



Perform clerical procedures

D1.HRS.CL1.11

D1.HOT.CL1.05

D2.TCC.CL1.09

Trainee Manual



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Trainee Manual



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& hospitality

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Introduction to trainee manual

To the Trainee

Congratulations on joining this course. This Trainee Manual is one part of a 'toolbox' which is a resource provided to trainees, trainers and assessors to help you become competent in various areas of your work.

The 'toolbox' consists of three elements:

- A Trainee Manual for you to read and study at home or in class
- A Trainer Guide with Power Point slides to help your Trainer explain the content of the training material and provide class activities to help with practice
- An Assessment Manual which provides your Assessor with oral and written questions and other assessment tasks to establish whether or not you have achieved competency.

The first thing you may notice is that this training program and the information you find in the Trainee Manual seems different to the textbooks you have used previously. This is because the method of instruction and examination is different. The method used is called Competency based training (CBT) and Competency based assessment (CBA). CBT and CBA is the training and assessment system chosen by ASEAN (Association of South-East Asian Nations) to train people to work in the tourism and hospitality industry throughout all the ASEAN member states.

What is the CBT and CBA system and why has it been adopted by ASEAN?

CBT is a way of training that concentrates on what a worker can do or is required to do at work. The aim of the training is to enable trainees to perform tasks and duties at a standard expected by employers. CBT seeks to develop the skills, knowledge and attitudes (or recognise the ones the trainee already possesses) to achieve the required competency standard. ASEAN has adopted the CBT/CBA training system as it is able to produce the type of worker that industry is looking for and this therefore increases trainees chances of obtaining employment.

CBA involves collecting evidence and making a judgement of the extent to which a worker can perform his/her duties at the required competency standard. Where a trainee can already demonstrate a degree of competency, either due to prior training or work experience, a process of 'Recognition of Prior Learning' (RPL) is available to trainees to recognise this. Please speak to your trainer about RPL if you think this applies to you.

What is a competency standard?

Competency standards are descriptions of the skills and knowledge required to perform a task or activity at the level of a required standard.

242 competency standards for the tourism and hospitality industries throughout the ASEAN region have been developed to cover all the knowledge, skills and attitudes required to work in the following occupational areas:

- Housekeeping
- Food Production
- Food and Beverage Service

- Front Office
- Travel Agencies
- Tour Operations.

All of these competency standards are available for you to look at. In fact you will find a summary of each one at the beginning of each Trainee Manual under the heading 'Unit Descriptor'. The unit descriptor describes the content of the unit you will be studying in the Trainee Manual and provides a table of contents which are divided up into 'Elements' and 'Performance Criteria'. An element is a description of one aspect of what has to be achieved in the workplace. The 'Performance Criteria' below each element details the level of performance that needs to be demonstrated to be declared competent.

There are other components of the competency standard:

- *Unit Title*: statement about what is to be done in the workplace
- *Unit Number*: unique number identifying the particular competency
- *Nominal hours*: number of classroom or practical hours usually needed to complete the competency. We call them 'nominal' hours because they can vary e.g. sometimes it will take an individual less time to complete a unit of competency because he/she has prior knowledge or work experience in that area.

The final heading you will see before you start reading the Trainee Manual is the 'Assessment Matrix'. Competency based assessment requires trainees to be assessed in at least 2 – 3 different ways, one of which must be practical. This section outlines three ways assessment can be carried out and includes work projects, written questions and oral questions. The matrix is designed to show you which performance criteria will be assessed and how they will be assessed. Your trainer and/or assessor may also use other assessment methods including 'Observation Checklist' and 'Third Party Statement'. An observation checklist is a way of recording how you perform at work and a third party statement is a statement by a supervisor or employer about the degree of competence they believe you have achieved. This can be based on observing your workplace performance, inspecting your work or gaining feedback from fellow workers.

Your trainer and/or assessor may use other methods to assess you such as:

- Journals
- Oral presentations
- Role plays
- Log books
- Group projects
- Practical demonstrations.

Remember your trainer is there to help you succeed and become competent. Please feel free to ask him or her for more explanation of what you have just read and of what is expected from you and best wishes for your future studies and future career in tourism and hospitality.

Unit descriptor

Perform clerical procedures

This unit deals with the skills and knowledge required to Perform clerical procedures in a range of settings within the hotel and travel industries workplace context.

Unit Code:

D1.HRS.CL1.11
D1.HOT.CL1.05
D2.TCC.CL1.09

Nominal Hours:

15 hours

Element 1: Process office documents

Performance Criteria

- 1.1 Process documents with appropriate office equipment in accordance with enterprise procedures and within designated timelines
- 1.2 Identify and rectify and/or report malfunctions promptly in accordance with enterprise procedures
- 1.3 Use office equipment to process documents

Element 2: Draft correspondence

Performance Criteria

- 2.1 Write text using clear and concise language
- 2.2 Ensure text is without spelling, punctuation and/or grammatical errors
- 2.3 Check information for accuracy prior to sending

Element 3: Maintain document systems

Performance Criteria

- 3.1 File/store documents in accordance with enterprise procedures
- 3.2 Modify and/or update records management systems in accordance with enterprise procedures

Assessment matrix

Showing mapping of Performance Criteria against Work Projects, Written Questions and Oral Questions

Element		Work Projects	Written Questions	Oral Questions
Element 1: Process office documents				
1.1	Process documents with appropriate office equipment in accordance with enterprise procedures and within designated timelines	1.1-1.3	1,2,3,5,6,7	
1.2	Identify and rectify and/or report malfunctions promptly in accordance with enterprise procedures	1.1-1.3	8, 9,10	
1.3	Use office equipment to process documents	1.1-1.3	11, 12	
Element 2: Draft correspondence				
2.1	Write text using clear and concise language	2.1	13,14,15,16, 17,18,19, 20,21,22	
2.2	Ensure text is without spelling, punctuation and/or grammatical errors	2.2	23,24	
2.3	Check information for accuracy prior to sending	2.3	25,26, 27	
Element 3: Maintain document systems				
3.1	File/store documents in accordance with enterprise procedures	3.1-3.2	28	
3.2	Modify and/or update records management systems in accordance with enterprise procedures		29,30	

Glossary

Term	Explanation
Amendment	A change or improvement in a document.
Back-up system	A system used to store information for security purposes in case the computer system crashes.
Byte	8 bits
CD-ROM	Compact Disc Read Only Memory, which enables the storage of large amounts of text or data.
CD-R	Compact Disc Recordable
CD-RW	Compact Disc Rewritable
Database	A computer software program used to store and organise a range of records or data.
Data storage	The saving of data to a device such as a floppy disk, CD-ROM, hard drive or a back-up system.
Digital camera	A camera that converts photos into digital images that can be loaded directly onto a computer.
Directories	Tables that contain file information such as name, file, size, time and date of last modification.
DVD	Digital Versatile Disc
Ergonomics	The study of the environment and conditions of work, in order to achieve maximum efficiency and tailoring the physical environment to individual requirements.
File generation	Creation of a new file for information, either on the computer or in a filing cabinet.
Floppy-disk drive	The drive into which a floppy disk may be placed to either save information or read the information stored on it.
Hard drive	The drive within a computer that stores information and enables the computer to run.
Keyboard	An input device with a set of keys used to enter information into a computer.
Log-on	The use of a password to open or access files on a computer system.

Term	Explanation
Manufacturer's guidelines	A booklet setting out the manufacturer's conditions of use for a piece of equipment.
MB	Megabytes
Modem	A piece of equipment that enables the transfer of information from one computer to another via a telephone line or communications cable.
Numerical key pad	Set of number keys on the keyboard.
Printer	A device that prints text or graphics on paper or other media.
Routine maintenance	Ensuring that computers and other equipment are looked after, for example by replacing consumables, clearing paper jams etc.
Scanner	A piece of equipment that copies a document or image directly into a computer.
Spreadsheet	A computer software program used to store and calculate lists of numbers or statistics.
Sub-directories	Directories located within another directory
Technology consumables	Paper, toner, bulbs and other items that must be constantly replaced as they are used or consumed by office equipment.
Zip drive	A high-capacity disk drive, similar to a floppy drive.
Backup	A method of storing files for use in an emergency. The backup medium includes tape, disk or CD
Defrag	Defragmentation is the process of locating the non-contiguous fragments of data into which a computer file may be divided as it is stored on a hard disk, and rearranging the fragments and restoring them into fewer fragments or into the whole file.
Hard Copy	The output from software applications printed and stored on paper.
Inventory	A record of items in stock. This is used to track consumables or to accurately describe devices.
Maintenance	Maintenance refers to rectifying faults and changing settings or components to ensure that equipment continues to work effectively.

Term	Explanation
Non-routine Maintenance	When a device or its components are serviced to rectify a specific fault. Procedures such as replacing a faulty floppy disk drive or adding extra RAM to a poorly performing computer are some examples of non-routine maintenance.
Print Server	A network node which stores print jobs and then passes them to the printer. This action frees up the network from the slow printer output speed causing network congestion.
Printer Bubble Jet	A printer which uses the process of spraying the ink onto the page by superheating a bubble of ink to eject the spray onto the paper.
Printer Dot Matrix	An impact printer that uses a series of pins to press an inked ribbon onto the paper surface to create a character or image.
Printer Driver	The software the printer uses to interpret the signals from the various applications that have the ability to output hard copy.
Printer Impact	A printer that forms the characters and images on the paper by physical contact. They can be used to make a real time carbon copy.
Printer Ink Jet	A non-impact printer that sprays the ink onto the paper through a series of fine nozzles.

Element 1: Process office documents

1.1 Process documents with appropriate office equipment in accordance with enterprise procedures and within designated timelines

Unit application

This unit describes the performance outcomes, skills and knowledge required to complete a range of routine office procedures and activities, including writing simple correspondence. As hospitality staff, you will need to perform office procedures, either full-time (for those working in an office environment) or on an occasional basis (for those working in a stock control environment or kitchen).

Introduction

This section identifies the processes that are involved with documentation, and the types of documentation that may be found in hospitality office environments. Processing of documents may include (but is not limited to) recording receipt or sending of documents, mailing (including bulk mailing), photocopying, faxing, e-mailing, collating, binding, and banking.

Office documents may include (but are not limited to) guest mail, customer records, incoming and outgoing correspondence, letters, facsimiles, memos, reports, menus, banquet orders, financial records, invoices, and receipts.

Irrespective of the business you are working in, you will need to follow industry guidelines.

