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Before you begin

This learner guide is based on the unit of competency *TLIE3004 Prepare workplace 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

Your trainer will advise which parts of the learner guide you need to read, and which activities you need to complete. This learner guide will help you in your training.

| Icon | Feature | How you can use each feature |
|---|--------------------|---|
| | Learning content | Read each topic. Speak to your trainer if you need help. |
|  | Activities | Activities give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which activities to complete. |
|  | Video clips | Where you see a QR code, you can use a smartphone or tablet to access video clips about the content. For information about how to download an app that will read the QR code, or for more help, visit our website: www.aspirelr.com.au/help |
|  | Workplace examples | Workplace examples at the end of each topic show how your learning applies in practice. |
|  | Summaries | Key learning points are provided at the end of each topic. |
|  | Words to remember | <p>As you read the learner guide, use the table at the back of the book to write down any words you need to remember. There is a space for you to write the word and a space for you to write down what the word means.</p> <p>You can also access a full glossary of terms via this QR code.</p> |





Topic 1 | What you need to know about preparing workplace documents and completing workplace forms

Good planning helps to create clear, concise documents that are easy for readers to understand.

Planning documents involves finding out why the document is needed and who will be reading it. This helps you work out what information to include and in what order.

You need to follow laws and regulations regarding how to use and collect some documents, particularly when dangerous goods are being transported.

You may need to learn the best ways to use computer equipment to complete and store documents.

When you are writing in the workplace, follow writing conventions to produce text that is easy for the people who will read your document to understand.

In this topic you will learn about:

1A Types and purposes of workplace documents

1B Writing conventions, format and layout

1C Legal, WHS, regulatory and workplace requirements for completing forms and documents

Workplace memos



The purpose of workplace memos is to share information with workers that may affect them.

Examples of workplace memos include:

- a notice about a roster change
- advice that a new handrail has been fitted to a truck.

This type of document will be read by workers.

Diaries



The purpose of diaries is to keep a record of what you do at work; for example, National Driver Work Diaries are necessary for heavy vehicle drivers to comply with fatigue management laws.

Examples of diaries include:

- National Driver Work Diaries
- Electronic Work Diaries

The audience for this type of document is management and compliance agencies.

Logs



The purpose of logs is to record operations over a certain period of time.

Examples of logs include:

- driver logbooks
- running sheets
- delivery details.

The audience for this type of document is supervisors and compliance agencies.

Checklists



The purpose of checklists is to confirm that the work is done according to the SOP.

Examples of checklists include:

- truck start-up check
- task checklists
- loading/unloading checklists.

This type of document will be read by workers.



Activity 1

Question 1

Draw a line from the beginning of the sentence on the left to the end of the sentence on the right.

- | | |
|-----------------------------------|--|
| * The purpose of a document means | * communicates or records information in a clear and consistent way. |
| * An audience for a document is | * what it is for. |
| * A standard document | * who will use it. |

Question 2

What is the purpose of a safety data sheet (SDS)? Tick all that apply.

- ☐ To present statistical information
- ☐ To provide instructions about how to work
- ☐ To share specific information with one person
- ☐ To record risks and responses relating to dangerous chemicals
- ☐ To confirm that the work is done according to standard operating procedures

Question 3

Draw a line from the type of document on the left to match the audience on the right.

- | | |
|--|---|
| * Reports | * Workers |
| * Workplace procedures | * Managers, compliance agencies |
| * Workplace forms and standard documents | * Warehouse workers, suppliers, customers |



Read the following workplace example to see how the concepts you have learned are applied in a real-life situation.

Workplace example for Topic 1

Grant is an administrative employee at a warehouse. Dhiya, the chair of the health and safety committee (HSC), tells Grant that the current filing cabinets he uses are a health and safety risk. He asks Grant to write a short document that compares the features and benefits of two different filing cabinets, and recommend a preferred option.

Grant asks Dhiya when the document is required and who will be reviewing it. Dhiya explains that Grant must get the report to him one week before the next HSC meeting, so it can be circulated to all members. If the HSC agree to proceed, the document will be sent to the safety manager and the finance manager for approval. Dhiya also gives Grant copies of similar documents that have been prepared for the HSC in the past.

Grant researches the different filing cabinets on an office supplies website. He also asks a colleague who uses the same cabinets for his opinion. Grant accesses the company intranet and downloads the organisation's report template to complete his report.

Watch the workplace example video [01m:16s] [here](#).



