

Easy Steps



Unit 109 (v6)

**Apply text processing skills to
produce specialist documents**

with

Microsoft Word 2013

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

A Cheryl Price Publication

Unit Standard 109 (Version 7)

Apply text processing skills to produce specialist documents - Word 2013

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

Unit Standard 109 (v6) - BUSINESS INFORMATION PROCESSING (Level 4, Credit 6)
Apply text processing skills to produce specialist documents



It is recommended that defaults are changed according to instructions on page ix.

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

Retrievable exercise files are used with this book and listed on page xv. These are available as a free download from our web site at www.cherylprice.co.nz. Instructions for downloading the exercises are included on page xvi.

An Extended Learning Booklet which contains additional theory, revision exercises and general exercises is available in download format. This is a free resource to purchasers of this 109 v6 Unit Standard workbook.

This book has been written using Microsoft Word 2013 with Windows 8.

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

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PO Box 187
Matakana
Auckland 0948

Phone: (09) 422 7230
Mobile: 021 715566
Fax: (09) 422 7236

Web address:

www.cherylprice.co.nz

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Sample Document

Introduction

Welcome to Unit Standard 109 v6 Apply text processing skills to produce specialist documents with Microsoft Word 2013.

This book has been written using Microsoft Word 2013 with Windows 8. (The Windows 7 operating system can be used. However screen shots will differ slightly from those shown in this book.)

Default Settings

Before commencing this course you will need to check (and amend if necessary) the default settings for Word 2013 as described on pages ix to xi. This will ensure that all exercises and instructions in this book will work exactly as they should.

Retrievable Exercise Files

Some exercise files have been created for you to prevent time in keying in many exercises. You can then open these files and use the features of Word to manipulate and format text.

A list of these files is shown on page xv and instructions for downloading these files from our web site are included on page xvi.

What you will learn

In this course you will learn how to apply text processing skills to produce specialist documents with the following -

- spelling, grammar, vocabulary and punctuation options
- page layout, formatting
- instructions with extensive annotated drafts containing editorial amendments
- acceptable time frames

How you will learn

This book is divided into sections. Each section page lists the learning outcomes for that section. You will work through each section and do all exercises (or those instructed by your tutor).

Assignments are included at the end of each section. Our books include accumulation and consolidation of learning which carries across each section.

An Appendix is included at the end of the book. This contains Word 2013 quick reference notes as well as additional reference information.

After you have completed the book your tutor will give you the actual Unit Standard Assessment.

Word meaning boxes

Sometimes you will see a box at the left side of the page of a line that has dotted underlining. This box will contain information to help you understand the meaning of the underlined word (or how that word is formed). An example is shown below.

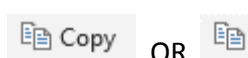
forecast
= to
calculate a
future
result

Data can therefore be altered to re-calculate budgets and to **forecast** results using different sales figures. Worksheets can be saved, opened and printed as required.

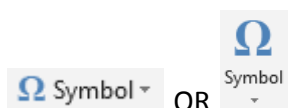
Different Word buttons

Depending on the size of your Word screen, buttons on the ribbon may vary to those shown in this book. The icon with the word of that feature may show, or the icon only.

For example, the Copy button in the Clipboard group on the Home tab may be displayed in either of the following ways.



The Symbol button can show as either -



Shortcut keys

Shortcut keys are indicated in the left margin, usually the first time they are used. An example follows.

- Ctrl S 1 Click on the Save button  on the Quick Access Toolbar .
- 2 Type a file name for your document then click on Save.

Glossary

Generally when a word(s) is first used that is a technical term or a word that you may not know that relates to an exercise, or a particular Word 2013 feature, a description is given. You will also see that such words are in **bold**.

These terms are listed on each section page, an example is shown below. Explanations are also included in the Glossary at the end of the book.



In this section you will come across the following words highlighted in bold. This indicates that the word is included in the Glossary at the end of the book together with a description of that word.

AutoCorrect
Clipboard
Correction Signs
Cut
Drag and Drop
Find

Format
Microsoft Office Help
Move Text
Navigation Pane
Proof-reading
Redo

Replace
Selecting Text
Synonyms and Thesaurus
Typing Replaces Selection
Undo

Icons used in this book

This book contains icons to help guide you in your learning.

The following list shows the icon and its meaning.



Learning Outcomes

Learning Outcomes are displayed on the section page and describe what you will learn in that section.



EXERCISE 1

These are the exercises that you are required to do. Often there will be an introduction sentence to tell you what you will be doing in that exercise.



These are notes for your information.

Assignment One


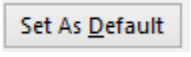
Each assignment covers consolidation of topics learnt in that section and provides practice for students prior to sitting the actual Unit Standard Assessment.

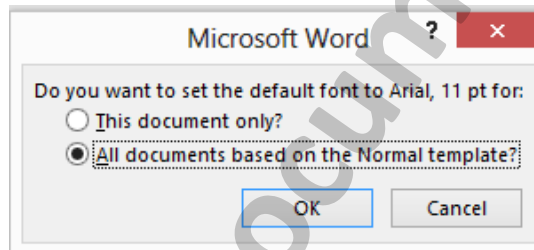
Changing Defaults

Default settings may have already been changed in your Word 2013 program. If not, you can use the following instructions to change these.