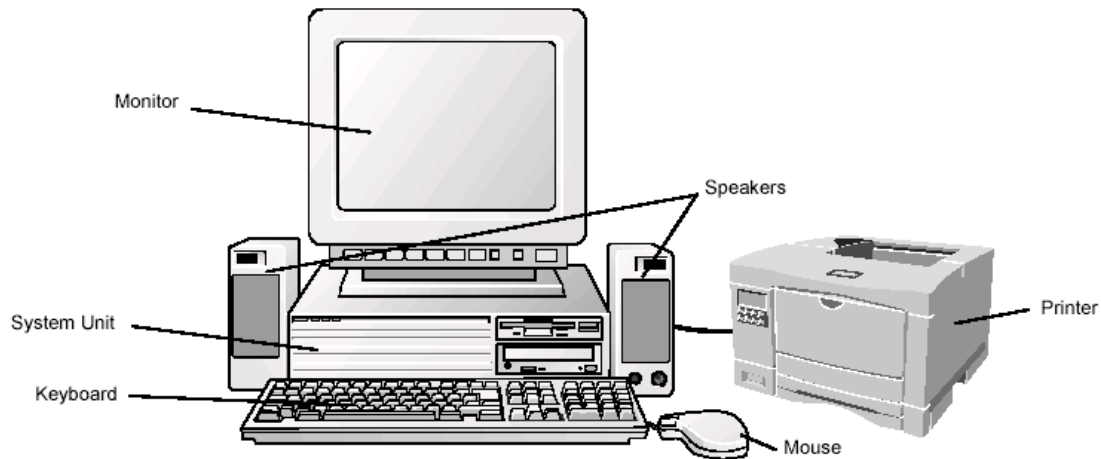
Processing documents

As part of their daily duties, hotel receptionists and certain other staff will have to process documents in accordance with enterprise procedures and within required timelines.

Office equipment

A computer (also referred to as a PC) can be used for various functions e.g. word processing, spreadsheets, databases, business accounting, desktop publishing, accessing the Internet, sending email, playing games, movies, music etc.

A typical standalone computer system is shown below:



Monitor (or Screen or VDU - Visual Display Unit)

The monitor (or screen) enables the operator to view data (and to alter it before printing it out).

System Unit containing CPU (Central Processing Unit)

The System Unit can contain storage devices such as a hard disk, floppy disk drive and CD ROM drive. A chip (called a Central Processing Unit) within the system unit processes data and relays messages to and from the keyboard, monitor, disk drives and printer.

Keyboard

The computer keyboard has the standard QWERTY layout with extra keys for specific functions. The name comes from the first six letters (keys) appearing in the top left letter row of the keyboard, read left to right: Q-W-E-R-T-Y.

Speakers

The speakers play sound when sound-capable features are accessed on the computer.

Mouse

A mouse is used to select menu options, text and graphics displayed on the monitor.

Printer

A printer is used to print text and graphics onto paper.



Different Types of Computers

Notebook or Laptop

These are portable computers which are used by people “on the go”. A notebook is similar in size to a standard book. A laptop is larger than a notebook. They are both lightweight, very convenient but are not as fast as a fixed PC, have a shorter battery life and can easily be damaged if not taken care of.

Laptop Components



Touch Screen PC

This is a PC that can be held in the hand. A touch screen looks similar to a notebook/laptop monitor, though they can vary in style. A special pen is used to access different menu options on the touch screen. There is no keyboard or mouse.

Palmtops

Mini computers are designed to perform basic computer functions and fit in the palm of the hand. Many are used in conjunction with a normal PC. There are different styles available. Two common types are shown. You can transfer data from your PC to the Palmtop as reference or to edit on the go. The palmtop is not as powerful as a PC. Palmtops can be connected to the internet, or to a PC and are useful when travelling to send and receive email.



Tablets/ I pads and I phones

IPads and android tablets are a combination of a modern smart phone and a laptop computer. Business owners often use tablets to get tasks done on the run, create presentations for meetings and update websites and blogs. They are lightweight, compact and affordable. They can easily be synchronised with your computer when returning to the office.



What are hardware and software?

Hardware

The physical components of a computer system - everything that you can touch - are called hardware.

Software

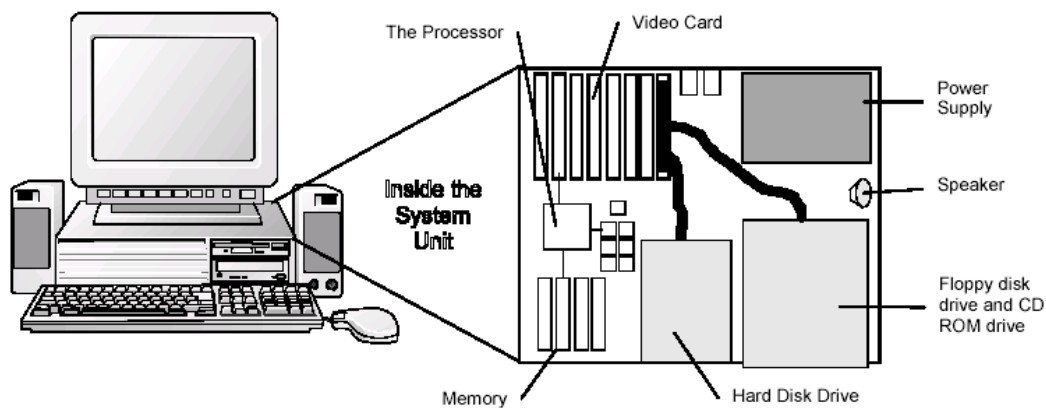
The programs used on a computer are called software. This includes system software (such as Windows, Mac OS etc.) and application software such as Microsoft Word, Microsoft Excel, etc. System software is necessary in order to run a computer and all applications within it.

The System Unit

The System Unit contains the Central Processing Unit (CPU - also referred to as the “processor”), motherboard, memory, video card, sound card, and other internal devices. It also has disk drives for storage media, and ports for external devices.

The Processor

The Central Processing Unit (CPU) is the brain of your computer. It is a “chip” where your computer interprets and processes information. It relays messages to and from the keyboard, monitor, disk and printer.



Hard Disk, Floppy Disk, USB/Memory sticks and CD ROM Drives

Drives are used to store and access data. A hard disk drive is a permanent storage device within your computer. Floppy disk, USB/Memory sticks and CD ROM drives allow you to read data from portable media (CDs, floppy disks and external hard drives).

Video Card

A video card fits inside your computer and determines the resolution (fineness of information) and number of colours your monitor can display. In addition to colour, some video cards allow the display of graphics such as graphs, circles and geometric designs as well as text.

Memory

Your computer has a brain that processes information and a memory that stores the information.

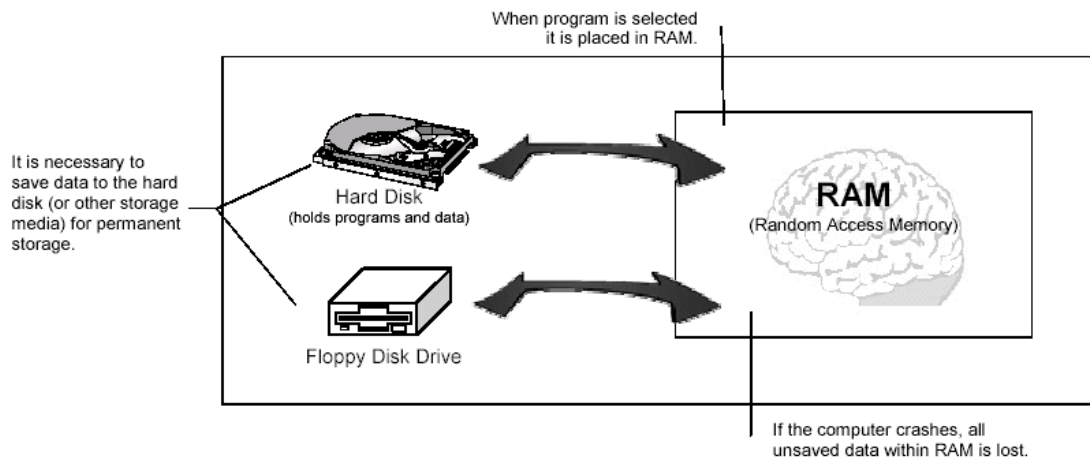
The memory is not a permanent storage place for information. It is only active while your computer is turned on. When your computer is turned off the memory is erased from the computer. This is called Random Access Memory (RAM). To avoid losing your work you should save data on an external hard drive or a disk (i.e. hard disk or floppy disk) for permanent storage.

ROM (Read-Only Memory)

ROM holds data/instructions relating to your computer e.g. ROM may store small programs that can change the configuration of your computer. The data/instructions held within ROM memory cannot be altered. When your computer is turned off the data/instructions within ROM will remain (i.e. will still be there when you next turn your computer on).

RAM (Random Access Memory)

RAM is a set of memory chips that hold data temporarily. This data can be accessed and edited as required. When you turn off your computer the data stored within RAM is lost. When you open a program, it is placed in RAM. When you exit a program, it is removed from RAM. If a machine crashes, all that is in RAM, i.e. programs and/or data, is lost.



In order to use computer technology correctly, it is important to know the manufacturer's instructions, as well as the organisation's policies and procedures regarding:

Booting up, logging on and logging off

File management program (identifying / opening files)

Modifying files

Saving and closing files

Printing files

1.2 Identify and rectify and/or report malfunctions promptly in accordance with enterprise procedures

Introduction

Large hospitality enterprises may have their own IT department who will help you with equipment break down and routine maintenance procedures. However, if you work for a smaller company, it is wise for you to schedule routine maintenance with a contractor.

Preventative Maintenance

Routine or preventative maintenance ensures that the computer equipment will remain in good working order. An example of preventative maintenance on computer equipment is the cleaning of your keyboard, monitor and mouse.

The keyboard can be cleaned by turning the keyboard upside down and gently tapping the bottom of the keyboard. Monitors can be cleaned with a damp cloth. The mouse requires regular maintenance as the tracking ball under the mouse collects dust as it rolls inside the mouse. To clean the mouse, turn it upside, remove the panel, and clean the tracking ball and the rollers inside the mouse.



Remember to keep dust away from the air vents.

Printers require routine maintenance as well. Clearing out paper jams, changing cartridges and cleaning the printer will lengthen the life of your printer. Most printers have a print head cleaning function or you can use a print head cleaning kit. Make sure that you read the manufacturer's instructions before you perform any maintenance.

