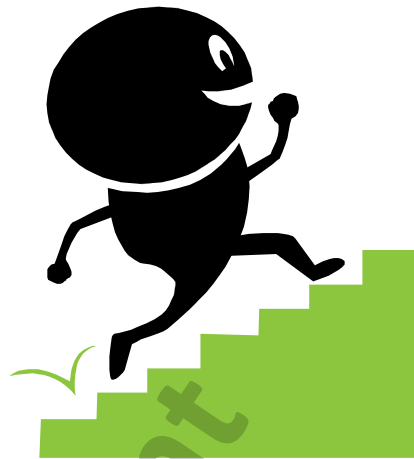


Easy Steps



Unit 24872 (V2)

**Produce documents for a workplace
using a computer**

with

Microsoft Word 2010

- ☒ Easy to follow
- ☒ Step-by-step instructions
- ☒ Covers Unit Standard Criteria

A Cheryl Price Publication

Unit Standard 24872 (Version 2)

Produce documents for a workplace using a computer – Word 2010

This book covers the course outline for the following New Zealand Qualifications Authority Unit Standard:

Unit Standard 24872 - GENERIC COMPUTING (Level 3, Credits 3)

Produce documents for a workplace using a computer (Version 2).

All topics in this Unit Standard are included in this book.

Retrievable exercise files are used with this book. These are available for free download from our web site at www.cherylprice.co.nz. Instructions for downloading are included on the next page.

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Cheryl Price
T.Dip.WP, T.Dip.T.

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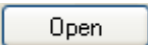




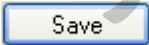
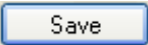
Web address:

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Published in New Zealand

Downloading Exercise Files

The exercise files listed on the following page can be downloaded from the Cheryl Price web site as follows:

1	In your web browser, type: www.cherylprice.co.nz
2	Press Enter on the keyboard to display the Cheryl Price website.
3	Click in the Product Search box and type the number of this unit standard, as shown at the right. <div data-bbox="1171 504 1465 680" data-label="Image"> </div>
4	Click on  Search
5	Click on US 24872
6	Under the Exercise Files heading click on the underlined blue hyperlink, ie Book Exercise Files – V2 Word 2010 Free Download The File Download dialog box will display.
7	If you have Winzip use the following instructions otherwise move to step 8.
	a Click on  Open .
	b Click on the  of the  Unzip button.
	c If My Documents folder is not displayed click on Set default unzip folder at the bottom of the list. Ensure My Documents is selected then click on Select Folder.
	d Click on the  of the  Unzip button and click on the My Documents folder. The files will be unzipped.
8	Click on  Save and ensure My Documents folder is displayed. Click on  Save
9	Click on Open Folder which will display My Documents folder. Right click on the zipped exercise file and select Extract All. Click on Extract. A folder will be created containing the exercise files.

Exercise Files used in this book

(Instructions are included on the previous page for downloading retrievable files from our web site at www.cherylprice.co.nz)

Names of files	
Balsoms Letterhead.	Mitchells2
Balsoms Policies	Mitchells3
Dinos	Mitchells4
FaxForm	Pacific Hotel House Style
Invoice Lindleys	Pacific Hotel Letterhead.
Invoice Sally's Soft Furnishings.	Pika's logo
Kamo Itinerary text	PizzaMenu
Kayak tour letter text	Stewart Island Touring Co letterhead
Landlord letter text	Stewart Island Touring Co memo
MemoForm	Voyage Travel Itinerary
Mitchells1	

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Unit Standard 24872 Version 2

Title	Produce documents for a workplace using a computer		
Level	3	Credits	3

Purpose	People credited with this unit standard are able to produce workplace documents using a computer; use email in a workplace to produce and send documents; and explain the advantages and disadvantages of using email in a workplace.
----------------	---

Classification	Computing > Generic Computing
-----------------------	-------------------------------