Font and Font Size

You can check if the font and font size have been changed by looking at the Font box on the **HOME** tab. If it shows **Calibri (Body)** **10** then it has not been altered. Change the default font to Arial 11 pt as follows:

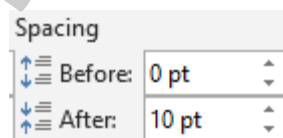
- 1 Click on the Font Dialog Box Launcher  which will display the Font dialog box.
- 2 Change the Font: to Arial and the Size: to 11 pt.
- 3 Click on .
- 4 Ensure the following option is selected for the font to be applied to *All documents based on the Normal template*.




- 5 Click on OK.

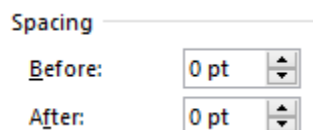
Spacing

- Click on the **PAGE LAYOUT** tab and if 10 pt Spacing After is displayed as shown below then this has not been altered. (Use the instructions below also if 8 pt After is displayed.)




Remove 10 pt spacing as follows.

- 1 Click on the Paragraph Dialog Box Launcher  which will display the Paragraph dialog box.
- 2 Change the Spacing After: to 0 pt as shown below.




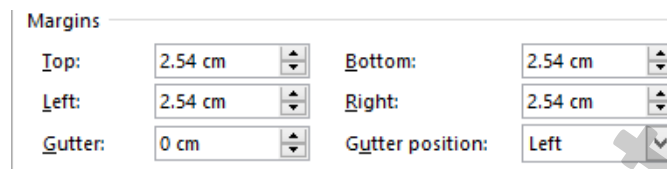
- 3 Click on .
- 4 Ensure *All documents based on the Normal template* is selected then click on OK.

Margins

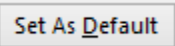
- On the **PAGE LAYOUT** tab click on the Page Setup Dialog Box Launcher  which will display the Page Setup dialog box.

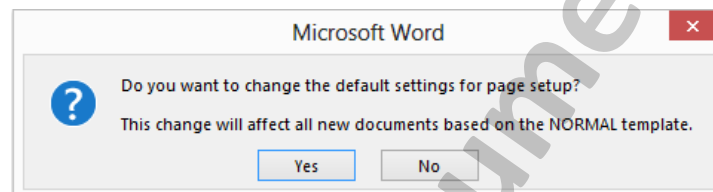
If margins are displayed as 3.17 cm change them as follows. (If they have been changed to those shown below click on Cancel.)

- 1 The Top: margin will be selected, ie **Top:** . Type: **2.54** then press the Tab key. Repeat this until the margins are displayed as shown below.



Margins	
Top:	2.54 cm
Bottom:	2.54 cm
Left:	2.54 cm
Right:	2.54 cm
Gutter:	0 cm
Gutter position:	Left

- 2 Click on .

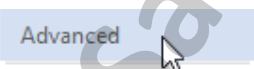


- 3 Click on Yes.

Bullets and Numbering

When bullets and/or numbering are inserted in Word 2013 a style is applied to these features. This can prevent spacing before and after, or spacing options to be used with the Line and Paragraph Spacing button.

You will therefore change bullets and numbering to be applied using the Normal style as follows:

- 1 Click on the **FILE** tab and select **Options**.
- 2 Click on  at the left.
- 3 Ensure a tick is displayed in the following ☒ **Use Normal style for bulleted or numbered lists**.
- 4 Click on OK.


Dictionary

Microsoft Office 2013 does not have an inbuilt dictionary. We recommend that you download the Bing Dictionary as instructed below.

(If another dictionary has already been added captures in our Word 2013 books will be very similar but may not be exactly the same.)

You will need to be connected to the Internet to be able to download the dictionary and to use it.

- 1 Click on the **INSERT** tab then click on .

- 2 In the Apps for Office dialog box click on  which will take you to the Microsoft Apps Store.

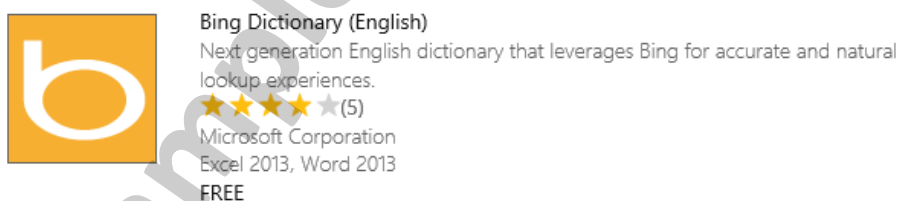
(If other apps have been installed you need to click on  Find more apps at the Office Store .

- 3 In the Search box at the top of the window type **dictionary** as shown below.




- 4 Click on the Search button .

- 5 Click on the following dictionary which we have selected because it is FREE and has the highest star rating. It can also be used in Excel 2013.



- 6 Click on  then on .



The Bing Dictionary will now show on the  button and will be used for spelling and grammar checking, synonyms and thesaurus.

Save Options

When a document is saved you will be requested to select the location, ie Computer then click on the Browse button and select the folder required. You can eliminate this procedure by selecting the location and saving directly to the Save dialog box and therefore bypass Backstage view.

For the purposes of this book we have used My Documents folder as the default folder. This means that files you open and save will be on your hard drive.



If you wish to open and save files to SkyDrive (ie the cloud) use instructions on the next page.

Use the following instructions to specify My Documents as the default file location:

- 1 Click on the **FILE** tab then click on **Options**.
- 2 Click on **Save** at the left.
- 3 Ensure that the Documents folder is displayed as the Default local file location as shown below.
- 4 Also ensure that *Don't show the Backstage when opening or saving files* option displays a tick.
- 5 Remove the tick from the next option *Show additional places for saving, even if sign-in may be required*.