Consumables like floppy disks, CD's and paper require correct storage to ensure that they will be usable when required. They should be stored in a clean, dry area. To ensure that the moisture content of the paper is kept at an optimum level, paper should be stored in a sealed container. Moist paper tends to curl and jam in the paper path of a printer.

Routine maintenance

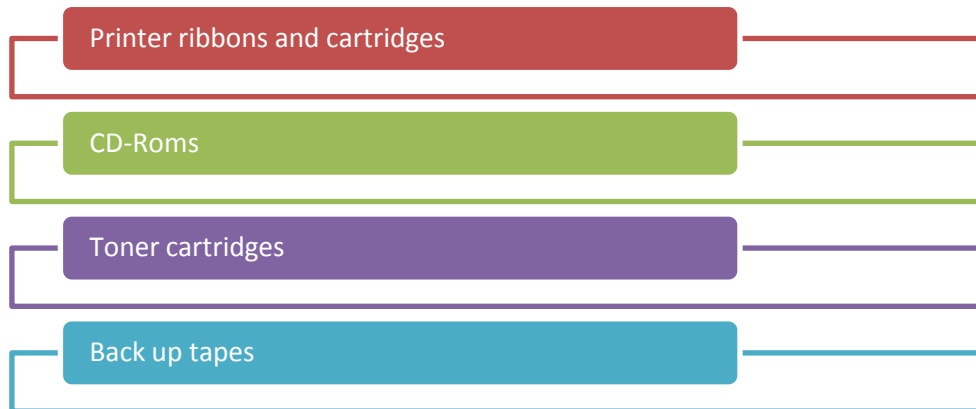
It is important that routine maintenance of business technology is carried out on a regular basis to ensure minimal breakdowns. Equipment should be cleaned regularly by using a damp cloth or other approved cleaning materials. Consumables should be checked to monitor their rate of use, and replaced when needed. Regular servicing by qualified or manufacturer-approved technicians will ensure that all equipment is in the best condition possible to minimise breakdowns.

All employees should receive training to solve common faults, like paper jams, system failures and low ink or toner cartridges. However, more complex problems should be reported immediately to the person in charge of maintenance, to the manufacturer or to the service company. Many companies keep a logbook of service visits.

DATE	METER	PROBLEM & REMEDY	OPERATOR	SIGNATURE
28/02/14	1750	TESTED Keyboard - Testing done To check - keys are open so it's fine No problems found. But should check connections of cables. All's fine. Power cables. Please call him at 1001	CSK	
28/02/14	2100	Loaded CD. Program CSK File. Run. BAREP Bare	CSK	
22/30		Talked to SRP Host to Host CSK	CSK	
		Left up program CSK running after sending a host dead message to imp.	CSK	
30/02/14	1030	Stopped up pump checked TAPST & have host trouble on TAPST (CSK)	CSK	

Technology consumables

In the course of completing work tasks, it is important that you know how to identify and replace technology consumables rather than calling the IT department or appropriate maintenance personnel. Technology consumables are:



To order, you will need to fill out a requisition form or an order form.

Other consumables include floppy disks, the cheapest type of storage media, although they are already obsolete in some countries. The most common type of storage in most countries is a hard drive. Another medium of storing data at low/medium cost is a zip disk which allows you to store up to 750mB of data.

1.3 Use office equipment to process documents

Introduction

In order to select the right technology and software to complete a task, it is important to understand the functions of the office equipment and each type of software. When starting a new job or when a new piece of equipment is purchased, you should be trained in the main functions of the equipment, how to operate the equipment, Occupational Health and Safety issues and routine maintenance.

Selecting the right technology and software



Hardware	Software applications
<ul style="list-style-type: none"> • Computers, including laptops • Digital cameras • Zip drives • Modems • Printer/scanner/photocopier combination • Facsimile • Paging equipment • Calculators • Audio-transcribing machine • Telephone answering machines • External hard drives • Ergonomical mouse. 	<ul style="list-style-type: none"> • Email and Internet browsers (Outlook) • Word processing (Microsoft Word) • Spreadsheets (Excel) • Databases (Excel) • Work project • Accounting packages (Myob) • Presentation packages (Ppt) • Manage files (Office Manager).

Work Project 1.1-1.3

It is a requirement of this Unit that you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

In groups of 2 you are to set up a new office for an Adventure Tourism Company in Bangkok. Give the company a name. Your company will have 4 employees which will consist of one Director, one Operations Manager, one Operations Assistant and one Marketing Coordinator. Your office will be in an office building, within the central business district. Create a layout which reflects the needs of these 4 employees.

Research needs to be undertaken taking into consideration business technology that you would require including hardware and software, and factors of ergonomics.

PART A – Written Report

1. You are to provide a layout of the office space.
2. What office equipment including business technology would you select for your new company?
3. List 2 benefits and 2 disadvantages of the equipment chosen.
4. What is the cost of the equipment? Provide a detailed breakdown.
5. How would you maintain this equipment? In-house or outsourced? Explain why you would choose in-house or outsourced?
6. Besides Microsoft Office and Summit Pro, name 2 other software packages you would choose for your office.
7. List 2 benefits and 2 disadvantages for each of the software packages chosen.
8. How would you ensure the set up of the office is ergonomic?

PART B – PowerPoint Presentation

Use the answers from Part A to create a PowerPoint presentation which satisfies the following:

You are to present to the owner of the company what you believe would be the best layout, furnishing, and equipment (hardware and software) for the new Adventure Tourism Company office. You have to sell the benefits of your choices to the owner.

The following must be evident in your PowerPoint presentation:

- Master slide – background used on all slides
- Text layout – 3 different text or content layouts to be used
- Bullets, Tables, Clip art, Charts, Diagrams or Multimedia – use 3 different modes
- Slide animation/transition – used on at least 6 slides
- Minimum 10 slides and maximum 20 slides

- Slides have 5 or less points per slide, legible script with appropriate background, appear professional (less is more) and demonstrate mastery of professional principles
 - Less is more. What does this mean in terms of presentation?
- Consider the overall appearance of the PowerPoint very carefully.

A copy of your PowerPoint presentation must be submitted in hardcopy (6 slides per page).

Summary

Process office documents

In this section (Element 1) you have learned how to process documents with appropriate office equipment such as PCs, scanners, pagers, faxes, copiers, etc. Processing of documents must be done in accordance with your company procedures and within the timeline you are given.

This element also describes the maintenance techniques for keeping your computer, keyboard and peripherals clean. Again, it is important you follow your company's guidelines.

Finally, Element 1 explains the difference between hardware and software (the programs).

Element 2 will cover different types of correspondence you may be using in a hospitality environment.

Element 2: Draft correspondence

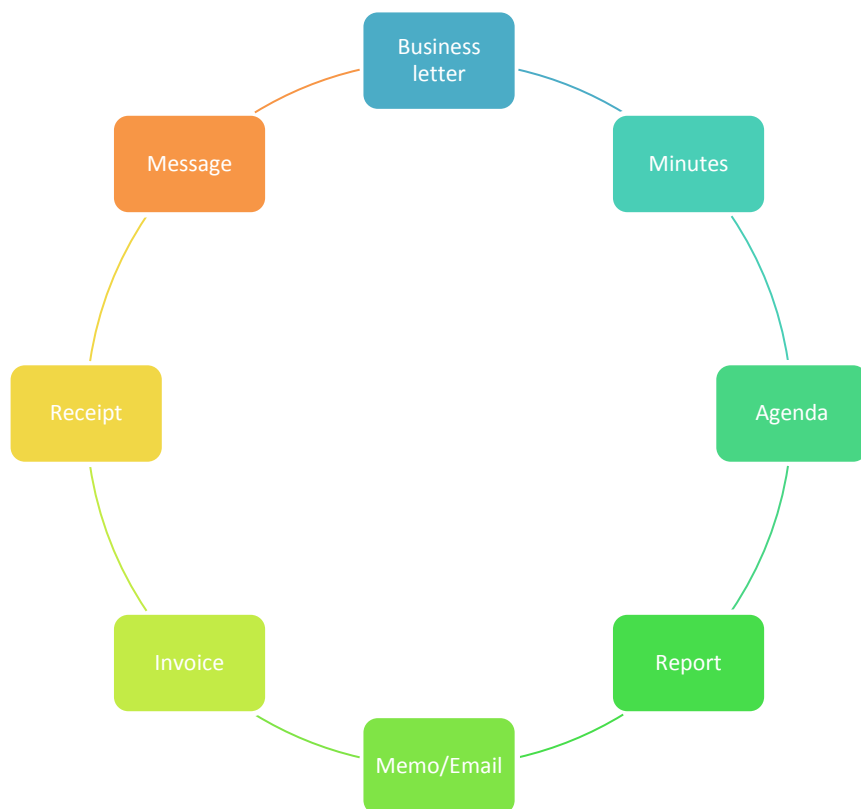
2.1 Write text using clear and concise language

Introduction

If you know how to write well, your correspondence will get results. Good correspondence organises relevant information, identifies the writer's purpose, and presents it in a way that suits the context.

Office documents

In business, certain types of records, forms and modes of correspondence are used daily. To run a business effectively it is important that you are able to utilise the types of office documents as shown below automatically.



Determine audience and purpose

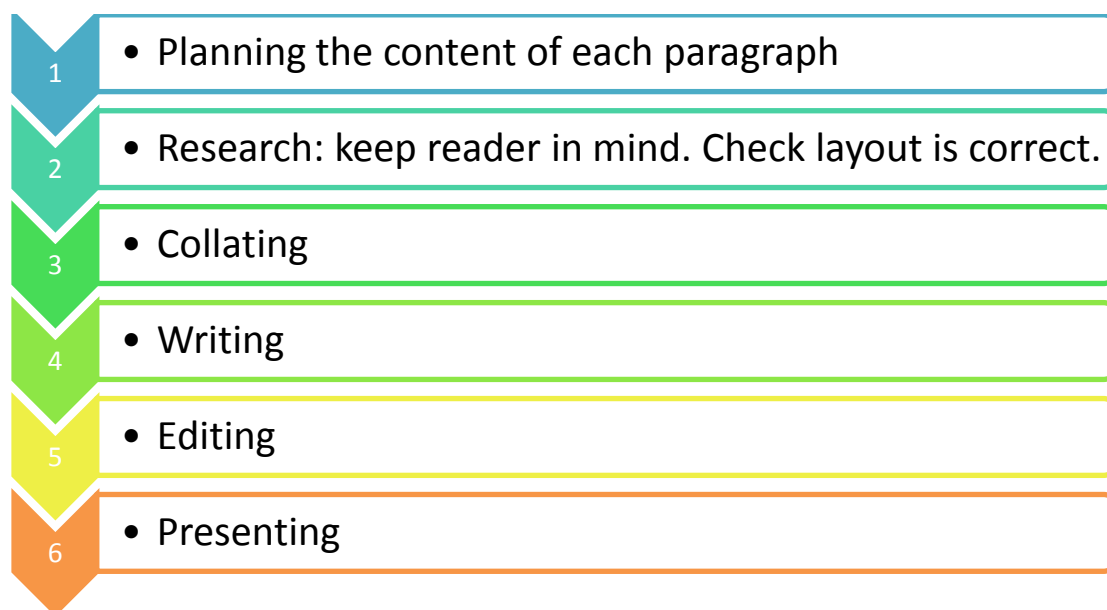
- Who is your audience?
- What is your objective? Is it to enquire, inform, persuade, motivate or to gain visibility?
- What do you want them to do with the information?
- Are they supposed to read the entire document or just part of it?
- Do they need quick points for reference?

