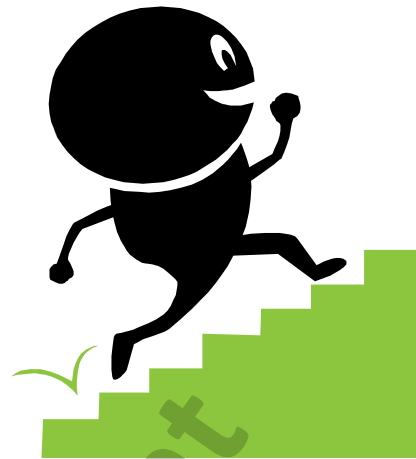


Easy Steps



Unit 113 (V7)

**Produce business or organisational
information using advanced word
processing functions**

with

Microsoft Word 2010

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

A Cheryl Price Publication

Unit Standard 113 (Version 7)

Produce business or organisational information using advanced word processing functions - Word 2010

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

Unit Standard 113 - BUSINESS INFORMATION PROCESSING (Level 4, Credit 10)
Produce business or organisational information using advanced word processing functions (version 7).

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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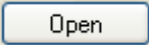

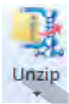


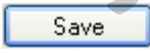
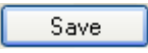
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3	Click in the Product Search box and type the number of this unit standard, as shown at the right. <div data-bbox="1187 501 1482 680" data-label="Image"> </div>
4	Click on 
5	Click on US 113
6	Under the Exercise Files heading click on the underlined blue hyperlink, ie Book Exercise Files – V7 Word 2007 or 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  .
	b Click on the  of the  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  button and click on the My Documents folder. The files will be unzipped.
8	Click on  and ensure My Documents folder is displayed. Click on 
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.

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Unit Standard 113 Version 7

Title	Produce business or organisational information using advanced word processing functions		
Level	4	Credits	10

Purpose	People credited with this unit standard are able to: apply advanced features and functions of word processing to produce business information; and apply language and text processing skills to produce business information.
----------------	---

Classification	Business Administration > Business Information Processing
-----------------------	---

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

Entry information	
Recommended skills and knowledge	Unit 112, <i>Produce business or organisational information using word processing functions.</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 *Guidelines for Using Computers*. Occupational Safety and Health Service: Department of Labour, available at <http://www.osh.dol.govt.nz/order/catalogue/computers.shtml>.
- 2 **Definition**
Established conventions refer to accepted practices of display and design for page layout, font selection and size, use of proportional font, text formatting, use of lines, boxes, borders, shading, tables and columns, and margin alignment. Conventions used must produce documents that are fit for their intended use and meet organisational style requirements.
Organisational requirements refer to the management practices used by the organisation.
- 3 Business or organisational information requires the production of six different types of complex documents which may include but are not limited to – legal, financial and technical documents; formal reports; formal meeting documents; promotional brochures; forms for completing electronically and/or manually.

- 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 Logical structures such as folders must be used to organise and store files according to organisational requirements.

Outcomes and evidence requirements

Outcome 1

Apply advanced features and functions of word processing to produce business information.

Evidence requirements

- 1.1 Advanced formatting features are applied to present documents in accordance with the output required and organisational style requirements.

Range advanced formatting features include – creation and application of styles, table of contents and index, drop-down list and inserted field codes (in electronic form), complex tables, macros, outline numbering, page and section breaks, import/embed data from another software application; includes at least two of the following – use of foreign characters, mathematical symbols and/or foreign currency symbols, calculations and use of formulae, integration of text and graphics, assembling documents using hyperlinks.
- 1.2 Documents are produced incorporating multiple columns and tabulated material in accordance with system features and output required.
- 1.3 Templates are produced and variable data is inserted in accordance with the output required.
- 1.4 Documents are produced using advanced merge options in accordance with the output required.

Range conditional merge, multiple merges from same data source, linked files, if/then/else statements, random data records, linked database; evidence of three is required.
- 1.5 Document summary sheets are used to ensure effective file management in accordance with file access and retrieval requirements, and organisational requirements.
- 1.6 File management facilities are used to search, locate, and manipulate word processing files, folders and subfolders in accordance with system features and organisational requirements.

Outcome 2

Apply language and text processing skills to produce business information.

Evidence requirements

- 2.1 Spelling, grammar, vocabulary, and punctuation are consistent with the nature and purpose of the complex documents required.
- 2.2 Page layout, format and design of complex documents are consistent with established conventions, the output required, and meet organisational style requirements.