Summary of Topic 1

1. Workplace documents are prepared to communicate or store information.
2. Find out why your document is needed and who will be reading it to help you decide what information to include and the best format for it.
3. Spellcheck software can help you to follow conventions in spelling and grammar, but needs to be used with care as it can provide misleading information.
4. Having a basic knowledge of grammar can help you to understand information, but you can also search for the correct use of words online.
5. Organisational templates create the format you need for a range of documents. They can save you time when formatting the document and help to ensure you include all the required information.
6. Documents may be produced to meet external requirements, such as work health and safety (WHS) laws or dangerous goods regulations. You may need to identify these requirements and check that the documents you create meet them.
7. Workplace policies and procedures may cover how and when forms and documents need to be completed, including styling and formatting documents. Many organisations have a style guide that explains how to use their logo, what font to use and how to print material.



Relevant authorities and institutions



Management and union representatives



Industrial relations and WHS specialists



Other maintenance, professional or technical staff

Read and interpret information

Information on many of the labels will indicate locations, pallets, individual items and shipments.

During induction training, you will learn to read labels used in your warehouse.

Organisations will vary in the way they identify locations; for example, they may refer to either shelves or racks. The location will be numbered according to the system used in the warehouse.

CB.24.4.2

ITEM: STEERING RACK BOOT KIT

RRB001

Date Rec: 06-03-2017

REC 00045

QTY: 004

SLOC CB.24.4.2

CASES 4



Structure the document

Think about how you will structure the document so the information is presented logically.

Begin by writing a first draft (also known as a rough copy). Depending on the document's purpose, you may need to present background information or the most recent data first.

Most documents, even short ones, include the following sections.

Introduction

An introduction briefly explains what the document or message is about.

Main text

The main text consists of the paragraphs that provide most of the information.

Conclusion

A conclusion summarises the key points and, where relevant, indicates any outcomes, recommendations and actions to be taken.

Considerations for structuring a document include:

- What does the reader need to know first?
- Does the reader need any background information?
- What do you want the reader to do after reading the document?
- Do you need section headings?
- Would tables or graphics display complex information more clearly than text?
- Should detailed information be moved to an appendix?

Clarify jargon

Jargon means specific, technical words used by people in a workplace or industry. To save time, some organisations use abbreviations or acronyms that may not be understood by others; for example, TLI means 'transport and logistics industry' to workers in the industry; however, it may mean 'telephone-line interface' to others outside the industry. Only use jargon if you are sure your audience is familiar with it. If you are not sure, explain the term the first time you use it.

Use bulleted lists

These are a good way to present detailed information because they break it up for the reader.

Read aloud

Read a paragraph or sentence to yourself out loud. This helps you to check your grammar and punctuation, and determine whether your sentences are easy to follow.

Check documents

Check that information in a document is accurate by asking someone else to verify what you have written. Also check that the information is up to date and relevant.

Reading a draft of a document to look for errors is called proofreading. When you proofread, you should delete irrelevant or repetitive material and look for gaps. You should also consider the following questions:

- Is the material comprehensive?
- Is any of the material unclear?
- Would a table or chart help to make the information clearer?

You also need to review the information, formatting and layout. Use this checklist to verify that you have checked all the information in your document.

Document review checklist

- The information is current.
- The information is relevant.
- The information is accurate.
- The information is clear.
- You have consulted all appropriate resources.
- Resources were reliable and unbiased.
- Graphics have been included where appropriate.
- You have kept formatting to a minimum, but used it effectively.

Revise your document

Review the feedback on your document carefully before deciding whether to include it.

Some items, such as typing errors, will be obvious. Others, such as suggestions about content or structure, may be harder to judge. You may need to discuss them with your supervisor or the person who requested the document.

If you have circulated the document to several reviewers, you may receive different suggestions about the same thing.

For example, the finance manager may want more information about costing, while the sales manager may only want the final figures. You may need to ask your supervisor or the person who requested the document for advice about issues you are doubtful about.

To deal with conflicting suggestions, remember how you selected relevant information in the planning stages of the document.

Here are some questions that can assist you to move forward.

Purpose

Which approach best suits the document's purpose?

Audience

Which approach best suits the intended audience?

Compromise

Is there a suitable compromise?

Check with the reviewers if they want to see an updated version of the document before you circulate the final draft.

Obtain written approval if necessary

Some documents may require written approval from a manager or subject specialist before they can be circulated to the intended audience.

This is often the case for external documents or documents produced to comply with legislation.

Check organisational procedures to find out if written approval is required. If so, keep copies of the feedback and approval from these reviewers.