Obtain special assistance where appropriate and within budget parameters

If you are writing a complex document, seek advice and information from other personnel and resources.

Conduct research

Basic steps:

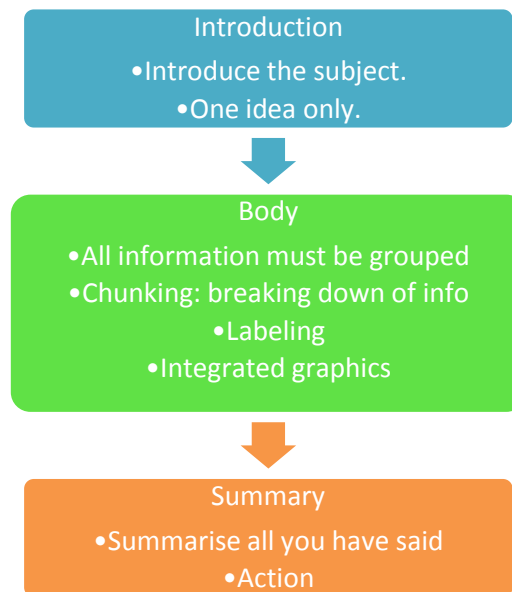


Analyse and assess data for relevance prior to incorporation into document, identifying key issues.



Prepare documents

Basic principles



Use a suitable format, structure and style.

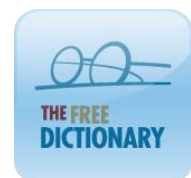
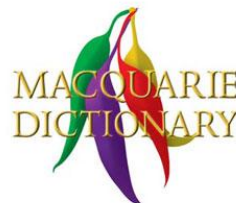
Defining, designing and writing the document

Define the scope, purpose and reader needs. Design the structure, content and layout. Write and edit the document.

Spelling:

Dictionaries:

- www.dictionary.com
- www.thefreedictionary.com
- www.thesaurus.com
- www.macquariedictionary.com.au



Spelling rules:

- Use 'ise' not 'ize' e.g. we organise (not organize)
- Capitals: at beginning of proper nouns, beginning of sentences. Do not capitalise all your writing as it can be interpreted as yelling
- Numbers: write them as figures (5, 10) except for at the start of sentences

- 'I before e' except after c' rule: this works only when the pronunciation of the word is like a long 'ee' for example: piece, niece but exceptions are receive, receipt
- Doubling the consonant: For most words with a short vowel sound, ending with a single consonant, double the consonant when adding a suffix that starts with a vowel, such as *er*, *ed* or *ing*. For example: biggest, hotter, travelling. Exceptions: Some words ending in r, x, w or y are exceptions to the doubling rule:

tear + ing	→	tearing
vow + ing	→	vowing

- If your main word has two consonants at the end, or more than one vowel, don't double the consonant for example: raining, keeper
- Word endings in *-ce/-ge*: When you want to add a suffix starting with 'a' or 'o' leave the e in. For example: manageable, noticeable. Exception: prestigious
- Word endings in *-ie*: When you want to add *ing* to verbs ending in *ie*, drop the e and change the i to a y. For example: die – dying, lie – lying, tie – tying
- Words ending in *-y* after a consonant: When you want to add suffixes such *-as*, *-ed*, *-es*, *-er*, *-eth*, *-ly*, *-ness*, *-ful* and *-ous* to a word ending in y after a consonant, change the y to an i before adding the suffix. For example:

eighty + eth	→	eightieth
duty + es	→	duties
lazy + ness	→	laziness
mystery + ous	→	mysterious
beauty + ful	→	beautiful

- Words ending in *-y* after a vowel: keep the y when adding suffices such as *er*, *ing* or *ed*. For example:

play	→	playing	→	played
buy	→	buying	→	buyer
play	→	playing	→	player

- Appendices: should be numbered
- Attachments: external documents that should not be included in the body of the document.

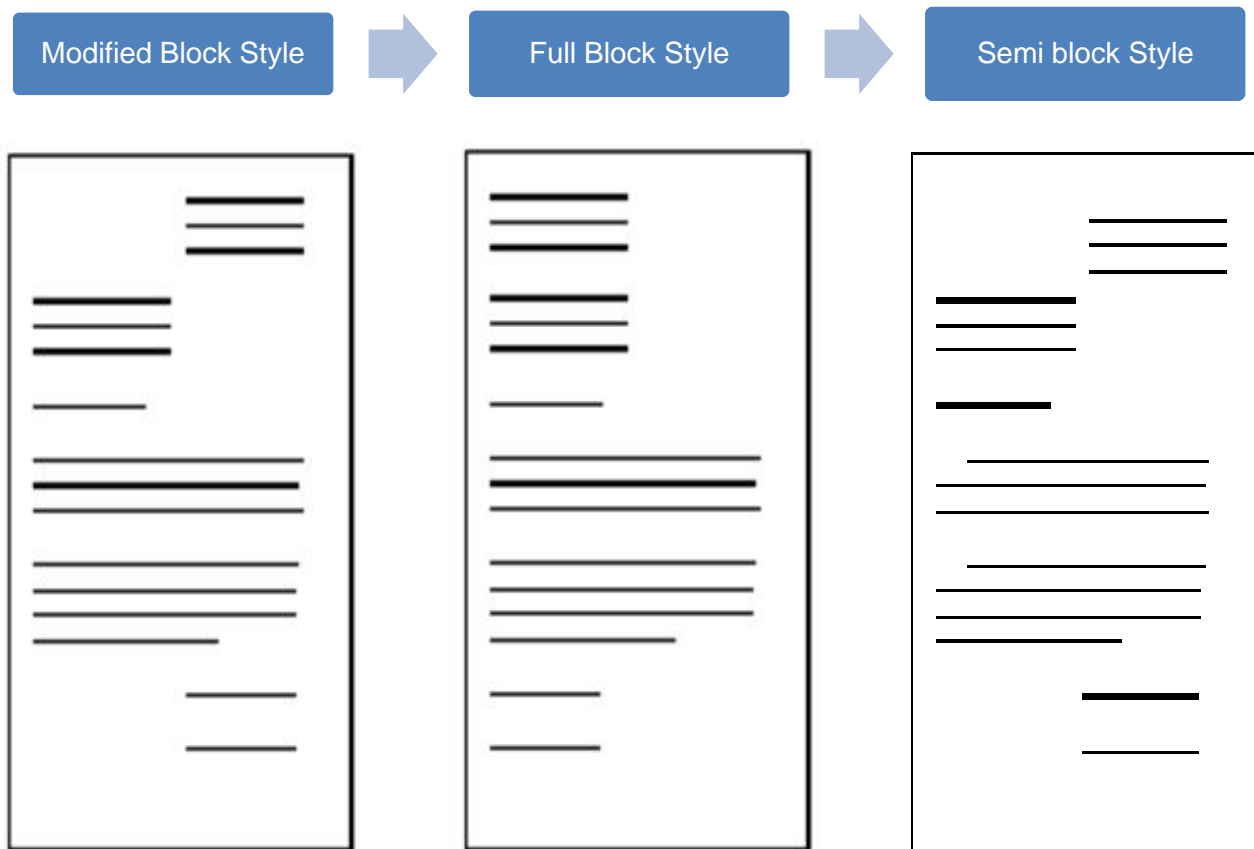
Six steps to good writing:

- 1: • Be clear about your purpose
- 2: • Plan what you will say
- 3: • Draft your document
- 4: • Edit
- 5: • Type the final draft
- 6: • Proof read




Background Notes

Styles of Letters



Guidelines for basic business documents

Letterhead



555 La Trobe Street, Melbourne 3000
Ph: 96062111 Fax: 96062114
Email: birgittam@angliss.edu.au

Essential Parts	Optional Parts
Writer's name and address	Subject line
Date	Attention line
Inside address	Reference initials
Greeting or salutation	Enclosure
Body of the letter	File number
Complimentary close	Sender's telephone extension
Writer's signature and job title or designation.	

The Complimentary close should match the form of address used in the salutation.

Dear Sir	Dear Ms Pham	Dear Ploy
Yours faithfully	Yours sincerely	Yours sincerely

The Memorandum (Memo)

The main difference between a memo and a letter is that a memo is in-house. It is not sent to people who do not work within the organisation.

Essential Parts	Optional Parts
To From Date Subject	Cc

Memo



Date: 19 December 2012
 To: Hospitality staff
 From: Birgitta March
 Re: Work placements

You are invited to a meeting to discuss work placements for our hospitality volunteers for the upcoming New Year's Eve function.

Time: 10 am
 Date: 22 December 2012
 Where: Meeting room B245, level 3
 R.S.V.P: By 21 December 2012
 Email: birgittam@angliss.edu.au

I hope you can all attend.

Routine Letters

The routine correspondence can be planned in three steps.

Opening Paragraph	Middle Paragraphs	Ending Paragraph
Refer to the communication they sent to you	Provide complete information	Include a goodwill close

1) Most routine business letters begin by referring to previous correspondence:

- Here is the information you asked for in your letter of 12 November.
- In your letter of 9 June, you asked for...
- In reply to your letter of 8 August...

Or your letter may be in response to a telephone call or a in-person conversation. Then you might write:

- Following our conversation this morning...
- Your telephone call this morning reminded me that...

2) Providing complete information means giving all the necessary details.

This involves trying to answer any possible questions that the reader may want to ask. A bulletin or brochure is a useful way to minimise detail in letters.