Sample Document

Exercise Files used in this book

(Instructions are at the front of this book for downloading retrievable files from our web site.)

Names of files	
Address Data	Lifestyle Books Budget 2012
Africa	Lifestyle Books Letterhead
Airport	Lifestyle Books Sales Summary
Aroma	Lilies
ASB Bank	Macadamia Nuts
Barrier Reef	Macadamia Story
Barrier Reef Info	Managing a Mortgage
Basket Glory	Meeting Documents
Book Sales for 2011	Orchids
Book Sales for 2011-Chart	Pacific Islands
Building Specifications	Paris in the late 19 th century
Business Data	Pool Tips
Cairns	Prize Data
Care of a New Puppy	Promotional Brochures
Clipper Cruises	Queensland Art Gallery
Contiki	Refrigeration
Culinary Herbs	Rembrandt to Renoir
Easyplan	Roses
Far North Temperatures	Rotorua
Financial Documents	Shareholders Report
Floating Tables	South Africa
Formal Reports	Sparkling Pools
Forms	Tables Exercises
Fuel	Technical Documents
Growing Beautiful Roses	Technical Documents Steps
Growing Herbs	Tennis Club
Harold Spencer Exhibition	The Big O.E.
Herbs	Training Confirmation
Herbs1	Triathlon
Hillside	Using Bulbs
Hockey	Vegetables
Holiday	Viva Las Vegas
Holland	Whales Exhibition
How to Grow Orchids	Whale Exhibition Prices
Johannesburg	Windows 7
Legal Documents	Word 2010 Revision

Section

1

Fonts and Page Layout Multilevel Numbering Borders and Shading Symbols and Characters File Management

Learning Outcomes

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

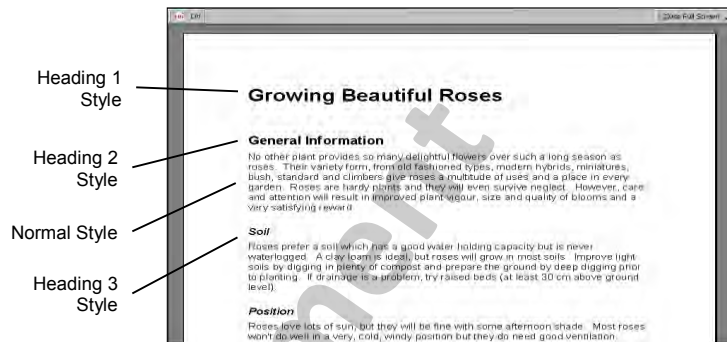
- ☐ Describe advanced word processing features
- ☐ Understand the use of fonts, planning a document and page layout.
- ☐ Customise the setup in Word 2010
- ☐ Use Document Properties for efficient file management
- ☐ Use bullets, numbering and multilevel numbering
- ☐ Apply borders and shading
- ☐ Insert symbols and characters
- ☐ Locate files and folders stored on your computer
- ☐ Search for files and folders using search features
- ☐ Manage files and folders
- ☐ Use printing options

Introduction

Advanced word processing skills provide solutions to many of the problems that occur when working with longer and more complex documents than a simple letter, memo or report. It is a common occurrence for a word processing operator to create, edit, or otherwise manage documents that are several hundred pages in length. Advanced skills focus on ways to effectively manage this type of document, emphasising features and functions that automate tasks, and manage large documents effectively. Some of the advanced word processing skills you will learn in this book are described below.

Styles

A style is a set of formatting instructions combined into a meaningful name that can be applied easily to text. One of the main purposes of styles is to create consistency. For example, the same style should be applied to all the main headings in a document, and all the other levels of headings below them should also be consistent.



In this way it is clear which sub-headings belong together under main headings and therefore belong to the same subject.

Styles can also assist with navigating in a long document, because it is possible to “browse” by heading, jumping from one to the next, as long as styles have been applied.

Word contains a large number of built-in styles for use in many different kinds of documents. These styles can be modified or new styles can be created.

Macros

A macro is a series of Word commands grouped together as a single command. Its purpose is to automate repetitive tasks, saving time and reducing the opportunity for errors. A macro can be assigned to a shortcut key combination or to a button on the Quick Access Toolbar or the ribbon.

Fields

Fields are codes that instruct Word to insert text, graphics, page numbers, dates, etc. Fields automate tasks that would otherwise be completed manually and constantly modified as changes are made to a document. An example is the use of fields for page numbering; sequential numbering occurs automatically and is retained when pages are added or removed. A date field will automatically update to show the current date every time the document was opened.