Available grade	Achieved
------------------------	----------

Explanatory notes

- 1 This standard is intended to be used for the assessment of candidates who have previous experience with computers and are able to use specific programs to produce documents relevant to a specified workplace context. It is expected that the assessment would specify the workplace context and the requirements for that workplace.
- 2 The vocabulary used within the document must be appropriate to the context of the specified workplace and the document produced.
- 3 Definitions
Workplace policies and procedures refer to both documented and oral instructions about workplace expectations; these must include but are not limited to – customer service delivery, legislation, organisational structure, business objectives.
Email etiquette is the commonly used conventions including but not limited to – writing concisely, use of capitals, use of cc and bcc, confidentiality.
- 4 Legislation relevant to this unit standard includes but is not limited to;
 Privacy Act 1993
 Unsolicited Electronic Messages Act 2007.
- 5 An assessment resource to support computing unit standards (levels 1 to 4) can be found on the NZQA website at <http://www.nzqa.govt.nz/providers/resources/index.html>.

Outcomes and evidence requirements

Outcome 1

Produce workplace documents using a computer.

Range documents may include but are not limited to – facsimile, invoice, itinerary, promotional material, rosters, letters.
Evidence is required for a minimum of four documents, two of which must be letters of at least two paragraphs.

Evidence requirements

- 1.1 The document is relevant to and consistent with the conventions of the context and situation.
 - 1.2 The document is produced in accordance with the workplace policies and procedures.
 - 1.3 The document is checked for correct spelling and grammar using spell check function set to New Zealand English.
 - 1.4 The document is manually checked for errors not picked up by spell check function.
 - 1.5 The document is saved according to workplace policies and procedures and is produced as a printed hard copy.
- Range may include but is not limited to – naming files, assigning to shared drive, setting printer preferences.

Outcome 2

Use email in a workplace to produce and send documents.

Evidence requirements

- 2.1 Email messages are sent, received, forwarded, and replied to in accordance with email etiquette and workplace policies and procedures.

Range may include but is not limited to – customer enquiries, bookings, business-to-business correspondence, inter-office correspondence.
Evidence is required for a minimum of three separate messages.
- 2.2 Message attachments are sent in accordance with email etiquette and workplace policies and procedures.

Range may include but is not limited to – forms, price lists, itineraries, inventories, quotations.
Evidence is required for a minimum of three separate email messages with a different attachment for each message.

Outcome 3

Explain the advantages and disadvantages of using email in a workplace.

Evidence requirements

- 3.1 Advantages and disadvantages of using email within a workplace are identified and compared with other types of communication.

Range may include but it is not limited to – oral, memo, letter, text message.

Planned review date	31 December 2013
----------------------------	------------------

Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	23 April 2008	31 December 2013
Rollover and Revision	2	18 February 2011	N/A

Section

1

Standard Formats Workplace Policies and Procedures Document Accuracy Saving and Naming Documents

Learning Outcomes

At the end of this section you should be able to -

- ☐ Recognise the importance of using standard formats and how they can be applied across document types
- ☐ Understand the significance of workplace policies and procedures and how these are applied to document creation
- ☐ Know where to find information on workplace policies and procedures
- ☐ Understand different workplace requirements for saving and naming documents

Producing Appropriate Documents

Every document has a purpose – some documents simply convey facts in an easy-to-read way (such as travel itineraries or work rosters), some collate information from many sources and present it in a cohesive and comprehensive way that a new audience can understand (eg reports), some request money (invoices), some try to attract the reader to buy or do something (promotional booklets and advertisements). Documents such as letters or facsimiles can have very varied content, but usually only communicate to one reader.

Document types that you may come across include:

- Business letters
- Inter-office memos
- Facsimiles
- Travel itineraries
- Promotional documents and advertisements
- Rosters (a schedule showing when and where staff are working)
- Emails
- Accounting documents, eg invoices, statements, spreadsheets, balance sheets
- Reports
- Meeting documents, eg agendas, minutes of meetings
- Legal documents, eg wills, agreements and contracts

For most documents there are basic business conventions that should be used when producing them. These conventions are dictated by the document's context and the situation, eg if a document is promoting something then use of colour, white space, different size text and a powerful, interesting, eye-catching layout are all very appropriate.