3) We close our letter with a note of goodwill, to avoid sounding abrupt.

Good News Letters

Opening Paragraph	Middle Paragraphs	Ending Paragraph
Write the good news	Provide relevant detail	Repeat the good news

The opening paragraph can begin with the good news and remove any uncertainty the reader may have about our response to their situation:

- Although the warranty on your heater ended six months ago, we have decided to replace it without further charge
- We overestimated the costs of repairs to your roof. The account will be \$700.00 less than we anticipated.

The middle paragraphs of our correspondence provide the reader with detailed explanation of what has taken place.

The final paragraph in the letter can again refer to the good news. Please telephone our office to make a suitable time for our plumber to fit your new heater. Our cheque for seven hundred dollars is enclosed.

This pattern of writing a good news letter is well balanced and leaves our reader with positive thoughts about our product and our company.

Writing Good News or Neutral Letters

The content of different types of positive or neutral letters will vary. Listed below are four different types of good news letter.

1. AN INQUIRY	2. A REQUEST
A letter of inquiry asks others to share information and ideas	A letter of request seeks a specific action eg. A purchase order
3. AN AKNOWLEDGMENT	4. A LETTER OF INTRODUCTION
A letter of acknowledgment acknowledges requests for information, confirms orders, supplies information and thanks the reader.	A letter of introduction aims to maintain contact and create goodwill and the opportunity for future sales or business.

LETTER WRITING STRATEGIES – Good News or Neutral Letters

1. Inquiry

- Identify the inquiry in the subject line
- Open with the inquiry and a short background if necessary
- Indicate the need for the receiver to respond
- Close in a courteous and friendly manner

2. Request

- Identify the request in the subject line
- If you chose to omit the subject line, identify the request and give a brief reason or background for the request in the opening paragraph
- Ask for a specific response to the request
- Close courteously to maintain goodwill

3. Letter of acknowledgment

- Start with the acknowledgement
- Say 'yes' clearly when relevant
- Supply any necessary information or details
- Close courteously to maintain goodwill

4. Letter of introduction

- Use the subject line to catch the reader's interest
- Open with a reason for the introduction and aim to catch the reader's attention and interest
- Use details and information in the middle paragraphs to create a desire to read further

- Close by saying what you can do for the reader and what you want the reader to do
- Letter or request (good news letter) using modified block layout with indented paragraphs.

Order of information

PARADISE EVENTS



971 Ploenchit Road
Pathumwan, THAILAND 10330
Ph: 1800-578-252

4 February 2012

Aat Yodsuwan
H & R Publishing Group Pty Ltd
1022 Phetchburi Road
Bangkok THAILAND 10400

Dear Aat,

Re: Order for Brochure for Paradise Events

Subject Line

I would like to place an order for the printing of the advertising brochure for Paradise Events.

Identify the request

Our advertising is booked on Order No. 5565, customer No 332345. I have enclosed a proof for the printer to assess the colours. Please return the proofs after the print run.

Background details

I would appreciate your prompt handling of this order so that we may have the brochures by 1 March.

Specific response

Please contact me if you have any questions. I am most happy with your previous work and look forward to receiving this order.

Courteous close

Yours sincerely

Apichart Kasem

Manager

Bad News Letters

The bad news letter can be planned in three steps.

Opening Paragraph	Middle Paragraphs	Ending Paragraph
Allude to the situation with a neutral comment	Give details and reasons. State the bad news. Provide workable alternatives.	Close with a neutral or positive statement.

1. We start with a statement of fact which is a neutral statement concerning the situation:
 - The heating unit that you returned has been checked by our laboratory
 - The cost of the repairs to your roof which we originally estimated at \$8000 can now be compared with the actual costs of the materials.
2. We must provide details and reasons before we fully reveal the bad news. We must explain some of the factors that have influenced our decision.
 - In the process of installation your heater has received some damage which has stopped the flow of water into the unit. Broken pipes may result from improper positioning during installation or from mistreatment on the pipes once they are in place.

In that same paragraph we then state the bad news.

- Consequently we cannot provide the requested coverage at this time.
3. Close with a neutral or positive statement.
 - We can recommend an excellent tradesman to correctly install one of our new heaters
 - Thank you for thinking of us for your heating needs.

Do not close your letter by asking them if you can help them in some other way, since you were not able to help them this time. Avoid the urge to apologise to them in the final paragraph. You have done all that is possible for you to do, so you do not need to apologise.

Writing Bad News Letters

Listed below are four different types of bad news letters and guidelines for writing them.

1. ORDER REFUSAL	2. SAYING 'NO' TO A REQUEST FOR CREDIT
An order refusal declines a request	A credit refusal rejects a request for credit
3. REFUSING AN ADJUSTMENT	4. DECLINING INVITATIONS AND REQUESTS FOR FAVOUR
An adjustment refusal is a request to change, replace or adjust a transaction that has already taken place	An invitation or request refusal

LETTER WRITING STRATEGIES – Bad News Letters:**1. Order refusal**

- Start with an acknowledgment of the order
- Give an explanation with reasons that lead to the refusal
- State the refusal
- Close with a positive, courteous paragraph which expresses interest in a continuing relationship with the customer in the future.

2. SAYING 'NO' TO A REQUEST FOR CREDIT

- Start with a neutral opening or buffer paragraph
- Give an explanation of the factors considered in the decision
- State the refusal clearly and courteously
- Close with a positive, courteous paragraph which invites the receiver to contact your organisation in the future.

3. REFUSING AN ADJUSTMENT

- Start with a buffer paragraph which acknowledges the request for the adjustment
- Give a positive explanation of the reasons for the decision
- State the refusal courteously
- Close with positive language in an attempt to maintain the customer's goodwill.

4. DECLINING INVITATIONS AND REQUESTS FOR FAVOUR

- Start with a neutral buffer, preferably an appreciation of the invitation or request
- Give an explanation and reasons
- State the refusal clearly, courteously and tactfully
- Close with a positive paragraph which expresses interest in the other person or organisation.

Effective bad news letter
refusing employment (full
block layout)

Order of information

Neutral buffer

Explanation

Refusal

Positive close

Yen Recruitment

Hai Ba Trung Street
Hanoi, VIETNAM 102222-153343
Ph: (03) 9822 3456
yen@yenrecruitment.com

27 February 2012

Ms Dung Pham
2 Cong Quynh St., District 1
Hanoi, VIETNAM 102222-153589

Dear Dung,

Thank you for the time you gave up to attend an interview with Bao Bui recently. Bao enjoyed meeting with you and hopes you found the discussion informative.

We can, of course, only invite a proportion of the candidates we meet to the second interviews. Consequently, our evaluations are made using a number of key criteria. The difference between those selected for follow-up and those who miss out is sometimes marginal. However, with a set number of positions available we hope you will understand the difficulty in making final decisions.

While your application has been given serious consideration, we regret to advise that, on this occasion, we will not be offering you a second interview.

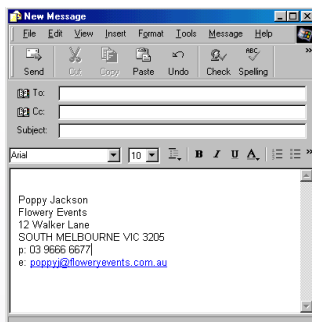
We appreciate your interest in our firm and wish you every success in your future career.

Yours sincerely,

Yen Truong
Personnel Officer



Background Notes



Add a Signature to Email in Microsoft Outlook

1. Open Microsoft Outlook. This can be done from a shortcut on the desktop, from the Start menu or from the Quick Launch Bar if you have enabled it on the taskbar
2. Click the "Tools" menu on the menu bar
3. Click "Options"
4. Click on the "General" tab
5. Click the "Email Options" link
6. Click the "Email Signatures" tab
7. Enter the title of the signature in the title box. The title of the signature is important, especially if you plan on using more than one signature for your emails (one for personal emails, one for professional, one for fun, etc.)
8. Fill in the body of the signature in the text field titled "Create your email signature." Here you can include plain text, as well as pictures, animated images (in the form of HTML links) and anything else that can be displayed in a HTML enabled email server
9. Click "Add" to finalize the signature
10. Click the "New" button to create another signature. You can simply repeat steps 7, 8 and 9 to complete the process. You may continue to add signatures until you are done.

Source: http://www.ehow.com/how_2048574_add-signature-email.html#ixzz1Ts6EJKYE

Work project 2.1

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

1. You are the owner of a very busy Bangkok restaurant. Business has been good and to reward your staff for their hard work, you are organising a party on 20 June 2012 at 8 pm. Please type up a memo to your staff advising them of the party and inviting them to bring their partner and/or family. You want to hold the party in your own apartment above the restaurant. For catering purposes, you need them to respond by 14 June.

Please ensure you:

- Design a professional memo layout
- Use correct memo spacing
- Do a spell check and grammar check.

Save your memo on your USB under the new folder "Homework". Name it "Memo_20June2012".

Email

Email is an inexpensive, rapid and useful tool. Rules are:

- Keep to one subject per email
- One screen
- Focus: Who? Why? What?
- Avoid 'send all' where possible
- To: recipient - action
- CC: copy - information only
- BCC: blind copy – cannot be seen by everyone
- Attachments: no novelty attachments in business emails
- Check for viruses
- Avoid emoticons e.g.
- Remember that emails make 4 copies: 1 on your PC, one of the receiver's PC, one on your server and one on the receiver's server.



2.2 Ensure text is without spelling, punctuation and/or grammatical errors

Introduction

Good workplace writing results from thoughtful planning, writing in plain English and careful editing. Each stage is part of the writing process.

At the planning stage, take time to identify your purpose, consider your receiver, decide what you want to say and put this in a logical sequence.

At the editing stage check your work for accuracy and completeness and make sure that your writing is logical, clear and concise.