Templates

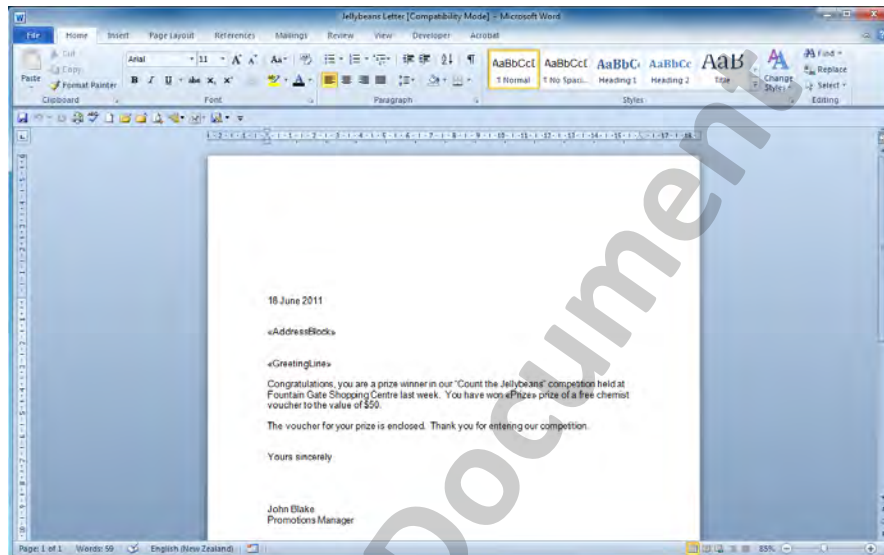
Word has a number of templates containing styles and page layout settings for creating different kinds of documents. Many of them contain powerful built-in macros that prompt for information or instructions for inserting information in the appropriate place. Templates are used to save time and to ensure that similar documents, such as faxes, letters or memos, are formatted consistently. They can be modified to suit specific requirements, or new templates can be created. A template can contain styles, macros and fields.

Sections

Long documents can be split into sections that contain different formatting or other features. For example, each section could have its own title in a header or footer, or a certain section could be displayed in Landscape orientation to better display the information in it, such as a chart or table.

Advanced Merging and Sorting Data

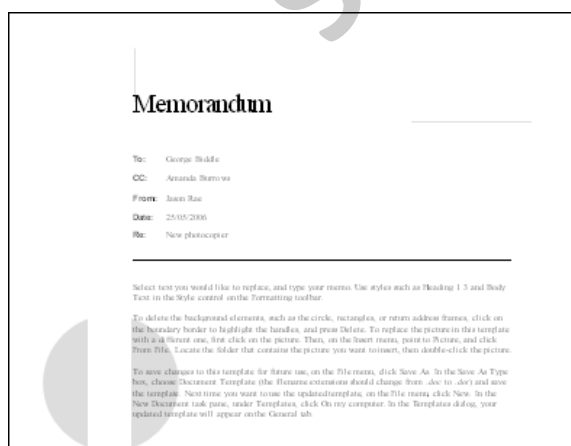
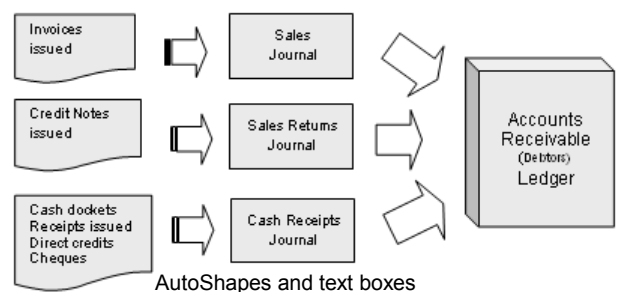
Mail merge simplifies repetitive documents and tasks. It can create many documents at once that contain identical formatting, layout, text, graphics, etc and where only certain parts of each document vary. A common use of mail merge is to combine a main document such as a letter or email, with variable information, such as the names and addresses of those to whom the letter will be sent.



Advanced merge options such as sorting and the use of fields further automate and refine the mail merge process, providing a fast and accurate solution to potentially complex and time consuming tasks.

Graphics

Graphics can provide significant enhancements to a professional document. It's possible to add not only pictures, but many other images, such as text boxes, a variety of shapes, callouts, captions, charts, WordArt and watermarks.