If the document is an invoice, it is important that the information is clear, orderly and makes it very obvious what the reader must do (ie pay x amount to y client); itineraries and rosters would be likely to use a tabular format so that the reader can easily find the information they need, eg final check-in times. Letters have the sender's and addressee's details prominently displayed at the top of the letter so that the reader knows who the letter is from and who it is addressed to.

You can see from this that if you produce an invoice that looks like a crazy promotional flyer, it is highly likely that it will go unpaid as it could be quickly misinterpreted as an advertisement for something and be thrown in the rubbish! At the very least, documents need to follow accepted business conventions (look and layout) to avoid confusion for the reader and so that the document type and purpose is easily recognised.



Therefore, knowing and following the accepted business conventions (rules) of how certain documents need to look is vital.

Standard Formats

Most organisations have a preference of how documents are to be formatted. This means that every document produced on behalf of a particular workplace will have a uniform look, regardless of who has produced, resulting in recognition of documents and the creation of an image/branding for that workplace.

Many companies produce a Style Manual or Policies & Procedures Manual, which contains sample documents, formats used and guidelines for producing documents. This can also include punctuation policies, letter endings, etc. These manuals can range from a short simple document to a large bound manual.

Workplace policies and procedures are covered further later in this workbook section.

Why do organisations use standard formats?

- If you follow a standard, pre-designed format, it is more likely that you will include all the required information. It is easy to forget to add important details when all you have in front of you is a blank piece of paper.
- Standard layouts become familiar to employees. People know exactly where to look for the piece of information they need, and might not need to read through the whole document to find out the particular detail they require.
- Standard formats tend to look neater and more professional.

The exact layout of the document will depend on what type of document you are preparing, eg letter, memo etc, and these are discussed separately later in this workbook.

The following examples give you an idea of formatting and presentation requirements used by two different workplaces.

Example 1 – Condition of Vehicle Reports by Memo

Jenny works for a truck rental company. She regularly has to send memos containing 'Condition of Vehicle' reports to her manager. These reports are used to record any bumps, scratches and other damage to trucks.

It is a rule at Jenny's company that all Condition of Vehicle reports must be written on specially printed company memo stationery, which has 'Condition of Vehicle Report' pre-printed in the subject line. This rule is useful because it means Jenny's manager instantly recognises the Condition of Vehicle reports. A report written on blank paper might be misfiled, overlooked or even accidentally thrown away.

Example 2 – Giving Information by Letter

Charlie works for a large printing company. He deals directly with potential customers who request quotes for their printing needs. Charlie always communicates by letter with customers as it is important that customers have a formal document on which their financial liability is detailed. He wouldn't want a customer to misunderstand what the quote covered and to complain after the printing had been completed.

Charlie uses pre-printed company letterhead. Charlie ensures that all the letters that he writes are smart, stylish and signed after careful checking, so that the customer will know that his is a professional printing company to work with.

Below and on the following few pages you will see how examples of document style/format requirements for a company have been used.

Notice the same company logo, colour scheme, templates, etc that have been used throughout the following website, letter, memo, fax and invoice.

Website



Business Letter



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For excellence in training resources

16 October 2014

Mrs Jane Cooke
8 Chester Avenue
Albany
Auckland 0632

Dear Mrs Cooke

Thank you for your telephone enquiry this morning regarding our computer books.

Our Easy Way books for computer programs, eg Microsoft Word, Excel, Access include step-by-step instructions so you can teach yourself these programs. They are divided into levels, eg Microsoft Word has Levels 1, 2 and 3 with Level 1 used for a complete beginner through to Level 3 which is much more advanced.

The Learning Series books combine three levels into one book.

I am enclosing a sample booklet that will show you how our books are structured and how easy it is for you to learn the computer programs that you mentioned, ie Word and Excel.

Please contact me again if I can assist you further.

Yours sincerely

Cheryl Price
Director

Enc

Inter-office Memorandum



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Memorandum

TO: All Staff
FROM: Jennifer, Anderson, Office Manager
DATE: 23 October 2014
SUBJECT: Staff Drinks

Hi All

Our Sales Manager, Diane Lorimer, is leaving on Friday 7 November as her husband has been transferred to Sydney.