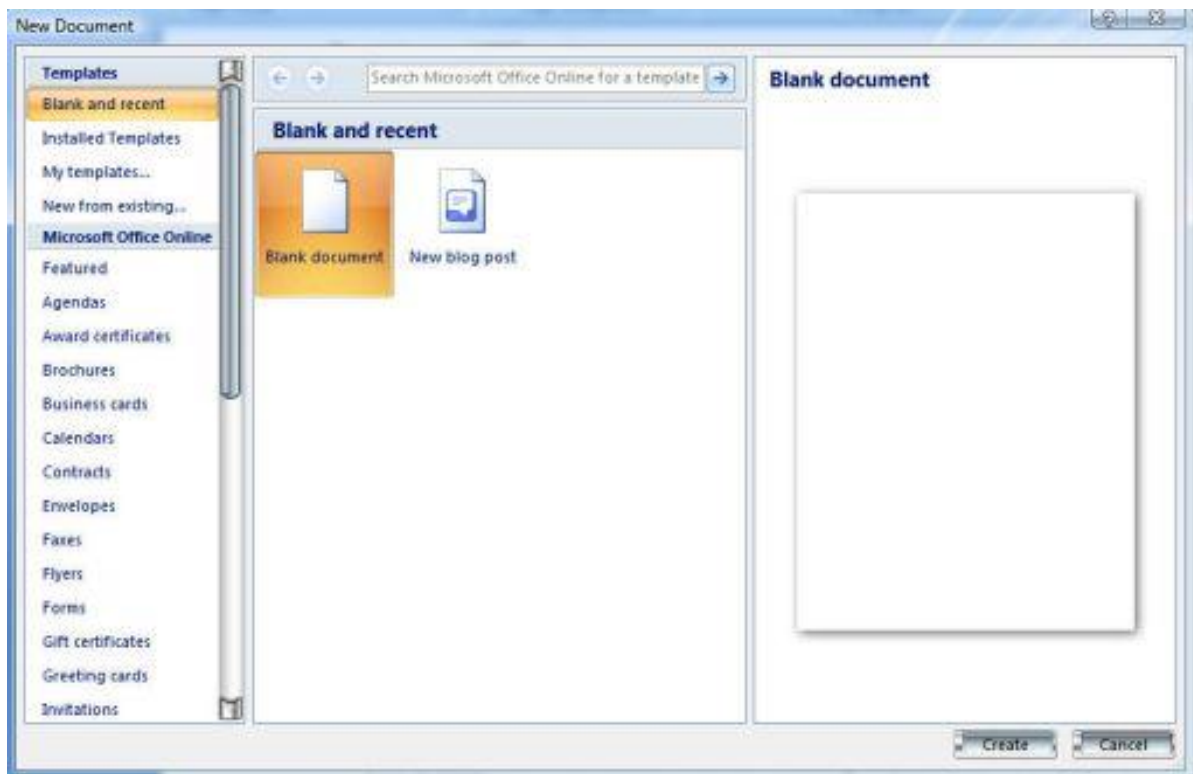
At the writing stage, your tools are words, sentences, paragraphs and layout. Make sure you convey your meaning concisely and courteously. The receiver of business correspondence wants to understand what should happen, why it should happen and how to go about making it happen.

The main purpose when writing in plain English is to get the message across.

Types of Documentation

The rule of "7 Cs"

Most businesses have standard formats for the layout and style of the documents they produce. These are called 'templates'.



When writing Business Correspondence we generally consider the rule of the “7 Cs”. This means that all of your work should be:

- Clear - able to be understood in one reading by the recipient (time = money)
- Concise - conveying what has to be stated with a minimum of words, sentences and paragraphs
- Complete - all of the information necessary to understand the correspondence is passed on
- Correct - all of the information conveyed is accurate.
- Courteous - your tone is always polite as you are representing your organization and wish to create goodwill
- Clean - this means that there are no coffee stains, liquid paper, or crossing out on your correspondence. It also means that your work is not cluttered and there is plenty of white space so that the document looks appealing and professional
- Checked - this means your work has been examined for spelling mistakes, grammatical mistakes, format and layout and found to be mistake-free.

Omit unnecessary words

Too wordy	Better option
As of now	Now
At a price of \$20	\$20
We can supply them in the following colours: blue, green and yellow	We can supply them in blue, green and yellow
We seldom ever make this mistake	We seldom make this mistake
In my personal opinion	In my opinion
In the event that	If
During the month of April	During April
For the reason that	Because
During which time	While
We are of the opinion	We believe
At the present time	Now
In the majority of instances	Mostly
According to our records	We find
On a regular basis	Regularly
He is sorry for	He regrets

Too wordy	Better option
He has no confidence in	He doubts
She is in accord with	She agrees
In the near future	Soon



Background Notes

Punctuation Marks serve to indicate the structure and organisation of writing, as well as intonation and pauses to be observed when reading it aloud

.	FULL STOP	Commonly placed at the end of several different types of sentences in English and many other languages.
,	COMMA	Used in many contexts, principally for separating things
:	COLON	A colon informs the reader that what follows proves, clarifies, explains, or simply enumerates elements of what is referred to before.
;	SEMICOLON	The mark to separate words opposed in meaning and to mark off interdependent statements.
‘	SINGLE QUOTATION MARK	Used in pairs to set off speech, a quotation, a phrase or a word. Also known as inverted comma.
“ ”	DOUBLE QUOTATION MARK	Used in pairs to set off speech, a quotation, a phrase or a word. Also known as an inverted comma.
()	BRACKETS	To set apart or interject text within other text Four main types of brackets: Round brackets or parentheses: () Square brackets or box brackets: [] Curly brackets: { } Angle brackets: < >
!	EXCLAMATION MARK	It is usually used after an interjection or exclamation to indicate strong feelings or high volume, and generally marks the end of a sentence.
?	QUESTION MARK	Also known as an interrogation point, question point or query is a punctuation mark that replaces the full stop at the end of an interrogative sentence.

Source: Wikipedia Encyclopaedia

Various techniques

- Change page size and orientation
- Change page margins
- Add/delete columns
- Formatting including Alignment and line spacing, font size, indents, font colours, outside borders, bullets, numbering
- Copying, cutting and pasting
- Inserting page breaks and section breaks
- Inserting or changing headers and footers
- Inserting page numbers
- Adding styles
- Inserting and formatting tables
- Saving documents
- Inserting images and graphics/clip art
- Inserting smart art and shapes
- Check spelling and grammar
- Attaching documents
- Saving and naming documents
- Copying files/folders
- Setting up the correct printer.



Work project 2.2

The task for this section requires you to complete the following:

Type the attached letter on a page as it appears noting the following instructions:

- Use WordArt and clip art to create the letterhead of the attached letter
 - The web address is in Ariel point 11 size, the remainder of the letter is in Ariel 12 point
 - The list is to be numbered and indented appropriately
 - Insert a footer with your name on the right
 - Save the document to your USB as Thai Eco Tours_name_date.
-



P.O. Box 7845
Bangkok 10400, Thailand
www.thai_ecotours.com
Tel: +66 72 123 456

20 December, 2012

Mrs. Birgitta March
William Angliss Institute of TAFE
555 La Trobe Street
Melbourne, Vic. 3000
Australia

Dear Mrs. March,

We are pleased to advise your trip details for your upcoming eco tour in Thailand. Your itinerary is as follows:

Day 1-3: Bangkok
Day 4-7: Chiang Mai to hilltribe (trek)
Day 8-12: Khao Sok & Chieow Laan Lake (jungle safari)
Day 13-16: Phuket (beach holiday)
Day 17: International flight

As our enclosed brochure outlines, the eco trip we propose includes all meals, overnight stays in eco lodges, transport and local guide. The total price is \$2,000.

If you require further information, please do not hesitate to call me on the above number or email me on yochit@thai_ecotours.com.

We look forward to hearing from you.

Yours sincerely,

Yochit Rinjan
Travel Manager

* Enclosed: travel brochure

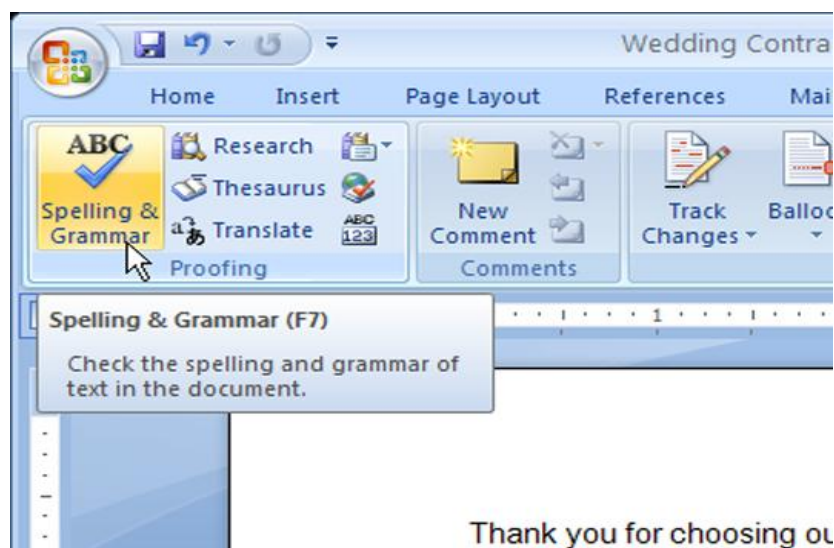
2.3 Check information for accuracy prior to sending

Introduction

The first thing you must do when you have completed your draft document is to do a spell check. However, beware that spell checkers are not totally accurate. You may need a dictionary (see element 2.1). You will need to add new words when you are sure you have spelled them correctly.

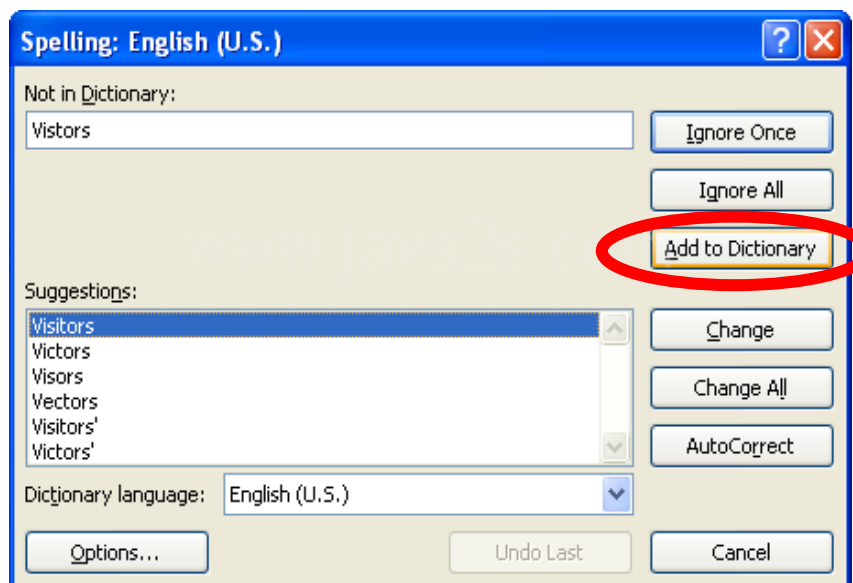
Running a spell check

Step 1: On the Review tab, click the Spelling & Grammar button.



