in a variety of software applications. One day she had to modify three documents in three different applications.

Leigh opened all three files before starting work. While working on one document she went on a coffee break but left all three applications open. When Leigh returned she found that her computer was slower than usual and then it started to make unusual noises. She banged on a few keys and then on the computer. Leigh's monitor then went blank.

1. Describe the mistakes Leigh made when modifying her documents.

2. Explain what work practices Leigh could have used to prevent computer failure.

4E Prepare text documents within designated time lines

When you are assigned a task in the workplace it is important that you clarify when it needs to be completed. Tasks that involve the design and creation of text documents are no exception and it is vital that you confirm the due date to ensure you can create a time line for production.

A time line sets the schedule for a task or project. It gives details of each task that needs to be accomplished to achieve that goal and also describes who will complete each task and how long they have to do this.

Factors that can influence the time line for developing a document

- Waiting to receive information from several team members to be collated into the one document
- When the information is date related
- Ensuring that resources, staff and equipment needed to produce a document are available and are not in use by another department

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Time lines

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

Tasks may include:

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

Practice task 21

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

Case study

Karen works as an administrative assistant. She has been asked to produce the organisation's newsletter. This is usually delivered in hard copy to internal and external clients.

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

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

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

1. Explain why the newsletter needed a time line.

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

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

4F | Overcome problems with document design and production

You will often experience difficulties when designing or producing documents. The hardware you are using might fail or the software might crash. Whatever the problem, it helps to have a plan for dealing with the unexpected. Organisations deal with difficulties in a number of different ways; some might have manuals or training notes, others might have a help desk set up to aid employees.

You can ask for help at any time by pressing the F1 function key or clicking **?** on the right-hand side of the ribbons.

Read manuals

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

Manuals can come in a paper-based or online format.

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

You may find the following websites useful.

- The Microsoft main site at: www.support.microsoft.com can 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.
- The Microsoft Office site at: www.office.microsoft.com provides resources for all Office applications. It has news, announcements and useful files for you to download. You can open this site by choosing Help, Office on the Web in all Office applications.

Read training notes

There are many ways to learn about computer functions and software packages. For example, you can go on a training course to learn about particular computer functions. Most suppliers also provide instructions on how to use their equipment.

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

Interpret error messages

Many word-processing software users struggle when faced with an error message that includes jargon they do not understand. It is important to write down any error message you are presented with so that you can seek further help. It is also important to write down what you were doing when the error message appeared.

Here is a commonly encountered error message. This error is often encountered when you have created a document with the paper size set to Letter and then attempt to change the paper size to A4 before printing.

If you read the error carefully you can identify the settings you need to check in order to fix the problem: perhaps it is the margins, the column spacing or paragraph indents. By checking each of the settings and adjusting them as required you should be able to fix the problem.

If you are unable to understand a message, you could search the internet for help. You can search on the Microsoft Office support sites or you can perform a general search using a search engine.

Tips: software help

Other sources of help for solving problems with word-processing software include:

- accessing paper-based manuals and training booklets in your workplace
- finding websites that offer advice on software use
- asking colleagues for help and advice
- participating in training courses in your area.

Practice task 22

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

Case study

Damir is a personal assistant to the manager of a large organisation. One of his duties is to produce business documents using a variety of software applications. While producing documents Damir often needs to use the Help function to answer questions about software functionality.

Sometimes Damir experiences software function problems that cannot be solved using the Help function and so he uses the Microsoft's support website to find solutions. There is a paper-based manual available in his workplace and he has copied the pages that he needs most frequently, keeping them in a Help folder on his desk.

1. Damir sometimes has a software functionality problem. Where does he go for help?

2. Damir is sometimes puzzled by something on the screen. What does he do?

3. Describe how Damir can use the paper-based manual.

4. Do you ever experience software problems while producing a document? Describe the steps you usually take to solve the problem.

Summary

1. Use advanced software functions to produce documents efficiently.

2. Enter and import text to enhance your documents.

3. Editing ensures that the document is grammatically correct, has an effective design and meets organisational requirements.

4. A checklist is often used to help people systematically go through all the points that need to be considered when editing a document.

5. A range of print options are available when printing a document.

6. Most organisations have folder structures and naming standards. This allows users to set up folders quickly and easily.

7. Naming methods need to be kept consistent, simple and meaningful.

8. Hard-copy documents need to be kept and archived, or destroyed after the appropriate period of time.

9. Make sure you exit applications without causing damage or data loss.

10. A time line sets the schedule for a task or project. It gives details of each task that needs to be accomplished to achieve that goal.

11. Time lines are often set by other people in your organisation. To successfully meet these requirements you need to define the scope of the document.

12. Use online and paper-based manuals and other training materials to overcome problems with document design and production.

Learning checkpoint 4
Produce text documents

This learning checkpoint allows you to review your skills and knowledge in producing text documents.