Diane has been with us for several years and will be missed by us all.

We will be having a staff function at 4 pm with drinks and nibbles. We have purchased a gift for Diane so please see Rachel as she has a card for all staff to sign.

Jennifer

Phone: (09) 42 27230
Mobile: 021 715567
Fax: (09) 42 27236

PO Box 187 Matakana, Auckland 0948
Website: www.cherylprice.co.nz
Email: info@cherylprice.co.nz

Facsimile



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Facsimile

TO:	Abacus Stationery	FROM:	Jennifer Anderson
FAX:	(09) 365 9001	PAGES:	1
SUBJECT:	Stationery Order	DATE:	23 October 2014

Please supply the following stationery (Order No. 1536) and deliver as soon as possible.

4 reams photocopy paper
Packet of 4 highlighter pens (various colours)
3 Eastlight folders
100 pack DL Envelopes

Many thanks.

Jennifer Anderson

Phone: (09) 42 27230
Mobile: 021 715567
Fax: (09) 42 27236

PO Box 187 Matakana, Auckland 0948
Website: www.cherylprice.co.nz
Email: info@cherylprice.co.nz

Invoice



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INVOICE

GST NO: 62-293-861

DATE: 23 October, 2014

INVOICE: 1123

Invoice To:
Omaha College
Shamrock Crescent
Omaha
Auckland 0948

School Contact: Mary

ORDER NO: 3490

Comments or Special Instructions:

QUANTITY	DESCRIPTION	UNIT PRICE	AMOUNT
1	Easy Steps - Unit 111 Word 2010 20 user licence	\$200 + GST	\$ 200.00
SHIPPING & HANDLING			4.44
SUBTOTAL			\$ 204.44
GST			30.67
TOTAL			\$ 235.11

Please make all cheques payable to **Cherylprice.co.nz**
If you have any questions concerning this invoice, contact us by email at info@cherylprice.co.nz

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Workplace Policies and Procedures

The chances are that any workplace for which you work will have documented policies and procedures (or they may be called 'rules' or 'regulations') about how workplace documents should be produced. Workplaces often have requirements about other matters too, such as how to dress, how to answer the telephone and how to handle customer complaints etc.

Workplaces have these policies and procedures to ensure that there is consistency across their documentation and publications.

Before producing a document of any sort, you should find out about the following:

- Presentation of documents – requirements for formatting and layout, eg font style and size, alignment and line spacing etc.
- Style of writing – it may be a requirement that all words to be written in full (cannot not can't; will not instead of won't) in order to promote a formal image.
- Use of word processing tools – are there time-saving word processing tools such as templates, styles and building blocks (auto text) already set up? How do you access them?
- Naming of documents – is there a style to be applied when naming (saving) documents? A workplace may require, for example, documents to be named by date first, then file number, then name of client.
- Storage of files/documents – where on the computer network are documents to be saved, ie what drive and within which folders? For example, a document may need to be saved into the personal drive of the writer, or a particular drive created for that particular purpose, eg all promotional material may be kept on the graphic designer's drive to ensure they are the only ones that amend those documents. Some workplaces require documents to be saved into folders by client name – there would often be subfolders to categorise different matters/events or document types relating to that individual client. Having a policy on how and where documents are saved enables staff to locate electronic files quicker as they will know where to look.
- Paper – is there pre-printed stationery, or a particular colour of blank paper, required to be used for certain documents? Letters will almost always be printed on pre-printed letterhead stationery. Internal memos might be required to be printed on coloured paper so that they are easily identifiable.

Where to find information on workplace policies and procedures

Policies to help you answer the above questions could be contained within any of the following:

- House Style Guide
- Quality assurance manual
- Workplace manual or guide
- Records management policy
- Statements of objectives
- Recommended Procedures Guide



The people most likely to know, besides your supervisor or manager, will include secretaries and administrators who deal with a lot of paperwork.

Document Accuracy

A document is used to convey information to a reader. If the information is incorrect or poorly worded the reader could interpret the document incorrectly. It also does not create a positive image for the workplace who has produced the document.