Step 2: choose correct word

Step 3: add new word to your dictionary, where appropriate



How to fold an envelope

DL Envelope

110mm x 220mm - standard, business sized envelope. Designed to fit 1/3 of an A4 sheet.(Post Office Preferred.) Fold the letter twice so that it is creased to make thirds. This will fit easily in a standard envelope, and it is easy to unfold.

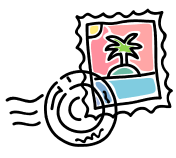
The **address** of the recipient is in the middle of the envelope, beginning approximately halfway down. (Be sure it is mostly below the stamp, or it may get covered over by the cancellation.)

The **return address** is in the upper left-hand corner. This is not necessary to type in if the stationery is pre-printed with the return address.

If you are using business envelopes with a window, fold the letter so that the inside address shows through the window.

Some correspondents include an **attention line** near the lower left corner for routing purposes. This is normally part of the main address unless space is a factor. It may be a department or a person's name. For example: Attn. : returns dept.

To type an envelope in Microsoft Word, go to 'mailings' tab, 'create envelope', then enter the delivery address and return address details.

Full name		
Return address 1		
Return address 2		
	Company name (if applicable)	
	Attn.: name/department	
	Recipient address 1	
	Recipient address 2	
	Postcode	<div style="display: flex; justify-content: space-around;"> <div style="border: 1px solid black; width: 20px; height: 30px;"></div> <div style="border: 1px solid black; width: 20px; height: 30px;"></div> <div style="border: 1px solid black; width: 20px; height: 30px;"></div> <div style="border: 1px solid black; width: 20px; height: 30px;"></div> </div>

How to fold a standard letter

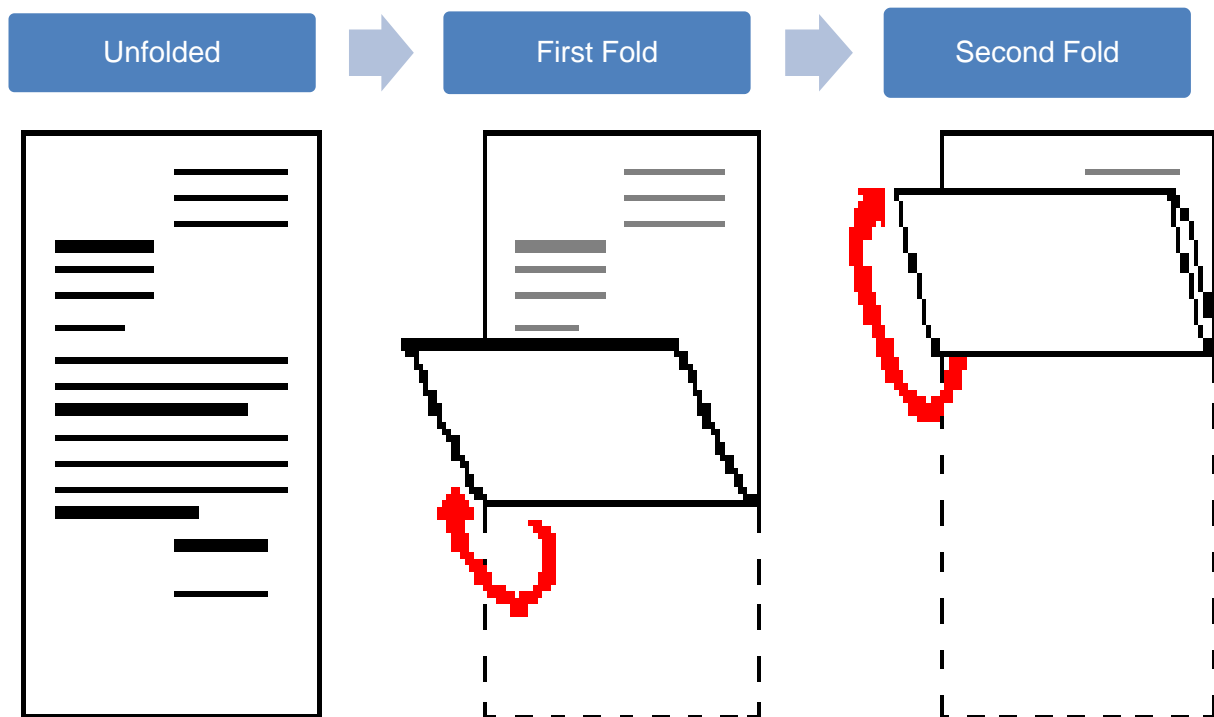
A business letter is folded twice into horizontal thirds and placed into an envelope.

This insures a little privacy in the letter. The letter is also easy to unfold after opening the envelope.

The following diagram shows how a letter is normally folded. This type of fold is used regardless of letter style:

1. Begin with the first page of the letter facing towards you.
2. Crease the letter along a fold one-third from the bottom. Fold the letter up to a point one-third from the top, covering the writing on the letter.
3. Make a second horizontal crease one-third from the top of the letter where the bottom of the letter had been folded to.
4. Tuck the bottom into this crease and fold the top over it. The letter will be folded into thirds. It will fit any standard envelope.

If the letter needs to have the address face out an envelope window, make the second fold in the same location but opposite direction. The letter will then be folded in a Z shape and the address can be positioned to face out the window of the envelope.



Work Project 2.3

It is a requirement of this Unit that you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

You are the owner of a charter bus company, VLines, in 3345 Truong Street, Vientiane, Laos. Due to the recent global economic downturn, internal tourism numbers have dropped by 50%.

- Write a memo advising all staff of an upcoming meeting to discuss repercussions of this downturn
- Write a letter to your coach captains advising them of the meeting on July 1, 2012 at 2 pm in your office. Firstly consider the type of letter (routine letter, good news letter, bad news letter). Secondly, ensure you follow the correct steps. Explain why you have chosen this type of letter
- Type out an envelope using the 'mailings' tab.

Spelling, grammar and sentence construction must be correct. Ensure that there is sufficient information in the document so that all the recipients understand what will be expected of them in terms of attendance.

Summary

Draft correspondence

In this section (Element 2), you have learned the different types of correspondence you may be using in a hospitality environment.

When drafting correspondence, it is important to determine who your audience is and to have a clear objective. Plan your paragraphs, research and follow the basic steps of collating, writing, editing and presenting. Draft your document into three clear sections: introduction, body and summary.

You have also learned the main difference between a memo and letter and discussed various styles of letters.

Remember the 7 C's rule.

Remember to use the various techniques to edit a document as per the class demonstration and work project. And finally, always remember to run a spell check and add new words to your dictionary.

In the next section (Element 3), you will learn how to maintain document systems.

Element 3: Maintain document systems

3.1 File/store documents in accordance with enterprise procedures

Introduction

It is important that you learn to file/store your documents either electronically or in hard copy according to the organisation's guidelines.



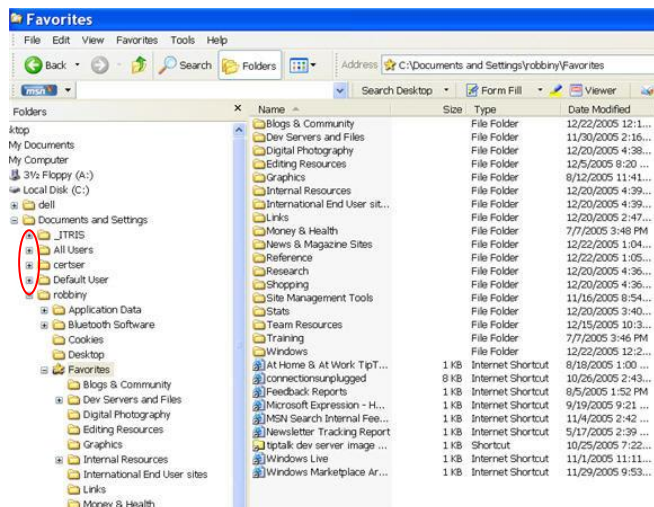
Storage of data

Most data is stored on a computer's hard drive. It is important to understand a computer's file management system in order to save work in the right place. Data is stored in folders (or directories) and sub-folders (or sub-directories), similar to a paper-based filing cabinet.

Below are examples of how Microsoft Windows Explorer organises its directory:

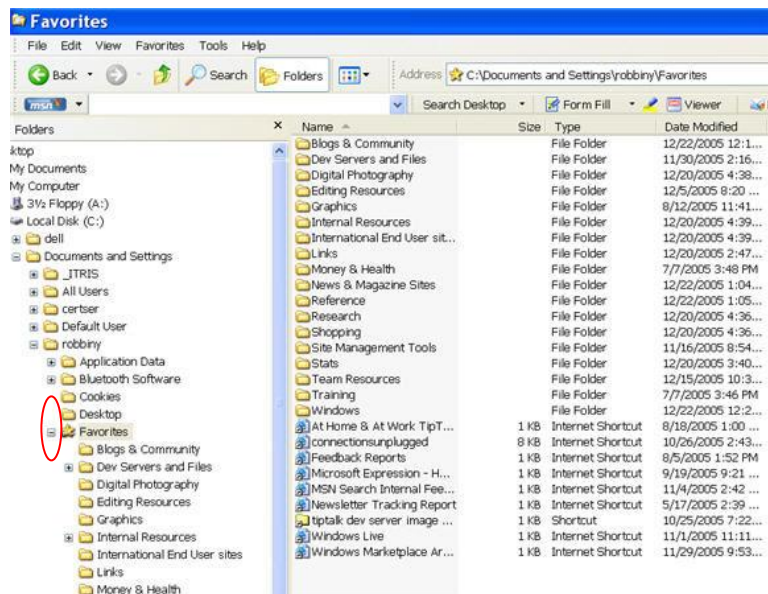
This is a section of Windows Explorer showing how the files are organised into a multi-level filing system.

The "+" signs to the left of some folders indicates that there are further sub-folders located in these folders.



By clicking on a folder with a “+” sign to its left, all the sub-folders within that folder can be seen.

A “-” sign to the left of a folder indicates that all sub-folders are showing (as per the favourite’s example).



Other than on the hard drive, data may also be stored on:

- USB memory sticks
- External hard drives: important in case of computer failure to safeguard large amounts of information
- Floppy disks or CD Roms: remember that a limited amount of information can be stored here, so it is a good idea to compress the file to accommodate large amounts of data. They are becoming obsolete, in favour of the above.