Heading created using WordArt

Memo containing watermark (based on the Contemporary Memo template)

Standard Formats

Most organisations use a system for formatting of documents which is often referred to as in-house organisational style. This results in standardisation and recognition of documents and creates an image/branding for that organisation. Documents generally include:

Letterhead
Memos
Faxes
Agenda
Minutes of Meetings
Emails
Report production
Spreadsheet headings and formatting
Balance Sheets and accounting documents, eg invoices, statements
Additional documents relating to the type of business, eg in a legal firm this would include wills, deeds etc.

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



Templates

“Templates” are generally set up for documents that are used often, eg a Word fax form, Excel Balance Sheet, specific formatting of a PowerPoint presentation etc. A template in simple terms is a read-only file that can be opened on screen with formatting applied. Styles are usually set up in a template for ease of use and to ensure consistent formatting. Text can also be included in a template, eg fax information such as To, From, Date, Subject.

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**. This can then be applied from the Styles box on the Formatting toolbar to all text requiring this formatting.

Look at the headings on this page - the following styles have been used:

Standard Formats

Heading 1 (Arial 18 pt, bold, Hanging Indent 0.5 cm, 15 pt Spacing After)

Templates

Heading 2 (Arial 15 pt, bold, 12 pt Spacing Before)


Styles

Heading 3 (Arial 12 pt, bold, 9 pt Spacing After)

Normal Text

Normal (Times New Roman 11.5 pt, Justified)

Templates are usually set up by staff with a high knowledge level of Word. The templates can then be used easily by other staff who may not have such a good knowledge.



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Easy Steps



Unit 107 (v6)

Apply text processing skills to produce communications in a business or organisational context

with

Microsoft Word 2010

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

A Cheryl Price Publication

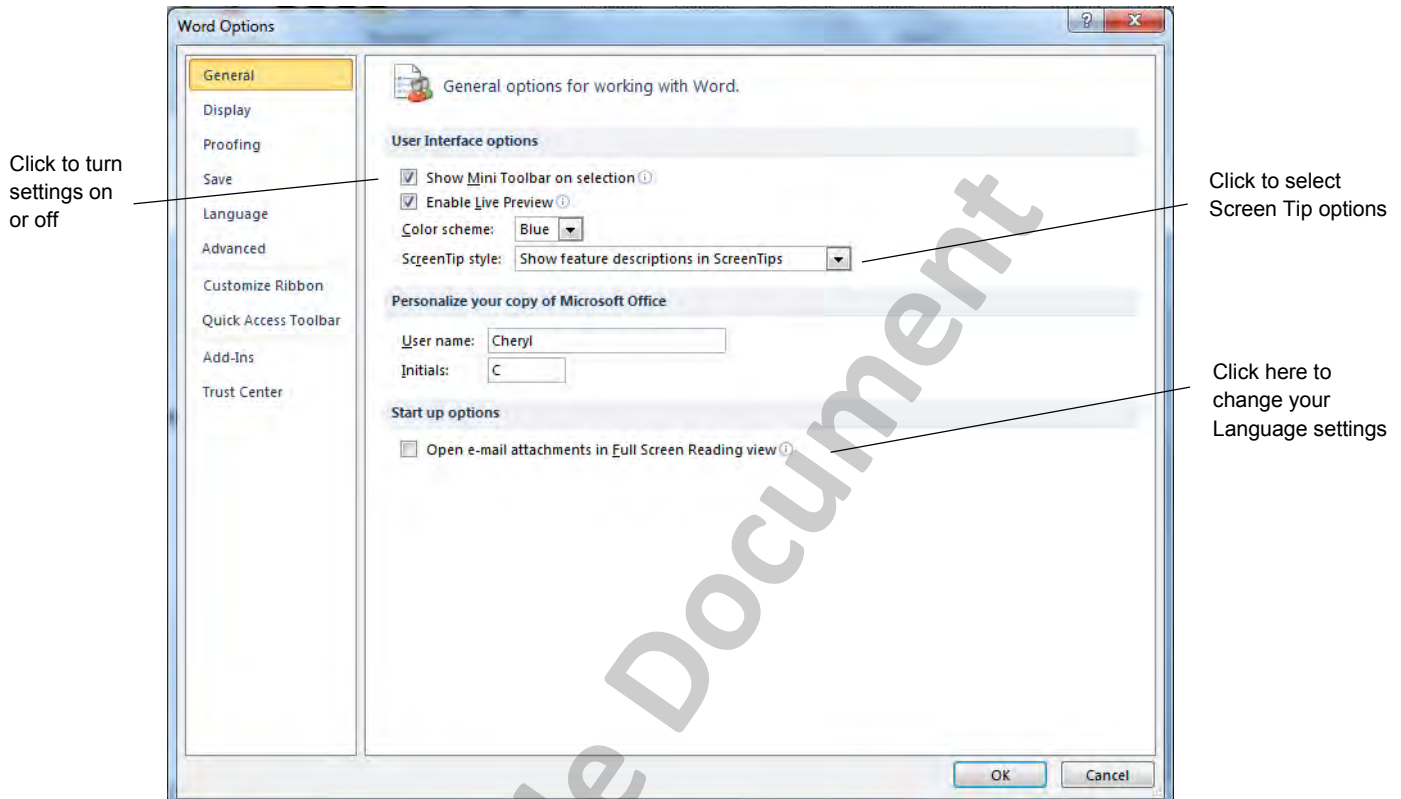
The image shows a business card for Cheryl Price Coaching. On the left is a circular logo with a blue background, featuring a white notepad with a pencil. To the right of the logo, the text "Cherylprice.co.nz" is written in a blue, sans-serif font, with "For excellence in training techniques" in a smaller, grey font below it. On the right side of the card is a black silhouette of a person running up a green staircase. In the center, the name "Cheryl Price" is written in a blue, sans-serif font, with "Director" in a smaller, grey font below it. At the bottom left, the address "PO Box 187", "Matalana", "Auckland 0948", and "New Zealand" is listed. At the bottom right, the contact information "Phone: 09 4127230", "Fax: 09 4227236", "E-mail: cheryl@cherylprice.co.nz", and "Web site: www.cherylprice.co.nz" is provided.

Change the Settings using the File tab

Exercise 1

- 1 Start Word 2010 then click on the **File** tab.
- 2 Click on **Options** at the bottom of the menu.

The Word Options dialog box will display and General will be selected at the top left.



The following two options can be changed if desired:

- Click in the ☒ to turn the Mini Toolbar or Live Preview settings on or off.
- Click on the of the ScreenTip style: box to select between the options. Note that the *Don't show feature descriptions in ScreenTips* option will show only the name of the command in the screen tip, but no other information.

- 3 Click on **Advanced** at the left.
- 4 Ensure the following option is checked ☒ **Use Normal style for bulleted or numbered lists**. This will ensure that additional spacing is not included in bulleted and numbered lists.
- 5 Ensure Show measurements in units of: displays **Centimeters**. Scroll through the other options and make changes as required.
- 6 Click on **OK** to accept the changes to the settings.


Note Live Preview, Screen Tips and the Mini Toolbar will not be specified in this book. It is optional as to whether you wish to use these features.

Customising the Quick Access Toolbar


The Quick Access Toolbar can be used for your most frequently used commands. It can be customised – commands can be added or removed and the toolbar itself can be positioned either above or below the ribbon.

Quick Access Toolbar List

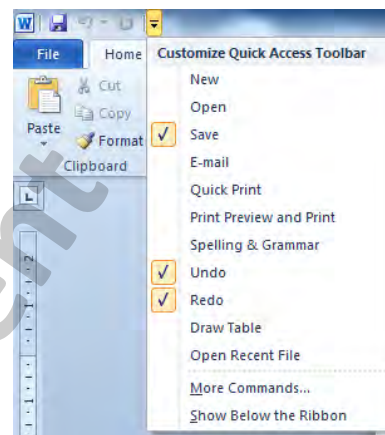
Exercise 2

- 1 Click on the Customize Quick Access Toolbar  to the right of the Quick Access Toolbar. Options that can be added are displayed as shown at the right.

A tick displays to the left of every option that is currently displayed on the Toolbar.

- 2 Click on New to add it to the Quick Access Toolbar.
- 3 Click on the Customize Quick Access Toolbar  again and click on Open.
- 4 Add the following options to the Toolbar using the same steps.