When you review a document it is very important to check the following:

- Is the information contained in the document correct – correct names and addresses, dates, times, place names, people's names, etc?
- Is the style of language used appropriate for the reader? For example, if technical words are used, for a person who does not have a background in the topic, it could appear overwhelming and confusing to the reader.
- Have you spell checked the document? Incorrect words can confuse a reader and appear unprofessional.

Check that your spell check and grammar facility is set to New Zealand English.
(Many computers are set to English US or English UK by default.)

See the following information within the Reference Section of this workbook:

Proofing tools – page 92

Using the Spelling and Grammar function – page 93

Spell check and grammar language – page 95

Changing the language setting – page 95

Spelling and grammar function options – page 96

TIP: Watch out for words like *organization*, *organize*, *summarize*, *prioritize* – the correct New Zealand spelling for these types of words is with an 's' – the use of a 'z' indicates US (American) spelling.

- Have you read through the entire document, reading each word and taking it in? Does each sentence sound correct and have correct grammatical rules been applied?
- Is the punctuation used in the document correct? Leaving out punctuation or not using it correctly will result in an unprofessional document, and possibly the incorrect context will be conveyed in some cases.
- Have any edits required been completed accurately?



Proof reading

In addition to using the Spelling and Grammar options that are available in Word, it is also **essential** that you proof read your work. The Spelling and Grammar feature may not pick up errors such as *there* for *their*, *ensure* instead of *insure* or *work* instead of *word*.

Proof reading a document *accurately* is not as easy as it sounds. This is partly because when we read a sentence, we don't realise that our eyes and brain function is not needing to recognise every individual word in order to understand the meaning of the message.



Effective proof reading methods:

- The most important thing to remember is to read the word s-l-o-w-l-y (ideally out loud if possible).
- When you reach a long word, eg organisation, break it down into smaller chunks – or-gan-i-sa-tion. This method helps to ensure that similar looking words like ‘manufacturer’ and ‘manufacture’ aren’t incorrectly typed. (Did you spot the difference between these two words?)
- When proof reading contracted (shortened) words, eg it’s, you’re, wasn’t, can’t, read the word in its fullest form. For example, proof read “They’re new house was painted red” as “They are new house was painted red” – as this doesn’t make sense, you are alerted to a possible error, in this case ‘they’re’ should be ‘their’.

Another good example is when we come across “its” or “it’s” – always read these words broken down as “it is” – if the sentence does not make sense then we know the correct spelling is “its” (*without* the apostrophe).

- If you are typing something with multiple paragraphs, after you have typed each paragraph, stop and proof read the paragraph you have just typed on screen before continuing with the next paragraph. This helps avoid the problem of your eyes getting ‘lazy’ by the time you are part way through a lengthy document and gives your hands a break from the keyboard.
- When you have completed typing a document, activate the spell check and grammar function (F7) and then print the document (Ctrl P).
- Use the printed (hard-copy) document to then proof read manually – a lot of people find they pick up far more errors using the hardcopy than the soft copy.
- For situations where documents have been copy-typed, it is highly recommended you pair up with someone else, with one person reading out loud the newly typed version and the other person carefully checking it against the original document. If the errors are not going to be corrected on the computer while the proof reading takes place, have a red pen or highlighter ready so any identified errors can be marked on the copy-typed version.

Checking document layout:

In addition to proof reading text, you should also check the document layout.

Check that:

- margins and horizontal alignment are correct.
- headings are graded and in the correct font and size etc.
- headings are consistent throughout.
- has open punctuation been used? (see below)
- any tabulated information vertically aligns correctly.
- numbering is sequential, ie paragraph and page numbering.



Never attempt to proof read text *and* layout at the same time!

Check them **separately**, ie proof read the text of the whole document first *then* go back to the start and check the layout (or vice versa).

Open punctuation

Open punctuation is where fullstops and commas are excluded, except where they are needed to understand a sentence. Below are some examples of how open punctuation is used.

