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## Business equipment

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

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

### Printers

A printer is a device that produces a paper copy of the information displayed on the monitor of your computer. There are many different printers available. The main differences are the speed at which material is printed, the quality of the print, the options available and the cost.

Your organisation may have several different printers and you will have to make a decision about which one is most appropriate for your use. For example, does your document need to be printed in colour, or black and white? Do you need to print on one side or both sides of the paper?

Printing usually involves a number of decisions. Before you press the 'print' button, you need to consider the specific requirements of your task, the software application you are using and the capabilities of your printer. You may have various options for printing. For example, in Microsoft Project you can choose to print a project overview, a summary of tasks or just the milestone tasks. If you are printing a spreadsheet, you may wish to print it at actual size, or scale it down to fit on one page.

### Scanners

A scanner is a device that produces a digital version of a hard-copy document. For example, if you scan the hard-copy version of a report into a computer, you can send the information electronically or make alterations before reprinting.

A scanner can be a useful piece of equipment if you are producing a newsletter, catalogue or any other document containing photographs, illustrations, maps or handwritten material. It can copy a selected image into a graphic file on a computer. This can then be imported into the document you are working on. The image can be re-sized, if you need to make it smaller, or cropped if you only want to keep part of the image.

There are two primary types of scanner:

- a flat-bed scanner that is connected to your computer but stands alone
- a scanner that is incorporated into a fax machine and/or photocopier.

A flat-bed scanner can scan most images as it caters for many different sizes, from a photograph to a map. The other type of scanner is not as flexible and is most suited to single-sheet documents up to A4 size.

### Photocopiers

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

## 1B

## Select layout and style of publication

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

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

## Layout and styles

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

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



### Structure

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



### Format

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

# 1C

## Ensure consistency of design with company and/or client requirements

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

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

### Headings

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

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

### Lists

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

### Borders and lines

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

### Spacing

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

### Punctuation and capitalisation

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

## Example: report design

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

<p style="text-align: center;"><b>Report on paper usage</b></p> <p style="text-align: center;"><b>Overview</b></p> <p>Paper usage has reached an all-time high with twice as much paper being ordered per month as was ordered last year. This report outlines strategies to reduce paper wastage.</p> <p><b>Main points</b></p> <ul style="list-style-type: none"><li>• All printers purchased to have double-sided printing capacity.</li><li>• All printing to be tracked by the printer and each department made aware of its monthly paper usage.</li><li>• Budget for paper consumption to be reduced.</li><li>• Staff to communicate using emails rather than written memos.</li></ul> <p><b>Summary</b></p> <p>It is hoped that these changes will bring about a 25 per cent reduction in paper usage. Up-to-date figures and costs for paper consumption will be released in one month.</p>	<p>Report on paper usage</p> <p>Overview</p> <p>Paper usage has reached an all-time high with twice as much paper being ordered per month as was ordered last year. This report outlines strategies to reduce paper wastage.</p> <p>Main points</p> <p>All printers purchased to have double-sided printing capacity.</p> <p>All printing to be tracked by the printer and each department made aware of its monthly paper usage.</p> <p>Budget for paper consumption to be reduced.</p> <p>Staff to communicate using emails rather than written memos.</p> <p>Summary</p> <p>It is hoped that these changes will bring about a 25% per cent reduction in paper usage. Up-to-date figures and costs for paper consumption will be released in one month.</p>
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## 2B

## Design the document to maximise the presentation of information

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

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

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

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



### Enter information efficiently

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

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

### Allow a realistic amount of time

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

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

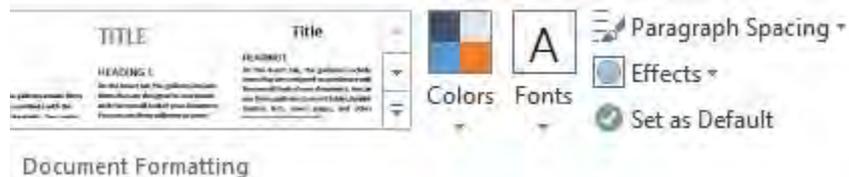
If adequate time is not allowed, then:

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

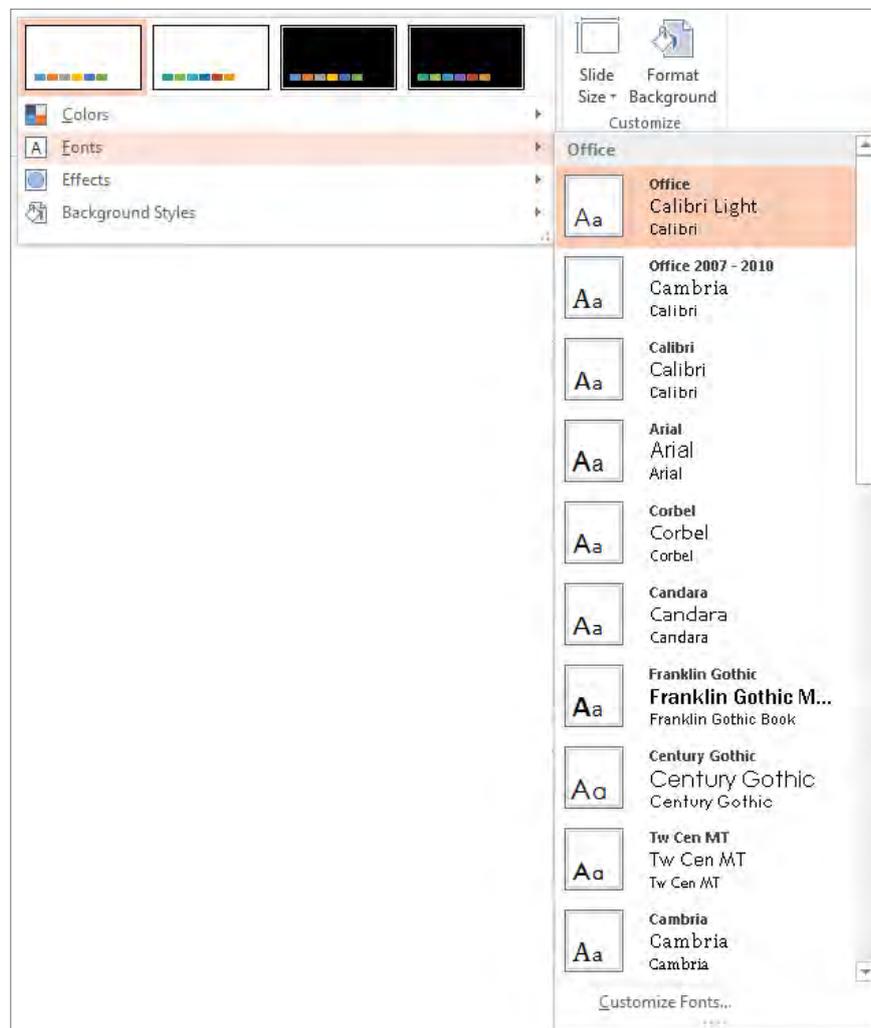
## Customise the theme fonts

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

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



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



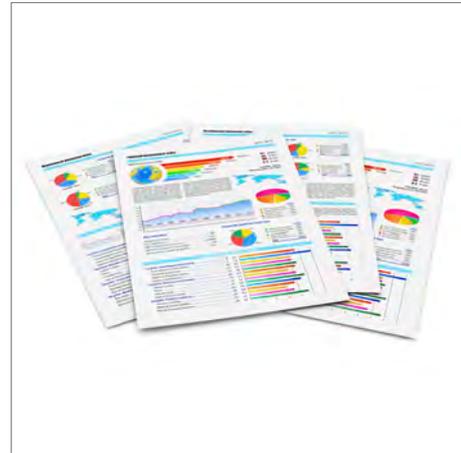
3. In the **Heading font** and **Body font** boxes, select the fonts you want to use. The sample is updated with the fonts that you select.
4. In the **Name** box, type an appropriate name for the new theme fonts.
5. Click **Save**.

# 2C

## Use a range of functions to design the document

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

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



### Format text

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

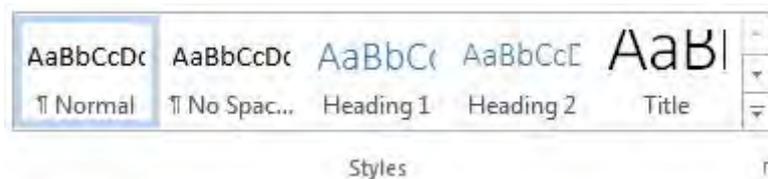
Before going any further you need to find, or create, a Word document you can work on. Make sure it has at least eight paragraphs and is at least three pages long. It can be on any topic. It might even be an existing document from your workplace. You will use this document to complete some of the tasks.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

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

## Change existing styles

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

1. Format the selected text with the new attributes that you want.  
For example, you might decide that you want to change the size for the Heading A style from 16 pt to 14 pt.
2. On the **Home** tab, in the **Styles** group, right-click the style that you want to change; for example, Normal.