3.2 Modify and/or update records management systems in accordance with enterprise procedures

Introduction

Traditionally, companies have been focused on updating their physical records. However, increasingly, they need to focus on updating and standardising their electronic information. It is important to take the time and get the resources to get this right, in accordance with industry and enterprise practices.

Various filing techniques

Organisation of information

The most common types of classification for records and information are alphabetic, numeric, alpha-numeric, geographic, subject, keyword and chronological

Alphabetical

The most commonly used method of filing, the alphabetical system, places files in alphabetical order according to the customer or business name e.g. the telephone book. There are a number of rules to remember when using the alphabetic system.

- Disregard 'joining' words and titles such as "and", "the", "&", "Mr", "Sir", "Dr", "Miss" etc
- Hyphenated or compound names are treated as one word e.g. Jones-Smythe and van der Lynden are both indexed as one word
- Initials come before names (in filing 'nothing comes before something'), e.g. B. Thompson would be filed ahead of Brian Thompson
- Company names are treated in the order they are written, except if they contain a family name e.g. both Grace Bros and Robert E. Grace & Sons are filed under 'Grace', but Robert & Hickey would be filed under 'Robert'
- Abbreviations are treated as if the word was written in full
- St. is indexed as Saint, Ltd. as Limited. This means that St. and Saint entries are treated as if spelt the same way, as are Mac and Mc
- Numbers which are part of a business or company name are regarded as though spelled e.g. 24-7 is indexed as twenty-four seven.

Numerical

Each file or piece of information is filed in number order, from lowest to highest, according to the number on the document (for example, invoice number) or the customer number.

Geographical

Information is indexed alphabetically according to geographical location. States/Provinces are indexed first, followed by the city, town or suburb, then other appropriate information e.g. customer name.

Subject

Records are sorted according to the subject matter and filed alphabetically. This allows information on the one topic, or subject, to be easily located.

Key word

A particular word is used as the subject classification and specific descriptors are also allocated to further classify the information. Keyword systems are usually used in large organisations where the keywords are specifically designated.

Chronological

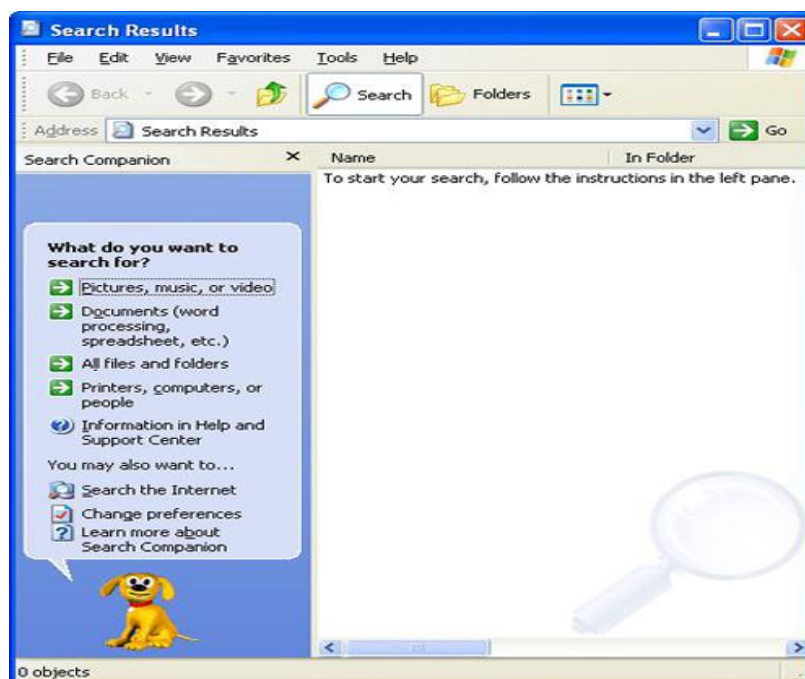
Chronological filing is used in conjunction with other filing methods and involves sorting records according to their date. In a client file for example, correspondence would be filed with most recent on top. Copies of Purchase Orders would be filed with the most recently sent order on top.

Retrieving documents

Documents can be opened from a software program (e.g. Word) or a file management program (e.g. Windows Explorer).

If a document cannot be found, it is possible to follow these basic steps:

- go to Computer icon on your desktop OR go to “Start”
- “search”
- “all files and folders”
- Fill in the information that is known, as shown below.



Deleting temporary files

Temporary files are backup files that are automatically created by the computer in case a document is lost.

Temporary files can be found on the C drive in the following 3 locations:

- C:\Temp
- C:\Windows\Temp
- C:\Windows\Temporay internet files.

To delete these files:

- Open Windows Explorer and go to the specified drive and folder e.g. C:\Temp
- Click on a file on the right of the screen and press Ctrl A (select all). Click on the delete button or press the Delete key, and click on Yes. If you receive any further messages about files, click on No.
- Repeat the above steps for each of the temp folders listed above.

Emptying the Recycle Bin

- Double click on the Recycle Bin icon on the desktop (or select recycle bin from within Windows Explorer.)
- Choose [File] Empty Recycle Bin, then click on Yes.
- Close the Recycle Bin.

What to Do if Things Don't Work

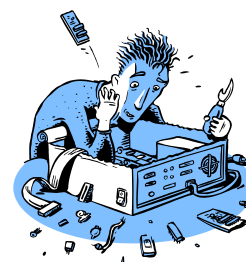
Are all the leads connected properly? Check the following:

- Power lead
- Monitor lead
- Mouse connection
- Hard drive connections.

Make sure that the computer is turned off first!

What if it freezes?

- Don't keep clicking
- Don't hit it
- Do wait for a few moments to see if it catches up with your flying fingers.
- If not – then hit Alt+Ctrl+Del. Or the restart button (but only as a last resort.)
- This will re-boot the system for you, but you'll probably lose any information you had not saved
- That's why you should be constantly saving your work as you go along.





Background Notes

Forms of paper based storage

Filing cabinets	3-drawer, 4-drawer, 2-drawer
Flat boxes	Flat box file, horizontal plan file
Lever arches	Binder
Suspension folders	Hanging files
Shelving	Lateral cabinets, compactus
Other	Trolley, spike file, rotary file, concertina file

Forms of electronic storage

Database	For example, using Microsoft Access or Works
Computer files	For example, using Microsoft Word or Excel files on hard or floppy disk
Email	For example Hotmail or Yahoo

Work Project 3.1-3.2

It is a requirement of this Unit that you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

- Save all work projects in a newly created folder "Work projects". Label them according to their number ie work project 1.1-1.3, work project 2.1, work project 2.2, work project 2.3, work project 3.1-3.2
- Save all answers to the written questions in a newly created folder "Answers_first name_last name". File them as per the filing techniques in element 3.2 and explain why you have chosen this style of filing
- Compose a new message to your trainer, using Outlook Express and attach both folders.

Summary

Maintain document systems

In this section (Element 3), you have learned how to file and store documents in accordance with enterprise procedures and guidelines in order to save work in the right place.

Companies streamline their filing systems in order to manage their ever growing amount of data effectively and to make their processes/policies as user-friendly as possible. In this way, every employee can find files easily. However, you have learned to search for a document where you cannot locate a file or folder.

It is important to know how to delete files, empty your recycling bin on a regular basis or in accordance with enterprise procedures.

Presentation of written work

1. Introduction

It is important for students to present carefully prepared written work. Written presentation in industry must be professional in appearance and accurate in content. If students develop good writing skills whilst studying, they are able to easily transfer those skills to the workplace.

2. Style



Students should write in a style that is simple and concise. Short sentences and paragraphs are easier to read and understand. It helps to write a plan and at least one draft of the written work so that the final product will be well organized. The points presented will then follow a logical sequence and be relevant. Students should frequently refer to the question asked, to keep 'on track'. Teachers recognize and are critical of work that does not answer the question, or is 'padded' with irrelevant material. In summary, remember to:

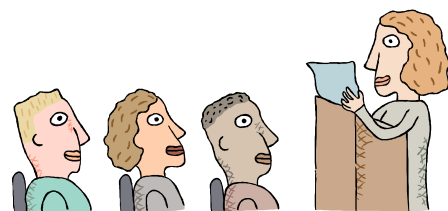
- Plan ahead
- Be clear and concise
- Answer the question
- Proofread the final draft.

3. Presenting Written Work

Types of written work

Students may be asked to write:

- Short and long reports
- Essays
- Records of interviews
- Questionnaires
- Business letters
- Resumes.



Format

All written work should be presented on A4 paper, single-sided with a left-hand margin. If work is word-processed, one-and-a-half or double spacing should be used. Handwritten work must be legible and should also be well spaced to allow for ease of reading. New paragraphs should not be indented but should be separated by a space. Pages must be numbered. If headings are also to be numbered, students should use a logical and sequential system of numbering.

Cover Sheet

All written work should be submitted with a cover sheet stapled to the front that contains:

- The student's name and student number
- The name of the class/unit
- The due date of the work
- The title of the work
- The teacher's name
- A signed declaration that the work does not involve plagiarism.

Keeping a Copy

Students must keep a copy of the written work in case it is lost. This rarely happens but it can be disastrous if a copy has not been kept.

Inclusive language

This means language that includes every section of the population. For instance, if a student were to write 'A nurse is responsible for the patients in her care at all times' it would be implying that all nurses are female and would be excluding male nurses.

Examples of appropriate language are shown on the right:

Mankind	Humankind
Barman/maid	Bar attendant
Host/hostess	Host
Waiter/waitress	Waiter or waiting staff

Recommended reading

- <http://www.java2s.com/Tutorial/Microsoft-Office-Word-2007/CatalogMicrosoft-Office-Word-2007.htm>

Trainee evaluation sheet

Perform clerical procedures

The following statements are about the competency you have just completed.

Please tick the appropriate box	Agree	Don't Know	Do Not Agree	Does Not Apply
There was too much in this competency to cover without rushing.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Most of the competency seemed relevant to me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The competency was at the right level for me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I got enough help from my trainer.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The amount of activities was sufficient.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The competency allowed me to use my own initiative.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My training was well-organized.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My trainer had time to answer my questions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I understood how I was going to be assessed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I was given enough time to practice.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My trainer feedback was useful.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enough equipment was available and it worked well.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The activities were too hard for me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The best things about this unit were:

The worst things about this unit were:

The things you should change in this unit are:
