

BSBITU313

Design and produce text documents



Housekeeping

- Emergency procedures
- Mobiles and security issues
- Break times and smoking policy
- This course is interactive – ask questions
- Practise respect and confidentiality
- Ground rules.



Objectives

- ***Discover*** how to prepare to produce word processed documents
- ***Know*** how to design word processed documents
- ***Learn*** how to add tables and other data
- ***Understand*** how to produce text documents
- ***Gain*** the skills and knowledge required for this unit



Prepare to produce word processed documents

1.1 Use safe work practices to ensure *ergonomic, work organisation, energy and resource conservation requirements* are met



Using safe work practices

- When your task is to design and produce text documents, you need to consider how you can safely work at your computer for long periods of time
- When working at a computer for long periods of time, believe it or not, there is opportunity for injury
- There are many injuries you can sustain from working at a computer, including:
 - Repetitive strain injury
 - Eye strain and discomfort
 - Back problems.



Ergonomic requirements

- Related to improving visibility/accessibility whilst keeping stress and mental fatigue at a minimum
- Ergonomic requirements may include:
 - Avoiding radiation from computer screens
 - Chair height, seat and back adjustment
 - Document holder, footrest and posture
 - Keyboard and mouse position
 - Lighting and noise minimisation
 - Screen position, workstation height and layout.



Work organisation requirements

- Prolonged, static postures will take their toll on body
- Need to address work organisation strategies in order to avoid injury when working at your computer for long periods of time
- Work organisation strategies may include:
 - Exercise breaks
 - Mix of repetitive and other activities
 - Rest periods.



Energy and resource conservation requirements

- Use energy/resource conservation techniques
- Keeps bills down and helps to protect non-renewable resources
- Consider:
 - Double-sided paper use
 - Recycling used and shredded paper
 - Re-using paper for rough drafts (observing confidentiality requirements)
 - Utilising power-save options for equipment.



Activity 1A



Prepare to produce word processed documents

1.2 Identify *document* purpose, audience and presentation requirements, and clarify with relevant personnel as required



Types of documents

Documents may include:

- Brochures and calendars
- Faxes and flyers
- Forms and memos
- Mail merge documents, including labels
- Multi-page letters
- Promotional material
- Reports and schedules
- Tables.



Purpose, audience and presentation requirements

- You should identify the purpose, audience and presentation requirements of your document
- When looking at the purposes of documents, there are four general categories:
 - To give instructions
 - To persuade the reader
 - To provide information
 - To prohibit something.



Example: flyers

- Cheap way to get information out to large number of people
- The purpose is to offer small amount of information at a low cost, for a limited amount of time
- The audience will often depend on the purpose
- In turn, the presentation requirements of the flyer will often depend on the purpose and the audience.



Activity 1B



Prepare to produce word processed documents

1.3 Identify *organisational* and task *requirements* for text-based business documents to ensure consistency of style and image



Organisational requirements

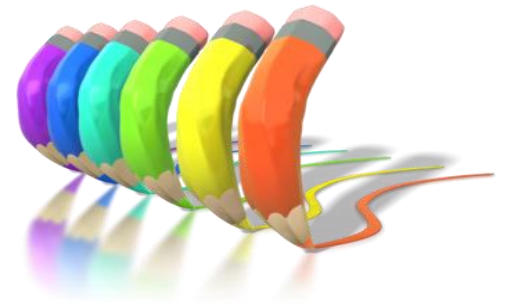
- When preparing to produce a text document, you should identify any organisational and task requirements that are related to your project
- In order to comply to company image and ensure consistency
- Every document you produce should have same 'feel'
- Organisational requirements will apply to all of the document types that were discussed in the previous chapter.



Examples of organisational requirements

Organisational requirements may include:

- Company colour scheme and company logo
- Consistent corporate image and content restrictions
- Established guidelines and procedures for document production
- House styles and templates
- Observing copyright legislation
- Organisation name, time, date, document title, filename, etc. in header/footer.



Templates

- Within organisations, there will be templates to use as a starting point when producing text documents
- Can ensure that all documents have same properties
- Consider using the existing templates
- If there isn't one or they don't suit your needs, then think about developing one
- It will save you time will make sure that all of your documents are consistent in style.



Activity 1C



Design word processed documents

2.1 *Design* document ***structure and layout*** to suit purpose, audience and information requirements of task



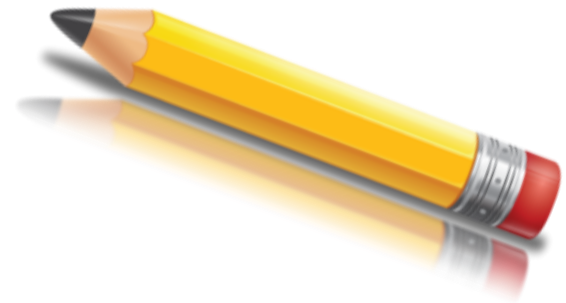
Designing structure and layout

- Structure and layout of document should be designed in a way that suits its purpose, audience and information requirements
- May vary depending on type of document
- Design may include:
 - Balance and diversity
 - Relative positioning of graphics and headings
 - Simplicity and text flow
 - Typography.



Structure and layout

- Boxes
- Colour and columns
- Drawing and graphics
- Headings
- Letter and memo conventions
- Page layout
- Photographs
- Typeface and white space.



Example standard document

- Although it won't apply to every type of document, it's a good place to start
- What is included?
 - Title page
 - Contents table
 - Introduction
 - Body text
 - Appendices and annexes.



Activity 2A



Design word processed documents

2.2 Design document to enhance readability and appearance, and to meet organisational and task requirements for style and layout



Different layouts and styles

Different layouts and styles to consider include:

- Paper size and page orientation
- Text font, colour and size
- Headings and paragraphs
- Margins and page breaks
- Headings and footers
- Justification, spacing and tables
- Page numbering and language
- Underlining, italics and bold.



Enhancing readability and appearance

- When designing and producing a text-based business document, it is essential to select the correct layout and style; you need to ensure that it is readable and fit-for-purpose
- For example:
 - Text size is usually size 12
 - Line spacing is usually 1.0 or 1.15
 - Margin size is usually 2.54cm.



Meeting organisational and task requirements

- Document should be designed in a way that meets any relevant organisational and task requirements with regards to style and layout
- Is there a style that you should use?
- Is there a template available?
- Have you considered relevant copyright legislation?
- Have included the company's colour scheme or logo?



Activity 2B



Design word processed documents

2.3 Use style sheets and *automatic functions* to ensure *consistency of design and layout*



Consistency of design and layout

- Every document should have same 'feel'
- Consistency with everything
- Include company logo and colour scheme
- Reflect professionalism
- Consistency of design and layout may include:
 - Annotated references and borders
 - Bullet/number lists
 - Page numbers and spacing.



Style sheets

- Also known as templates
- Allow you to store and apply specific formatting
- File or form that defines layout of document
- Very useful
- Exist within many different programs
- Within a style sheet you can specify things like:
 - Page size and margins
 - Spacing
 - Text font and colour.



Automatic functions

- Allow consistency in design and layout
- May include:
 - Auto correct and auto date
 - Auto format and auto text
 - Default settings
 - Headers and footers
 - Page numbering and styles
 - Table headings.



Activity 2C



Add tables and other data

3.1 Insert a standard table into a document, changing cells to meet information requirements



Inserting tables

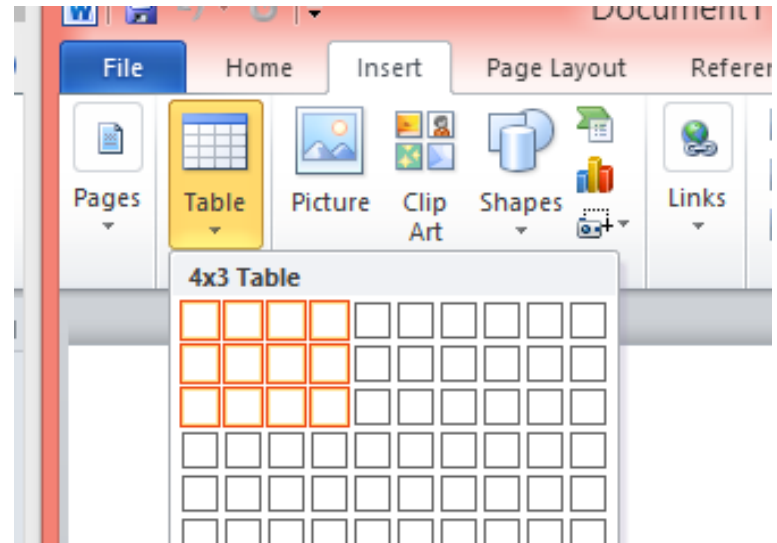
- There are many ways to insert tables into a Microsoft Word document
- This chapter looks at:
 - Examples of the ways to insert tables
 - How to insert text into a table
 - How to insert images into a table
 - How to change the cells within a table.

Sample	Sample	Sample
Sample	Sample	Sample
Sample	Sample	Sample

Method one

Follow these steps:

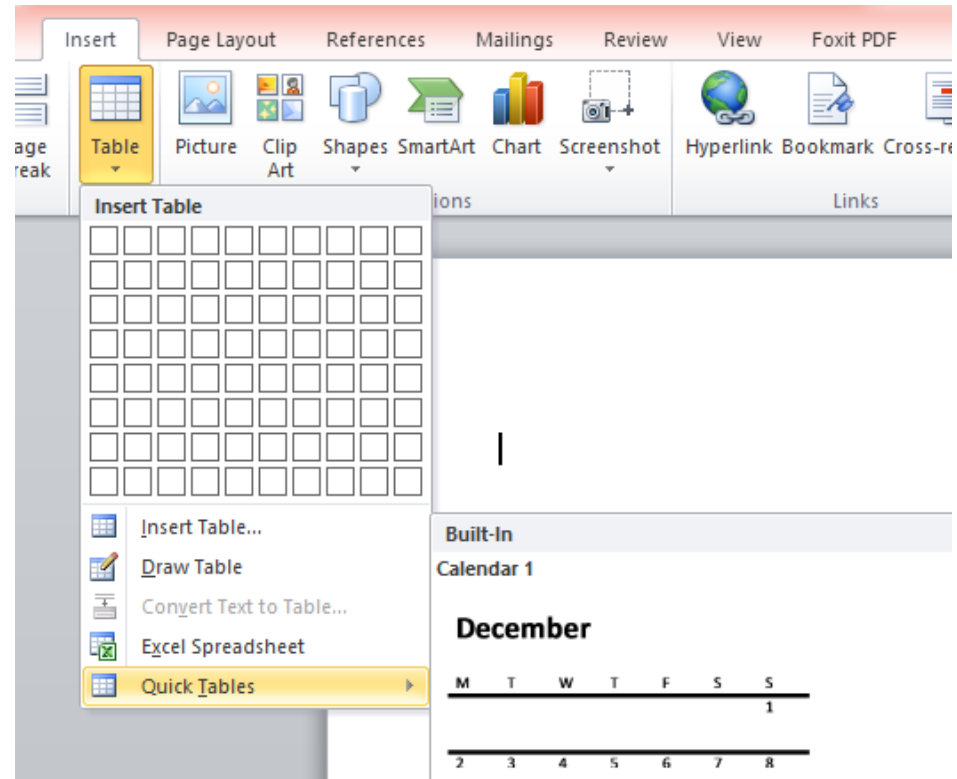
- Click the place in your document where you want the table inserting
- Click the 'Insert' tab
- Click the 'Table' tab
- Using your cursor, highlight the size of the table that you wish to insert
- Click there and the table will be inserted.



Method two

Follow these steps:

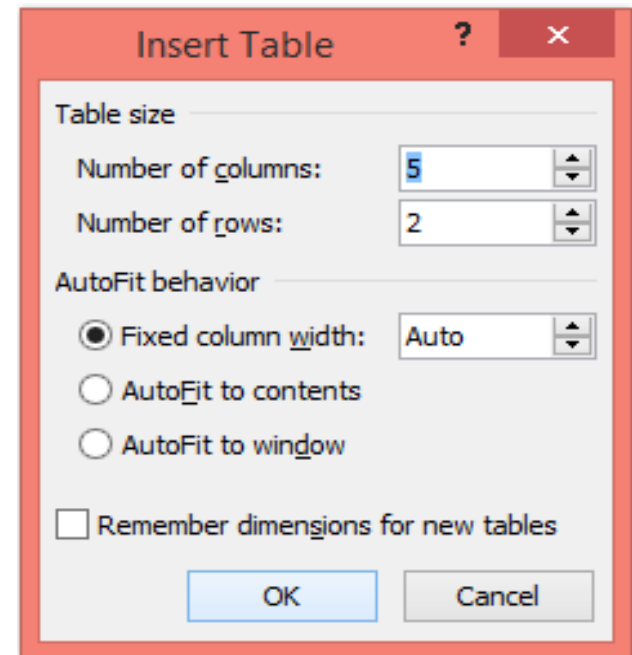
- Click document where you want your table
- Click the 'Insert' tab
- Click the 'Table' tab
- Click 'Quick Tables'
- Choose which table you wish to insert from the drop down list.



Method three

Follow these steps:

- Click your document where you want the table
- Click the 'Insert' tab
- Click the 'Table' tab
- Choose 'Insert Table'
- In the window that appears specify the options of your table
- Click 'OK'.