- ☒ Don't show the Backstage when opening or saving files
- ☐ Show additional places for saving, even if sign-in may be required.
- ☐ Save to Computer by default

Default local file location:

C:\Users\Cheryl\Documents\

Browse...

- 6 Click on OK.

SkyDrive

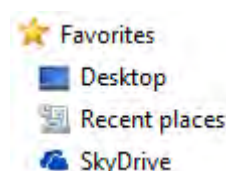
SkyDrive is a cloud storage application from Microsoft. It is one of the major online file storage options competing with Dropbox and Google Drive.



Because files are stored “in the cloud” it means that you can access those files from anywhere in the world because you will always have access to the SkyDrive application and your files. You do however need an Internet connection to be able to update those files.



Saving to SkyDrive


SkyDrive is automatically set up when Microsoft Office 2013 (ie Office 365) is installed on your computer. A SkyDrive folder will be displayed on the Navigation Pane in Windows Explorer as shown at the right.



Files can be saved manually by clicking on the Save button  on the Quick Address Toolbar, specifying a name for your file then clicking on the  SkyDrive icon (you may wish to double click on Documents and save to that folder).

SkyDrive as the Default File Location

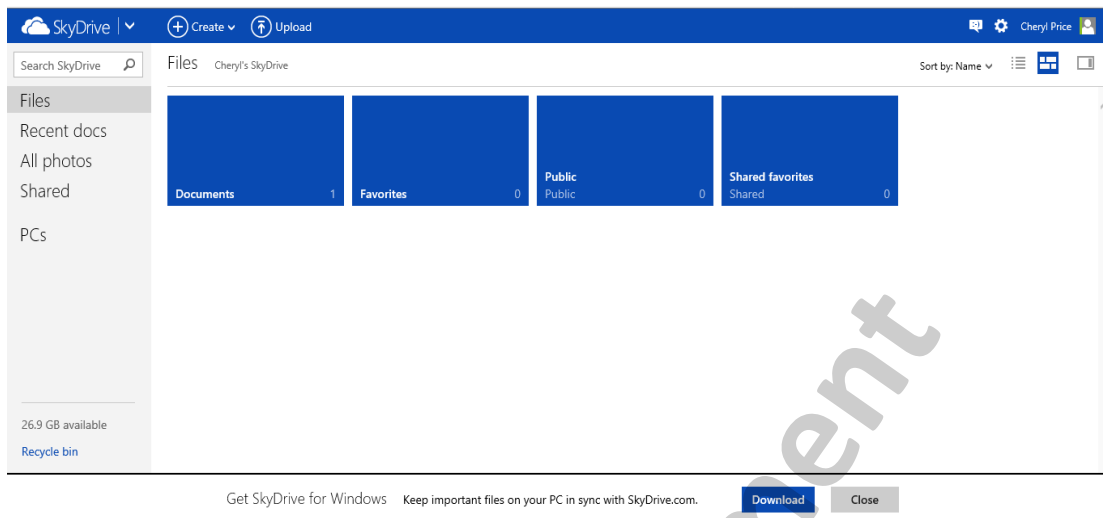
Use the following instructions if you wish to specify SkyDrive as your default file location.

- 1 Click on the **FILE** tab then click on **Options**.
- 2 Click on **Save** at the left.
- 3 Ensure that the Documents folder is displayed as the Default local file location as shown below.
- 4 Also ensure that *Don't show the Backstage when opening or saving files* option displays a tick.
- 5 Remove the tick from the next option *Show additional places for saving, even if sign-in may be required*.
- 6 Click on **Browse...** at the right of *Default local file location:* and select  SkyDrive .
☒ Don't show the Backstage when opening or saving files
☐ Show additional places for saving, even if sign-in may be required.
☐ Save to Computer by default
Default local file location: **Browse...**
- 7 Click on OK.

SkyDrive Website

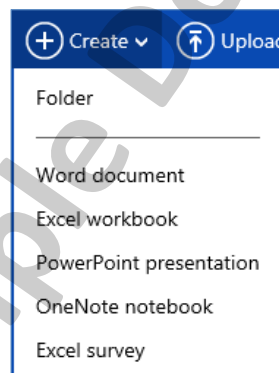
You can log in to the SkyDrive website using your web browser with your login name and password.

The website is www.skydrive.live.com.



You can upload photos and use files and share files.

New files can be created through SkyDrive by clicking on the **Create** button and selecting the program you wish to use, eg Word (web applications in SkyDrive are slightly cut-down versions of Office 2013 programs).



Sharing Files

From within Word 2013 you can save files to SkyDrive (usually to the Documents folder). You can then click on the **FILE** tab, on **Share** and invite people to share files in SkyDrive. (For further information click on the Help button **?** in the Share screen.)

Alternatively, you can right click on a file in the SkyDrive website (see above) and select Sharing.

Use Google in your web browser to search for additional information on SkyDrive.

Exercise Files used in this book

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

Names of files	
AA	Garamond Macron Font
B&A Paragraphs	Hillary Letterhead
Bloxbury Letterhead	Homonyms
Cashflow	Lecture
Confused Words1	Multi-Choice Questions File
Copy	Open Houses
Count	Planner
Count1	Roses Letterhead
Craft Homes	Sadd
Email	Specifications
Evans Letterhead	Star Signs1
Excavation	TEV Letterhead
FD Letterhead	Travel Destinations
FD Order Form	

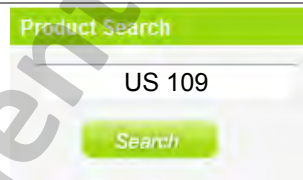


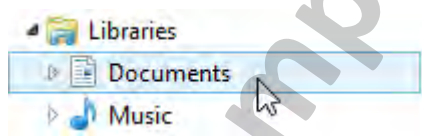
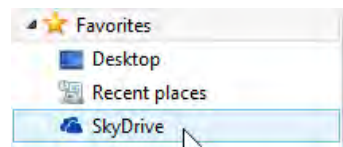
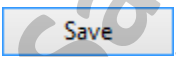

Note that there may be additional files downloaded not listed above which are for use with the Extended Learning Booklet for this unit.

Downloading Exercise Files

The exercise files listed on the previous page can be downloaded from the Cheryl Price web site using the instructions below.



Exercise files can be downloaded to My Documents folder OR SkyDrive. However, for the purposes of this book we have specified My Documents as the folder for saving and opening files. If you are using SkyDrive simply use the SkyDrive folder instead.

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. 
4	Click on 
5	Click on US 109
6	Under the Exercise Files heading click on the underlined blue hyperlink, ie Book Exercise Files – V6 Word 2013 Free Download The File Download dialog box will display.
7	<p>a Click on  Save as then click on the Documents folder shown below at the left OR on SkyDrive shown below at the right.</p> <div style="display: flex; justify-content: space-around;">   </div> <p>b Click on .</p>
8	<p>a Click on .</p> <p>b Right click on the zipped exercise file and select Extract All. Click on Extract. A folder will be created containing the exercise files.</p> <p>c Delete the Compressed (zipped) Folder.</p>

NZQA Outcomes and Evidence Requirements

Unit Standard 109 Version 6

Title	Apply text processing skills to produce specialist documents		
Level	4	Credits	6

Purpose	People credited with this unit standard are able to apply text processing skills to produce specialist documents.
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Classification	Business Administration > Business Information Processing
-----------------------	---

Available grade	Achieved
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Entry information	
Recommended skills and knowledge	Unit 108, <i>Apply text processing skills to produce business documents</i> .

Explanatory notes

- 1 All activities associated with this unit standard must comply with occupational health and safety guidelines and recommendations in relation to working environment and work practices. Reference for this unit standard includes OSH 3211 AFC: 1996 *Approved Code of Practice for the use of Visual Display Units in the Place Of Work*. Occupational Safety and Health Service: Department of Labour, available at <http://www.osh.govt.nz/order/catalogue/pdf/vdu-ac.pdf>.
- 2 Definitions
Text processing conventions refers to accepted practices of display for page layout, font selection and size, text formatting, use of lines, boxes and borders, expression of scientific and mathematical symbols and formulae, foreign languages, and white space.
Conventions used must produce documents that are fit for their intended use and meet organisational style requirements.
Commercially acceptable time frame is a period of processing time considered acceptable in New Zealand business and in line with client needs and expectations.
- 3 Evidence of text processing and editing skills must include the following features, which may be demonstrated once over all five specialist documents rather than in each – extensive amendments, scientific and mathematical symbols and formulae, tables, boxes and/or borders.
- 4 Spelling, grammar, vocabulary, and punctuation in the documents must be consistent with the nature and purpose of the business or organisational information required.
Candidates must be given the opportunity to proofread their work prior to submission.

- 5 This unit standard does not cover the requirements for medical and legal documents, as those are included in: Unit 21866, *Demonstrate knowledge required in medical administration roles, and produce medical documents*; Unit 18180, *Produce text processed clinical documents*; and Unit 127, *Demonstrate knowledge required in legal administration roles, and produce legal documents*; Unit 110, *Review text processing and information production practices in a business or organisational context*, at level 5, also includes legal documents.

Outcomes and evidence requirements

Outcome 1

Apply text processing skills to produce specialist documents.

Range specialist documents may include but are not limited to – organisational, administrative, promotional, scientific, mathematical, academic documents; evidence is required for five different types of specialist documents.

Evidence requirements

- 1.1 Spelling, grammar, vocabulary, and punctuation are consistent with the nature and purpose of the specialist documents required.
- 1.2 Page layout, format and display of specialist documents are consistent with text processing conventions and the outputs required, and meet organisational style requirements.
- 1.3 Specialist documents are composed from instructions, including annotated drafts containing extensive editorial amendments, in accordance with information provided and output required.
- 1.4 Specialist documents are processed and presented within a commercially acceptable time frame and in accordance with information provided and output required.
- 1.5 Specialist documents are produced in accordance with text processing conventions.

Planned review date	31 December 2015
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Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	30 March 1993	December 2011
Review	2	27 June 1996	December 2011
Review	3	28 April 1997	December 2011
Review	4	28 June 1999	December 2011
Review	5	26 September 2005	December 2012
Review	6	17 December 2010	N/A

Accreditation and Moderation Action Plan (AMAP) reference	0113
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This AMAP can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

Section

1

Styles Creation of Documents/Templates



Learning Outcomes

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

- ☐ Apply styles to your documents
- ☐ Create documents/templates -
 - Letterheads
 - Use a template
 - Memoranda
 - Insert field codes
 - Fax forms
 - Email messages
 - Forms
 - Form letters
 - Application forms



In this section you will come across the following words highlighted in bold. This indicates that the word is included in the Glossary at the end of the book together with a description of that word.

Field Codes
Fill in Template


Styles
Template


Styles

A style is a set of formatting instructions combined into a meaningful name that can be applied easily to text, eg formatting instructions for a heading that is Arial, 14 pt, left aligned and bold, could be assigned as Heading 1 in the Styles gallery.

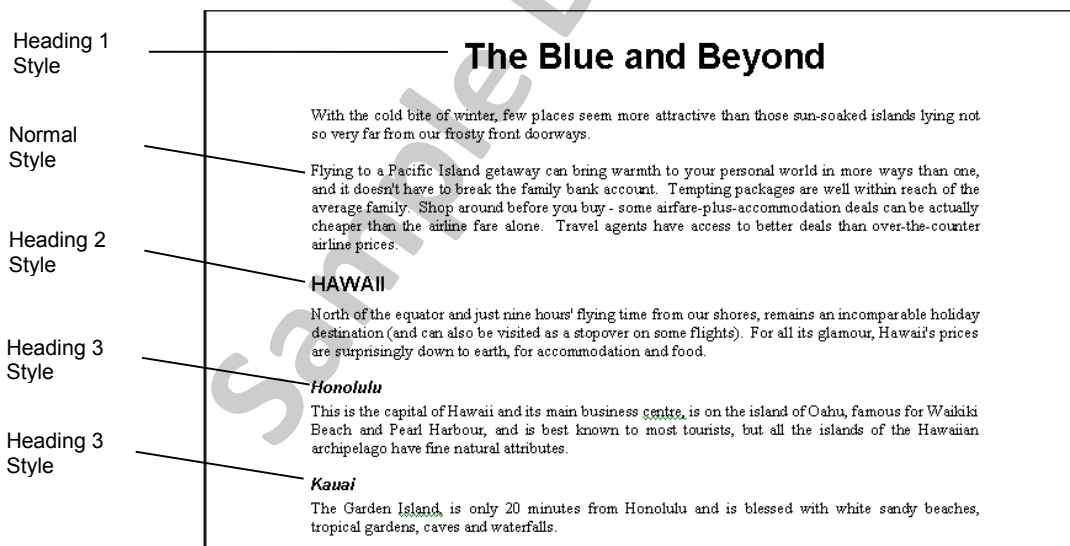
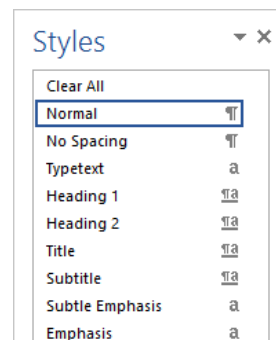
Styles provide consistency to your work, can be easily applied, and when a style is edited all occurrences of that style will change throughout your document. Styles should be used on all lengthy documents.



The Quick Style gallery shown above is located in the Styles group of the **HOME** tab. This gallery lists all the styles that can be used in this document. If the style required is not shown on this list click on the  to the right of the gallery to see an expanded list of Quick Styles.

Styles can also be accessed by clicking on the  in the Styles group which will open the Styles Task Pane as shown at the right.

An example of the use of styles is shown below.



In this unit you will learn the basics of the Styles feature so that you can apply consistent formatting to lengthy documents.



Styles provide consistent formatting to documents. Styles can be created in a **template** and that template can be used to ensure that the same formatting is applied over all documents within an organisation, eg correspondence, financial documents, specialist documents etc. (See pages 190-191 for further information on organisational style requirements.)

Changing Styles Options

In the following exercise you will change the style defaults to show the next heading in the Styles group when the previous level is used.



EXERCISE 1

- 1 Open the file called ***Travel Destinations***
- 2 Click on the Styles  to open the Styles task pane.
- 3 At the bottom of the Styles task pane click on **Options...**
- 4 Ensure a tick is in the ☒ **Show next heading when previous level is used** box then click on OK.
- 5 To close the Styles Task Pane click on the Close button .

Using and Modifying Styles

In this exercise styles will be applied to text and then they will be modified to reflect a different font, size, colour and spacing.



EXERCISE 2

- 1 In the open file ***Travel Destinations*** select the first heading called *The Blue and Beyond*.
- 2 On the **HOME** tab select Heading 1 from the Styles gallery.
- 3 Select the first side heading, *HAWAII* then click on Heading 2. (Notice as each heading is applied, eg Heading 2 the next heading is displayed, eg Heading 3.)
- 4 Select the second side heading *Honolulu* then click on Heading 3.
- 5 Apply styles in this way throughout the document.
- 6 Modify styles using the relevant instructions below:
 - a Select the first heading *The Blue and Beyond*. Change the formatting to Arial 24 pt, bold, centred, 0 pt Spacing Before, 18 pt Spacing After.
 - b Right click on Heading 1 style in the Styles group and select **Update Heading 1 to Match Selection**.
 - c Select Heading 2 and change the style to Arial 14 pt, bold, 6 pt Spacing Before and After, Dark olive green font colour. Update the style.
 - d Select Heading 3 and change the style to Arial 12 pt, bold, italics, 6 pt Spacing Before and After, Dark olive green colour. Update the style.
 - e Scroll through the document to see the changes.
- 7 Spell check the document.
- 8 Add page numbering to the bottom centre of the page.
- 9 Save the document, print and close it.



EXERCISE 3

- 1 Open the file called **Specifications**
- 2 Apply styles throughout.

Shortcut keys can be used as follows:

Heading 1: Alt Ctrl 1
 Heading 2: Alt Ctrl 2
 Heading 3: Alt Ctrl 3

The Repeat key (F4) can also be used to apply styles.

- 3 Format heading styles as follows:

Heading 1: Arial 20 pt, bold, left aligned.
 Heading 2: Arial 14 pt, bold, All Caps, 9 pt spacing after.
 Heading 3: Arial 12 pt, bold, italics, 6 pt spacing after.
 Normal: Arial 11 pt, left aligned.

- 4 Ensure that work for each contractor starts on a new page.
- 5 Insert page numbering. Before the ROOFER section type the following.

Fittings ——— Heading 2

Construct the various fittings as shown on the drawings.

Cupboards are to be of standard construction and divided into door and drawer units as directed.

Sink top as specified under "Plumber". Other bench tops are to be of selected "formica" or "laminex" with matching edging.

Cupboard doors to have solid core hardboard faced doors. Drawers to have sides dovetailed to fronts and hardboard bottom.

Supply a standard bathroom cabinet with a mirror rebated and beaded to the door.

Stairs ——— Heading 2

Closed type ——— Heading 3

To be constructed with stringers 250 x 50mm, treads 40mm thick and risers 25mm thick. The treads and risers are to be housed 15mm, glue wedged and glue blocked to the strings. Nosing to be 30mm maximum.

Open type ——— Heading 3

To be constructed with undercarriages 150 x 75mm tread eats and treads 50mm thick timber - no risers.

Supply handrails 75 x 50mm bevelled and rounded to one side of each flight of stairs. Supported on handrail brackets or timber balusters.

Creation of Documents

Most organisations have documents on file which are opened when required. Examples of these are: letterheads, memoranda, faxes, forms, “form letters” and product lists (which, of course, can be amended when necessary).

In some of the work contained in this Unit, documents will require to be typed and saved for future work. The use of different sized fonts is advisable.

Letterhead

Ensure that all important information is included. This could be all, or some, of the following:

Name of firm

Type of business, eg *Cartage Contractors*

Firm’s motto, eg *Service Guaranteed*

Firm’s logo

Name of manager/partners

Qualifications, eg *LLB*

Physical address

Mailing address, eg *PO Box 890*

Telephone number(s)

Fax number

Email/web address

The following is an example of a simple letterhead:

Birrell & Aicheson Ltd

Landscape Gardeners

16 River Road
Kumeu
Auckland 1250

Phone: (09) 412 8877
Fax: (09) 412 7788
Website: www.birrellaicheson.co.nz

Templates

When you create a letterhead (or allow for the top margin of a printed letterhead) it is useful to save that document as a template.

A template is a standard document that it is created and saved. Then you can use that *template* over and over again to create documents with that standard format and save them with their own individual document names.

A *document* in Word is saved with a .docx extension;

A *template* is saved with a .dotx extension.

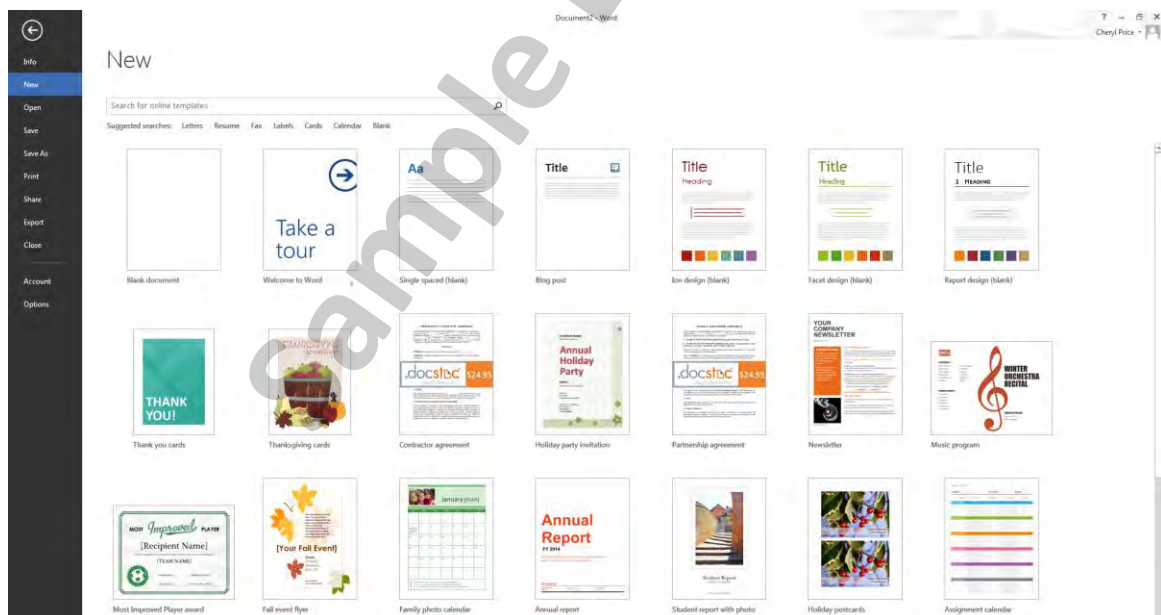
File extensions are often not displayed but can be seen by right clicking on a file and selecting Properties (General tab).

A template is simply a “read-only” file – when it is used it must be saved with a different file name.

A fax, memo and other fill-in files can also be saved as templates with codes inserted so you can move from place to place throughout the document (see page 10).

To see where templates are saved, click on the **FILE** tab, on **Options** then on **Advanced**. Scroll down and click on **File Locations...**. The location of User templates will be displayed. This is the folder where your templates are stored.

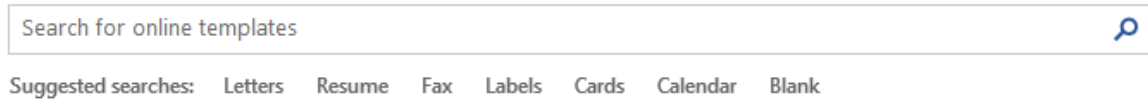
Word contains supplied templates, eg design templates, family photo calendar, recipe cards etc from the **FILE** tab then **New** as shown below.



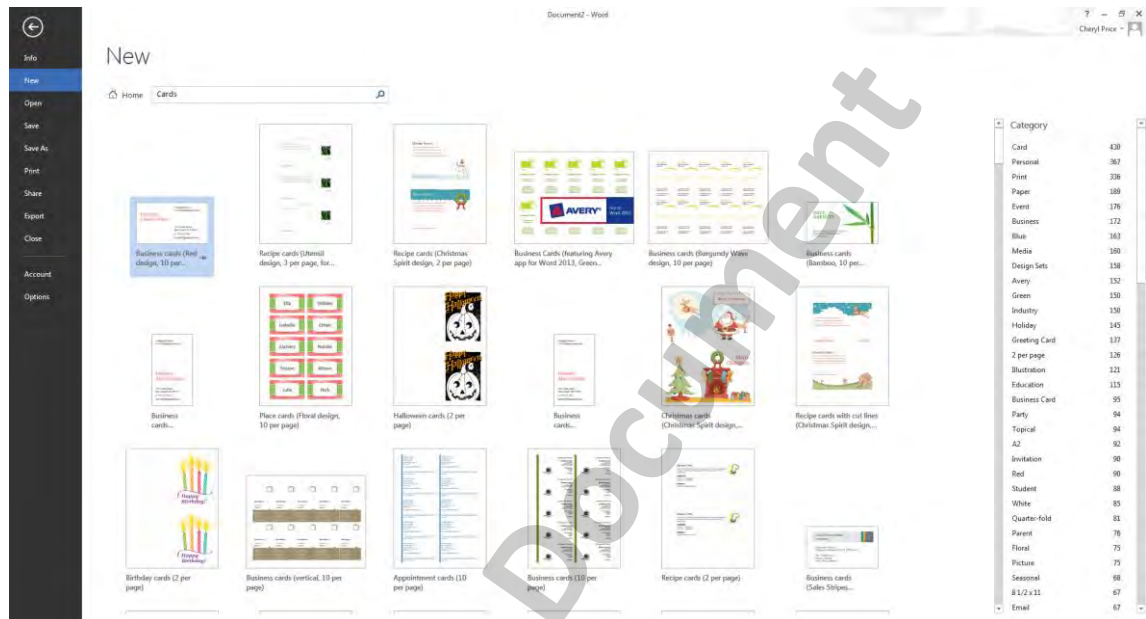
Other templates are available online from the **FILE** tab then click on **New**.

You can click on Suggested searches, eg Letters, Resume, Cards etc shown below,

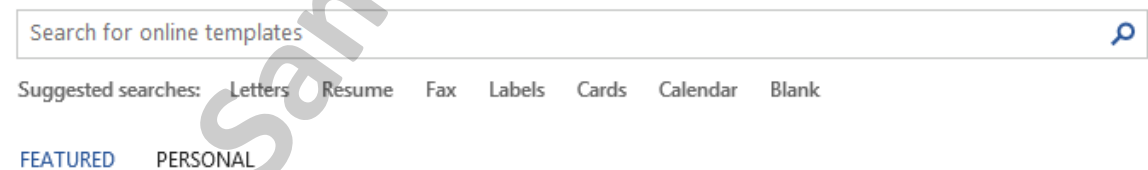
OR you can click in the Search for online templates box and search for a specific template required.



The following capture shows the results of a search for Cards.


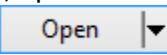


When a created template is saved it is stored in the PERSONAL section. FEATURED templates are the supplied Word templates as shown below. (FEATURED and PERSONAL will only appear when a personal template has been saved.)


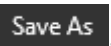





Creating a Template

It is advisable to save the letterhead text (or top margin setting to allow for a printed letterhead) as a template.



If this is not possible on your system, open the document as “read only” in Word by clicking on the file name and then on the  of  and select Open Read-Only. This will ensure that you save with a new file name.

General Instructions:

- 1 Type the letterhead text, or change the margins to allow for printed letterhead.
- 2 For a memo, fax, or fill-in letter insert field codes where data is to be filled in by pressing Ctrl F9 then pressing the End key.
- 3 Click on the  tab and select .
- 4 Click on  Computer then on .
- 5 Click on the Save as type:  and select Word Template.
- 6 Type a name for the template and click on Save.
- 7 Close the template.

Using a Template

A created template can be used whenever required as follows:

- 1 Click on  then on .
- 2 Click on PERSONAL and open the template from there.

Remember, you will be saving the template as a *document*.

Editing a Template

A template can be edited by opening the template making changes then saving and closing it.

Created templates are saved in the Custom Office Templates folder under My Documents Folder.



When styles are created/amended and saved in a template those styles will be available for all documents based on that template.



EXERCISE 4

- 1 For practise, create a template for the letterhead on page 5.
- 2 Save as **Birrell Letterhead**

Memoranda

A memorandum (memo) is an inter-office/inter-organisation note from one person to another. Most memos are typed on A4 portrait in single spacing and a printed form is sometimes available. Many organisations send email memos but there are some companies where staff do not have computers such as factories. It is therefore necessary for memos to be distributed.