Closed Punctuation ☒	Open Punctuation ☑
Mr D. & Mrs K.M. Williams P.O. Box 100 309 Acresville Rd. Dunedin 9016.	Mr D & Mrs K M Williams PO Box 100 309 Acresville Road Dunedin 9016
Dear Mr and Mrs Williams,	Dear Mr and Mrs Williams
DKM Williams Ltd.	DKM Williams Ltd
Yours faithfully,	Yours faithfully
e.g.	eg
1. 2. 3.	1 2 3

Exercise 1

The document below at the left has been given to a student (ie Susan) to edit and format. Susan's final document is shown at the right. The Spelling and Grammar feature has been used on this document.

- Proof read Susan's document and check it against the original document at the left. In the space provided underneath, write down anything that Susan has missed. (Remember you can use the Thesaurus (Shift F7) or a dictionary to help investigate the meanings of words.)

Original document

Susan's document

Omaha Surgery Ltd. Arial 14 pt bold, caps, centred

Notice to Patients

Arial 12 pt bold

Single spacing

Every ③ years we have to get our patience to enroll with the medical centre to ~~keep~~^{retain} your funding that will keep your consultations affordable. This also gives us a chance to make sure all your details are correct. [Please fill out the attached form and update any info that has changed since your last visit to the practice, could you also provide us with your emergency contract details.

Please sign and return in the prepaid envelope.

If you wish to dis cuss that further please do not hesitate to contact us,.

Bold this sentence.

OMAHA SURGERY LTD.

Notice to Patients

Every three years we have to get our patients to enrol with the medical centre to retain your funding that will keep your consultations affordable. This also gives us a chance to make sure all your details are correct.

Please fill out the attached form and update any info that has changed since your last visit to the practice. Could you also provide us with your emergency contract details.

Please sign and return in the prepaid envelope.

If you wish to discuss that further please do not hesitate to contact us.

.....

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.....

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Commonly misspelt words

While you have the benefit of Word's spelling and grammar facility, it is very helpful to develop a good understanding of various words which sound similar but are spelt differently.

For example, *stationery* (envelope, pen, paper) v *stationary* (not moving) and *residence* (home/house) v *residents* (the occupants of a home/house).

Here are some simple, every-day words which are commonly misspelt:

Word	Meaning	Example
Loose	Not fastened or tight	The jeans I tried on were too loose.
Lose	Misplace, fail	Don't lose that memory stick! Try not to lose sight of your goals.
Choose	Select	The coach will choose a new captain.
Chose	Past tense of 'choose'	The coach chose a new captain.
Its	Used for neuter things, ie not his or hers	The company was on its way towards a successful year. These are its footprints.
It's	Short for 'it is' or 'it has'	It's a beautiful sunny day.
There	In or to that place	There were too many errors. Please move the table over there.
Their	Belonging to them	Their car had broken down.
They're	Short for 'they are'	They are leaving in the morning.
Your	Belonging to you	Your car is awesome!
You're	Short for 'you are'	You're welcome. You're early.
Whose	Of whom or of which	Whose shoes are those?
Who's	Short for 'who is'	Who's on the phone?
To	Indicates movement towards	She walked to school.
Too	Also, as well, extremely	There were too many errors. The porridge was too hot.
Two	2 – the number	They have two cats and now no fish.



Remember to use Word's Thesaurus (Shift F7) or a good dictionary to look up meanings of words and their correct spelling, eg *weather* and *whether*.

Saving documents

Every document you create must be saved with a unique name (called the “file name”) so you can recall it to the screen for editing, formatting or printing at a later time. Keep file names simple and relevant to the document. It’s a good habit to save your document near the start of its creation, rather than at the end – you never know when there’s going to be a power-cut!

Important: You cannot use the following characters in a file name: / \ < > * ; : " ?

Naming documents

Your workplace may have policies in place dictating how files (documents) should be named, for example you may be required to add the date the document was created to the start or end of the file name. You must be sure to abide by these procedures – they are set in place so that everyone in the workplace will name files according to an accepted practice – this makes finding files easier and helps prevent lost files and wasted time. File names should be descriptive without being too long.

Some examples of different file naming conventions for a letter to Barbara Mellows regarding Sales Conferences include:

- *Name first* – Mellows, Barbara – Sales Conferences, 3 April 2013
- *Document type first* – Letter – Mellows – Sales Conferences, 3 April 2013
- *Date first (in format yymmdd)* – 140418, Mellows letter, Sales Conferences
- *Job or file number* – 9383233X, Mellows, 3 April 2013
- *Client name and abbreviation of document type* – Mellows_LET

Remember too that punctuation will affect alphabetical ordering when documents are saved so, for example, you must be consistent with use of commas or dashes.

Different naming techniques will organise documents in different ways where they are stored on your computer harddrive or your workplace computer network. Your workplace will tell you which method you are required to use. If not, you might use any of the following orders in file names:

Recipient name, Document type, Date, Subject

This method would keep all documents to a particular recipient together.

Document type, Recipient name (if any), Date, Subject

May be more useful for promotional documents, rosters etc, rather than letters, faxes, memos.

Date, Name, Subject

Dates are usually written all in numerals, with year first, then month, then day – this ensures files will always be listed in date order, eg 130218 is 18 February 2013.

File reference number, Name, Subject

May be particularly applicable to law firms or insurance companies where most items have a reference number.

Note

If a file or folder name is preceded by an exclamation mark it will appear at the top of the file (or folder) list, eg !Reports

In addition, workplaces will specify where on their computer network documents should be saved, whether it be on a shared network or a personal drive.

For ease of locating the soft-copy of a document, some organisations include within their workplace policies and procedures that all documents must include the document filepath and name in the footer which is then available as a reference when a hardcopy is produced. (See page 104 for instructions.)

Exercise 2

- 1 Mitchells is a small family company selling hand-crafted birdhouses and other small wooden garden ornamentals. Mitchells' new office manager has discovered that she can never find any documents when she needs to so she has set in place the following workplace policy regarding naming document files:
 - Work rosters to be saved in a folder called Admin, subfolder Rosters, with the file name consisting of the type of document followed by the date (in format yymmdd) of the first day that the roster covers.
 - Promotional material to be saved in a folder called Marketing, with the name of the item or event being promoted, followed by date of event (in format yymmdd).
 - Letters and faxes to be saved in a Correspondence folder and named with an abbreviation for document type, eg LET or FAX, followed by the surname of recipient (or key word of company name of recipient), subject and date (in format yymmdd).
 - Memos to be saved in Correspondence and named MEM followed by subject and date (in format yymmdd).
 - All documents must include the filepath and name in the footer at the left in 9pt font size.
- 2 Create folders and subfolders as required.
- 3 Open the documents **Mitchells1**, **Mitchells2**, **Mitchells3**, **Mitchells4** to see what content they have.
- 4 Check to see that it includes the document filepath and name in the footer, as required by the Office Manager.
- 5 Rename each document with new names that abide by the office manager's workplace policy.
- 6 Move each document into the correct folder. (You should only have the four renamed documents when you are finished.)



When you have completed this exercise:

- Compare your folder/subfolder structure and document file names with a peer learner; OR
- Ask your tutor to observe your completed file structure; OR
- Request to view the solution from your tutor and self-mark your work; OR
- Follow other instructions from your tutor.

Revision

- 1 Why is it important to follow accepted business conventions when producing documents?

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- 2 Give two examples of possible formatting requirements a workplace might have for the creation of correspondence (letters, memos, faxes).

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- 3 Describe two benefits to an organisation by having a policy and procedures or style manual outlining how its documents must be formatted and saved?

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- 4 What are some examples of word processing tools which can save time when creating documents?

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- 5 Write the keyboard quick keys for the following proofing tools:

Spelling & Grammar check:

Thesaurus:

- 6 The most important thing to remember when proof reading a document is

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- 7 When proof reading a document, what else should you be checking separately from the text?

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- 8 The following address example shows closed punctuation. Rewrite the address using open punctuation:

Mr J. M. Donaldson
P.O. Box 100
Motueka 7143.

- 9 When saving a document, what characters can't you use?

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- 10 Write today's date in the following date format – ddmmyy

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- 11 What is the advantage of having a document filepath and name shown in the footer of a printed document?

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