Activity 1A



Add tables and other data

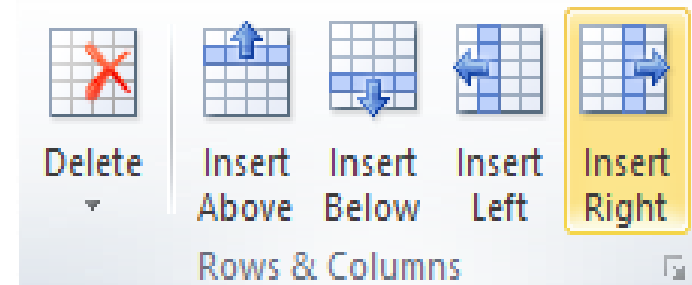
3.2 Insert and delete columns and rows as necessary



Inserting columns

Follow these steps:

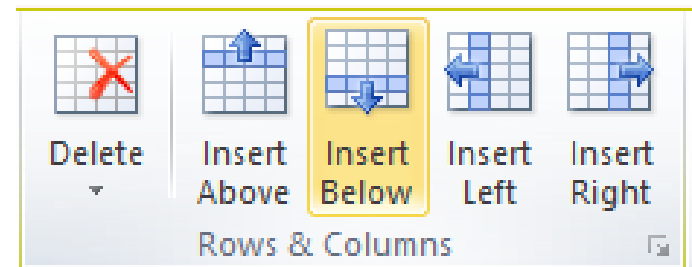
1. Highlight the column to the left or right of where you want your new column to appear
2. Click 'Layout' within your 'Table Tools' tab
3. In the 'Rows & Columns' section, click 'Insert Left' or 'Insert Right'.



Inserting rows

Follow these steps:

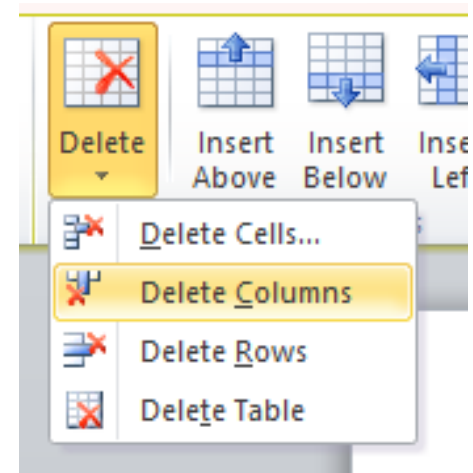
1. Highlight the row above or below where you want your new row to appear
2. Click 'Layout' within your 'Table Tools' tab
3. In the 'Row & Columns' section, click 'Insert Above' or 'Insert Below'.



Deleting columns and rows

Follow these steps:

1. Click the 'Layout' tab under 'Table Tools'
2. Highlight the row or column that you wish to delete
3. In the 'Rows & Columns' section, click 'Delete'
4. Choose either 'Delete Columns' or 'Delete Rows'.



Activity 1B



Add tables and other data

3.3 Insert images and other ***data*** to meet required specifications



Inserting images: method one

➤ 'Copying and pasting'

➤ Follow these steps:

- Once you have located the image you wish to insert, right click the image
- Select 'Copy' or 'Copy Image' or select the image and press Ctrl and C together
- Click where you want to insert your image
- Right click and select 'Paste' or press Ctrl and V together.

1



Inserting images: method two

- 'Insert' feature
- Follow these steps:
 - Click where you want to insert image
 - Click the 'Insert' tab and click 'Picture'
 - Browse for the required image
 - Select your chosen image
 - Click 'Insert'.



Inserting images: method three

- 'Clicking and dragging'.
- Follow these steps:
 - Find the image that you need
 - Click and drag the image over to your Word document
 - Release the mouse when you have positioned your cursor in the correct place.



Inserting other data

Data may include:

- Clip art
- Data from other software applications
- Digital photographs
- Files
- Graphics
- Quotes and references
- Scanned photographs and logos
- Tables, graphs and charts.



Activity 3C



Produce text documents

4.1 Use *advanced software functions* to enable efficient production of documents



Advanced software functions

- Your priority should be to ensure the readers can understand the information
- In order to ensure efficient production of your documents, you will need to use the range of advanced software functions that are available
- Only apply the ones that apply to the particular document that you are creating
- Don't over-design.



Examples of advanced software functions

- Alternate headers and footers
- Drawing and graphics tools
- Importing data/objects/pictures
- Mail merge
- Newspaper columns
- Sections
- Sort
- Styles and tables
- Templates.



Example: newspaper columns

Follow these steps:

- Highlight the text that you wish to put into columns
- Click the 'Page Layout' tab
- Click the 'Columns' button
- Select how many columns you wish to apply
- Extra options can be found in 'More Columns'.

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Activity 4A



Produce text documents

4.2 Enter or import, and edit text and other data to meet required specifications



Entering and importing text

You can:

- Simply type the text that you require
- Add text to 'AutoText' gallery to use over and over
- Change the 'AutoCorrect' settings and add text entries that you will be using often
- Use data from an external source
- Import external data using the Mail Merge feature
- Import other files without using a connection.



Editing text

- Once you have entered or imported the required text into your document, you may need to edit it in order to meet your organisational requirements and specifications
- This may involve changing things like the:
 - Size and colour of the text
 - Font and alignment of the text
- You may also want to add headings and sub-headings or format some of your text into columns.



Entering, importing and editing other data

- You may need to enter, import and edit other types of data
- For example, you may need to include:
 - Watermarks, images and clip art
 - Data from other software applications
 - Files, graphics, quotes and references
 - Digital photos and scanned photographs and logos
 - Tables, graphs and charts.



Activity 4B



Produce text documents

4.3 Preview, adjust and ***print*** documents in accordance with organisational and task requirements



Preview and adjust documents

- To preview a Microsoft Word document:
 - Click the 'File' tab
 - Click the 'Print' option
 - Your preview will appear
- Ensure document is in accordance with organisational/task requirements
- If necessary, amendments should be made
- Once amendments are completed, reviewed and previewed, it is time to print.



Print documents

- The printing should also be in accordance with organisational /task requirements
- Printing may include:
 - Print merge
 - Print to file
 - With comments
 - With drawing objects
 - With field codes
 - With hidden text.



Activity 4C



Produce text documents

4.4 *Name and store* text documents, in accordance with organisational requirements and exit application without information loss/damage



Naming and storing documents

Naming and storing documents may include:

- Authorised access
- File names according to organisational procedure
- File names which are easily identifiable
- Filing locations
- Security/password protection
- Storage on hard/floppy disk drives, CD-ROM, tape back-up.



Naming documents

Tips when naming your documents include:

- Use keywords and dates
- Use your name or initials
- Use alphabetic codes
- Use version numbers
- Use descriptors
- Use underscores
- Use common names
- Be detailed and consistent.



Storing documents

Tips when storing your documents include:

- Store similar documents together
- Don't save unnecessary documents
- Avoid large folder structures
- Use shortcuts rather than having multiple copies
- Colour code your folders
- Think about storing documents online.



Exiting without information loss or damage

- Remember to save often
- Minimise chance of information being lost or damaged
- To save a document, either:
 - Press Ctrl and S together
 - Click the 'File' tab and click 'Save' or 'Save as'
 - Click the save icon across the top of your document (see image).
- Once you know that you have saved your document, you can then close it.



Activity 4D



Produce text documents

4.5 Prepare text documents within ***designated timelines*** and organisational requirements for speed and accuracy



Timelines

- Where key planned events and tasks are marked in the required sequence of their occurrence on a suitable scale
- Designated timelines may include:
 - Organisational timeline e.g. deadline requirements
 - Timeline agreed with internal/external client
 - Timeline agreed with supervisor/person requiring document.



Examples of timelines

Designated timelines may be:

- Within organisational deadline
- Within an agreed period
- By the end of the month
- Daily
- As requested.



Time management

- In order to keep to your designated timeline, it is beneficial to have good time management skills
- Good time management tips may include:
 - Recording your deadlines
 - Prioritising your tasks
 - Keeping track of your progress
 - Knowing how to deal with possible problems that may arise.



Activity 4E



Produce text documents

4.6 Use manuals, user documentation and online help to overcome problems with document design and production



Manuals

- Documents that intend to give assistance
- The things that a manual may include are:
 - A cover page, a title page and a copyright page
 - Frequently asked questions
 - Where to find further help, including contact details
 - Information on how to navigate through manual
 - A troubleshooting section and a glossary and/or index.



User documentation

- The information that is provided to help you use a particular program, including technical manuals and online information
- User documentation is often divided into categories, for example:
 - Installation
 - Reference
 - Tutorial.



Online help

- There is a wide range of help available online
- A simple search on the internet will provide you with almost anything that you need
- Online help is often topic-orientated and delivered through some form of computer software
- Most online help provides assistance and can present information surrounding a broad range of topics.



Activity 4F



Skills and Knowledge Activity



Major Activity

- This activity should take anywhere between 1-2 hours to complete and can be found at the end of your workbook.
- Your instructor will let you know whether they wish for you to complete it in session time or your own time.



Summary and Feedback

- Did we meet our objectives?
- How did you find this session?
- Any questions?



Congratulations!

You have now finished the unit...

‘Design and produce text documents’