An example of a printed blank memo form is shown below. Note that a left aligned tab stop is set at an appropriate place for the details to be inserted in line. Alternatively, a two column table (without lines displayed) can be used.

There are different ways that memos can be created and used. Codes can be inserted so the user can jump from place to place to insert the variable information.

- In Word, field codes are inserted by pressing Ctrl F9 then the End key (shown as {} below).
- The form can then be saved, preferably as a *template*, and then reused.
- F11 is used to move from code to code.

MEMORANDUM

(Set tab here for second column)

TO: {}

FROM: {}

DATE: (Click on the Insert tab then click on Date and Time. Ensure the format is 11 November 2014 and a tick is displayed in the *Update automatically* check box. Click on OK.)

SUBJECT: {}

In this Unit you will create a memo form with fill-in codes and save it as a *template*.



In most offices these days memos have been replaced by emails. Groups, or Distribution Lists can be set up in the Contacts part of your email program. You can then add the addressees and send an email to the group when required (confidential information eg salary increases, redundancy etc should always be sent as a memo or letter in a sealed envelope).

Employees in some organisations however, for example, factories, do not have access to computers and therefore memos need to be typed and distributed.




Inserting Field (keyboard) Codes

The following exercises will help you understand how to create a **fill in Template** using **field codes** in Word which can be used to enter variable information. A template is best used for this purpose.

Creating a Fill-in Template



EXERCISE 5

- 1 Create a new document and type the text and field codes for the memo shown on the previous page.
- 2 For each place where information is to be inserted (including the actual memo text) insert a field code by pressing Ctrl F9 then the End key.
- 3 Click on the **FILE** tab and select **Save As**.
- 4 Click on  Computer then on .
- 5 Click on the Save as type:  and select Word Template.
- 6 Save as **Office Memo**
- 7 Close the template.

Using a Fill-in Template



EXERCISE 6

- 1 Click on the **FILE** tab and select **New**.
- 2 Click on **PERSONAL**.
- 3 Click on the **Office Memo** template to create a memo *document* based on the Office Memo template.
- 4 Press F11 to move to the To: field then type: *John Morgan*
- 5 Press F11 to move to the From: field and type your own name.
- 6 Press F11 to move to the Subject: field and type: *Easter Break*
- 7 Press Ctrl End and type:

Please note that the office will be closed for the Easter break from Thursday 21 April until Wednesday 27 April. We have given staff an extra day's holiday because Waitangi Day and Anzac Day this year fell on weekend days.

- 8 Print the memo then close without saving.

Fax Forms

The following is an example of a blank fax form. Note that a left aligned tab stop is set at an appropriate place for the details to be inserted in line. Alternatively, a two-column table (without lines displayed) can be used.

The first page of the fax sheet is referred to as the “cover” sheet. It is most important that the number of pages is entered correctly so the recipient can check that he/she has received all pages.

FACSIMILE	
	(Set tab here for second column)
TO:	{ }
COMPANY:	{ }
FAX NO:	{ }
FROM:	{ }
DATE:	(Click on the Insert tab then click on Date and Time. Ensure the format is 11 November 2014 and a tick is displayed in the <i>Update automatically</i> check box. Click on OK.)
SUBJECT:	{ }
NO. OF PAGES:	{ }
(incl cover)	



EXERCISE 7

- 1 Create a template using field codes for the fax shown above.
- 2 Save as a template with the file name of **Office Fax**



EXERCISE 8

- 1 Open the **Office Fax** template (under the PERSONAL heading) as a *document*.
- 2 Create a fax using F11 to move from field to field.

The fax is to David Langford at the company called Langford Printing Ltd. The Fax number is 09 422 8976. The fax is from yourself – you are an employee at Robinson and Robinson; the Subject is Photocopy Paper; number of pages is 1.

Compose a message requesting 8 reams of photocopy paper to be sent to you urgently.

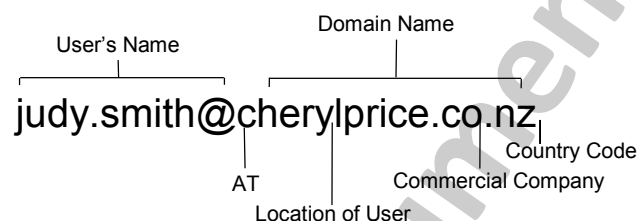
Email

Email is used extensively for personal communication, within an office from one person to another, from office to office within the same country, and overseas. The most used email programs are Outlook Express and Microsoft Outlook. The general principles for sending email are the same in all programs. It is possible to send an email message/document directly from Word as long as an email account has been set up and an Internet connection is available.



EXERCISE 9

- 1 Open your email program (OR use the file called **Email** if you don't have email software).
- 2 Click on the New Email button which will display the New Message window.
- 3 Click in the To: box and type the email address of the person you are sending the email to. An example of an email address is shown below.



Email addresses that you use frequently can be added to Contacts. To send an email to more than one person you can type several email addresses separated by semi-colons (one space) in the To and/or Cc boxes as shown below.

judy.smith@cherylprice.co.nz;ihall@e-resources.co.nz;ahall@hotmail.com

A signature file can be set up to appear automatically every time you send an email.

- 4 Type the following email message from yourself then click on the Send button if you are using email. (You will receive a reply as we have an automatic reply system set up.)