Part A

You work for Plant Paradise. The business does not currently have any templates and you have been given the following tasks to complete. The company details are as follows:

Plant Paradise, 124 Sunhill Street, BUDERIM QLD 4556
Ph: 07 5423 9912, Fax: 07 5423 9916
Email: inquiries@plantparadise.com.au
Web: www.plantparadise.com.au

1. Design a fax template.

   • Use a suitable Clip Art graphic as part of the fax header.

   • Ensure the paper size is A4 and set the top and bottom margins to 1 cm and the left and right margins to 2 cm.

   • Save the template as 'PP Fax Template'.

2. Create the following two-page merged document. Print the results of your merge and save the document used to create the merge as 'Faxed flyer'.

   Page 1

   • Using a document based on the fax template you just developed create the following fax.

   Dear <First Name>,

   We are pleased to send you our Summer Specials flyer. We have a number of new products available this summer and have featured some of them on the flyer.

   Be sure to purchase your seed early so you can ensure your plants are established before the summer heat arrives.

   This month all orders over $70 receive a free packet of Grow Now organic plant booster.

   If you do not wish to receive these faxes in future, please contact this office on 07 5423 9912 to be removed from the mailing list.

   Please do not hesitate to give our friendly team a call if you need any further information.

   Happy gardening!

   The Plant Paradise team

Recipient data:

First name	Surname	Fax number
Wafah	Dafour	07 5423 0987
Jacob	Shelby	07 3645 0978
Vladimir	Klimovitch	07 4164 5632
Ryan	Wheelan	07 5419 0088
Charlotte	Johnson	07 4162 3277

Page 2

- On the second page of the same document create a flyer containing the specials information shown below.

- Ensure you create a professional design that adheres to design principles outlined in Topic 2.

3. Insert the pictures of the fruits and vegetables into the flyer from plant-paradise-images.docx. Access and download this by either scanning the QR code provided or at: http://chilp.it/6b8c562.

- The flyer should be on A4 paper, have a border and the margins should be 1 cm on all sides. Do not change the margins on the fax cover sheet.

- Ensure you include the company name, phone number and website address on the flyer.

Summer Specials

Sweet corn

Sweet corn fresh from the garden is one of summer's great treats. Sweet corn should be planted in blocks of several rows close together for best pollination. Single-row plantings can result in poor kernel set. Pick and use immediately for maximum sweetness.

Pumpkin

These summer favourites come in a huge range of varieties. They are easy to grow, and love heat and regular water. Varieties available include Butternut, Jarradale, Ken Special and Queensland Blue. For best results plant on small mounds in groups of three.

Elderberry (new)

This easy-to-grow clumping tree has attractive white flowers followed by dark purple berries. Harvest the berries to make a tangy jam. Berries can also be used to produce either sparkling or still wine.

Purple runner beans (new)

These large, hardy beans will thrive during the heat of summer. They benefit from regular deep watering. Keep well-mulched for best results.

Passionfruit

The bright-green leaves and pretty flowers make passionfruit a perfect choice for covering a fence. Fertilise and water regularly. Fruit can be harvested when it falls from the vine when touched gently.

Rosella

Remember grandma's rosella jam? Surprisingly easy to grow, rosellas add a fantastic splash of colour to the garden with their dark green leaves and bright red pods. Great disease resistance. Water occasionally and pick frequently for best results.

Part B

Read the case study, then complete the task that follows.

Case study

You work for Johnson's Motors, a car dealership that sells and services Toyota and Suzuki vehicles. A new computer system has just been installed and you have been asked to create a directory structure that will meet their needs. It is important that they keep the information for Toyotas and Suzukis separate. They need to store the following information for each make of vehicle:

- Sales
- Servicing
- Marketing

They also need to store electronic files on employees, advertised positions and accounting data.

Design a folder structure to suit Johnson's Motors. Make sure you choose names that are consistent, simple and meaningful.

Part C

Shown below is an edited document. Access and download laser-printer-purchase. docx by either scanning the QR code or at: http://chilp.it/6e9bd54. Make the changes below. Save the document as 'Edited report' and print a copy.

Part D

Using the methods discussed in this topic, find help on the following Word issues. Print the information you find or write down the instructions to hand in to your trainer.

- Printing a list of AutoCorrect entries that have been created

- Bottom border on page won't print

- Change the language from English (US) to English (Australian)

Part E

Create a business document such as a report, flyer or newsletter. The topic is up to you, but you must discuss it with your trainer before you start.

If you are a workplace learner, you may use documents from your business. You will need to speak with your supervisor to decide on a suitable document.

1. Record the following information.

    -   The purpose and audience of the document

    -   The tasks that need to be completed to produce the document

    -   The time line for the document's production, showing the amount of time required for each task

2. Create the document.

    -   Print a draft of the document and edit it. (Submit the draft showing your editing with the final document.)

    -   Make the amendments to the document.

    -   Save the document with a suitable name.

    -   Print the final document.

3. Describe any difficulties you experienced when producing the document and explain how they were overcome.