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

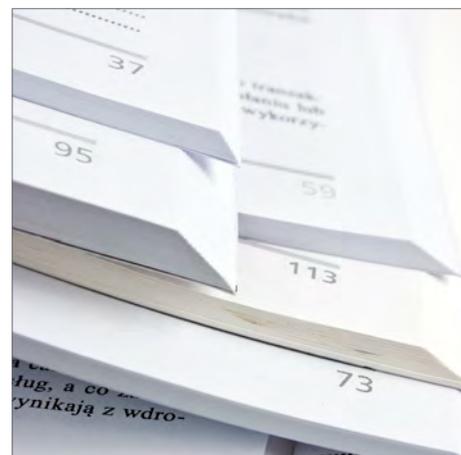
If you changed the styles in a document and the styles are not updating the way you expected, click the **Styles** dialogue box launcher, and then click the **Style Inspector** button  to find out whether text was manually formatted instead of formatted by using styles.

## Headers and footers

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

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

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



## Resize columns and rows

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

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

### Using the mouse option

1. Move your mouse onto the right edge of a column or the bottom of a row you want to resize. Your cursor will change into a two-headed arrow.
2. Click and drag the column or row to the required width or height.

### Using the menu option

1. Select a column to resize.
2. Select the **Layout** tab under **Table Tools**. Click on **Properties**.
3. Select the **Column** tab. Enter the column width into the **Preferred width** box. You may have to experiment with the correct size by looking at how the width change has altered your column.
4. Click on the **Previous Column** or **Next Column** buttons to change the width of adjacent columns.
5. Select a row and repeat these actions to modify its size.

## Example: resize columns and rows

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

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

## Merge and compare documents, and track changes

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

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

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

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

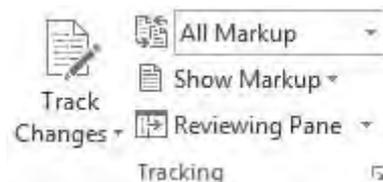


### Track changes

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

Follow these steps:

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



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

## Practice task 7

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

## Summary

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

### Accuracy of numerical and statistical data

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

## Edit and proofread tools and symbols

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

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

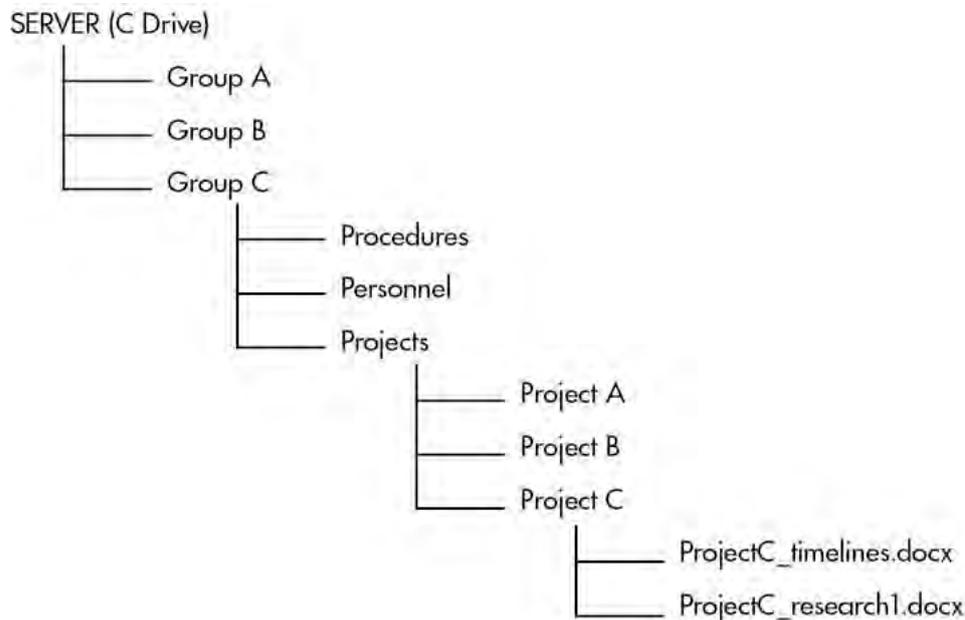
The *Style manual for authors, editors and printers* (John Wiley & Sons) is the standard text used by the Australian Government. It provides an extensive discussion of editing and proofreading symbols and their use, as well as other editing and formatting issues. Some organisations also have their own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

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

Instruction	Mark in the text	Symbol
Insert	Place a 'caret' in the text where you want to insert something: Insert $\lambda$ here	
Insert space	Place the mark where you want the space to be: Maintain accurate records of all transactions	
Insert hyphen	Place the mark where you want the hyphen to be: Don't throw away once used paper.	
Close up—delete space between characters	Draw half circles to link the characters: sen <sup>o</sup> ence	
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: <del>The meeting is scheduled for</del>	
Wrong font—replace by letter of correct font	Circle the character to be altered: Cooperation <sup>is</sup> very important	
Change to capital letters	Draw three lines under the characters to be altered: The appointment is for <u>mrs</u> <u>goberts</u> .	
Change to lower case	Draw a line through the characters to be altered: Take regular <del>breaks</del> from your work.	
Spell out abbreviation in full	Circle the abbreviation: It is a good <sup>ed</sup> of best practice.	
Transpose	Draw a line to where the letters or words should be: Put paper here that is used <sup>only on</sup> one side.	

## Example: directory hierarchy

Consider this example of a directory hierarchy.



In this structure the server has three folders for three separate workgroups: Group A, Group B and Group C. Group C has three major folders: Procedures, Personnel and Projects. The Projects Folder has three folders: Project A, Project B and Project C. The Project C folder has two documents: ProjectC\_timelines.docx and ProjectC\_research1.docx. The file path for retrieving a document starts at the server and ends when the correct document is located. For example, to reach the ProjectC\_timelines.doc the file path is: C:\GroupC\Projects\ProjectC\ProjectC\_timelines.docx.

## Digital storage

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

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



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## Topic 4

# Finalise the document

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

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

In this topic you will learn how to:

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

## 4B Make modifications

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

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

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

### Types of modifications

- Spelling and grammar
- Style
- Layout
- Theme
- Graphics
- Table layout
- Table formatting
- Headers and footers

## Edit a scanned document

Scan your document according to the instructions for your scanner.

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

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

Be aware that scanning a document does not always give a perfect result. Watch for documents that use unusual typefaces (fonts), as well as for confusion between similar looking letters and numbers.

The upper-case letter O and the numeral 0 can be confused, as can the number 1, lower-case l and even upper-case I.



## Make modifications in Microsoft Excel

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

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

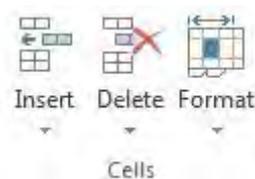
1. To place the contents of a cell in editing mode, click the cell that contains the data that you want to edit, and then click anywhere in the formula bar. This positions the insertion point in the cell or formula bar. To move the insertion point to the end of the cell contents, click the cell and press F2.
2. To edit the cell contents, do any one of the following:
  - To delete characters, click where you want to delete them and then press **Backspace**, or select them and then press **Delete**.
  - To insert characters, click where you want to insert them, and then type the new characters.
  - To replace specific characters, select them and then type the new characters.
  - To turn on Overtyping mode so that existing characters are replaced by new characters while you type, press **Insert**.
  - Overtyping mode can be turned on or off only when you are in editing mode. When Overtyping mode is turned on, the character to the right of the insertion point is highlighted in the formula bar, and it will be overwritten when you type.
  - To start a new line of text at a specific point in a cell, click where you want to break the line, and then press **Alt+Enter**.
3. To enter your changes, press **Enter**. Before you press **Enter**, you can cancel any changes that you made by pressing **Esc**. After you press **Enter**, you can cancel any changes that you made by clicking **Undo**  on the **Quick Access Toolbar**.

## Change column width

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

How to change the column width:

1. Click the cell you want to change the column width for.
2. On the **Home** tab, in the **Cells** group, click **Format**.
3. Under **Cell Size**, do one of the following:
  - To fit all text in the cell, click **AutoFit Column Width**.
  - To specify a larger column width, click **Column Width** and then type the width that you want in the **Column width** box.



## Backup data

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

### DVD Write drive

Data is copied onto DVD.

### USB drive

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

### External hard drive

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

### Cloud computing

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

## Presentation of the document

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



### Electronic

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



### Hard copy

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