Quick Print, Spelling & Grammar



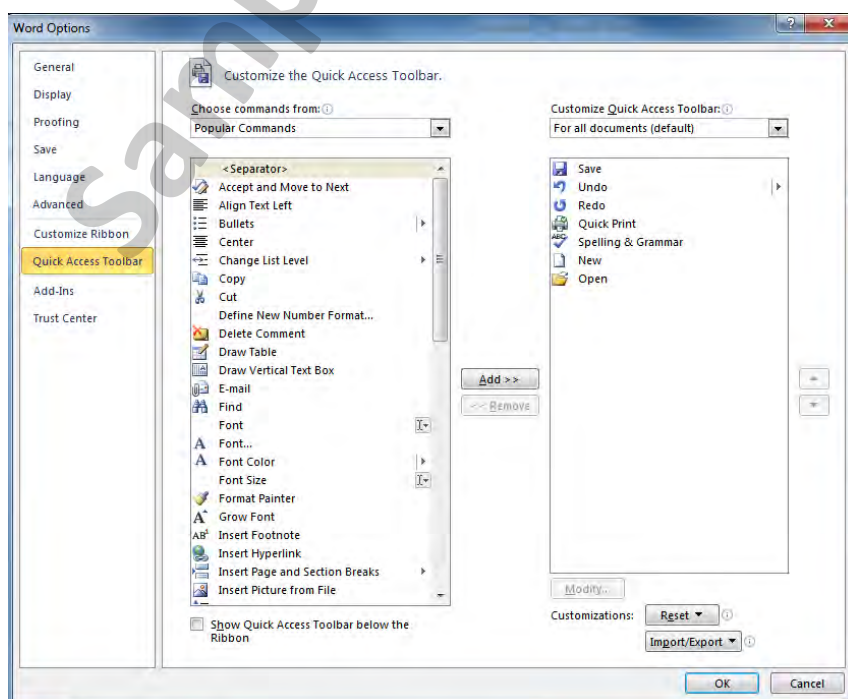
Additional Quick Access Toolbar Commands



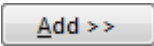


Some other useful options that are not on the Quick Access Toolbar list can be added using the following steps.

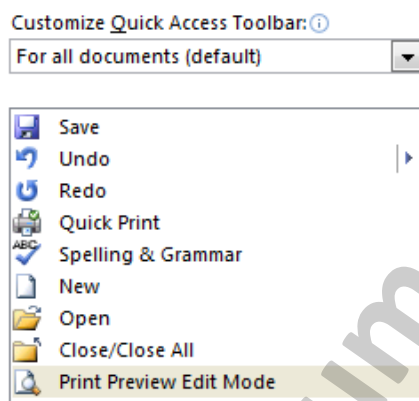
Exercise 3


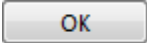
- 1 Click on the Customize Quick Access Toolbar  at the right of the Quick Access Toolbar and select *More Commands...*

The Word Options dialog box will display, with the Quick Access Toolbar option selected.



- 2 Click on the Choose commands from:  and select All Commands. The commands are listed in alphabetical order.
 - 3 In the list at the left, scroll down until Close/Close All is displayed.
 - 4 Click on  Close/Close All then click on .
 - 5 Also add  Print Preview Edit Mode which is Print Preview from Word 2007 (and Word 2003). (You can also add Print Preview and Print which is the Word 2010 option if desired. This will be displayed with the same button  but the name will be different.)
- The commands will be added to the Quick Access Toolbar list on the right as shown below.



- 6 Add other buttons as required, eg AutoText.
- 7 Ensure a tick is displayed in the following option  Show Quick Access Toolbar below the Ribbon at the bottom of the dialog box.
- 8 Click on .


The Quick Access Toolbar is now displayed between the ribbon and the ruler as shown below.



You can click on the Customize Quick Access Toolbar  and select Show Above the Ribbon. The position that you display the Quick Access Toolbar is entirely up to you.

It is a more effective option however, to display the Quick Access Toolbar below the ribbon for speedy access to the buttons you have added.

You can add other useful buttons to the Quick Access Toolbar as you progress through this book.

Note The ribbon can also be customised by clicking on the File tab, selecting  Options then Customize Ribbon. Commands can be added/removed in the same way as customising the Quick Access Toolbar. New groups and new tabs can be created.

Fonts and Effects

Fonts and Typefaces

A *font* is a specific typeface of a given size, such as Arial.

A *typeface* is a set of characters designed with a distinctive pattern, eg Algerian or Palatino.

Fonts can be "scaleable" fonts which means that you can specify any size up to a maximum size that you desire, or sometimes the font and size will be listed as Times Roman 12 pt.

Some typefaces are called *serif* fonts. Serifs are small embellishments at the end of the line strokes of each character (little curly parts). Typefaces without serifs are called *sans serif* typefaces and these are plainer fonts. Your printer manual will tell you how to do a font test to see the different fonts on your printer.

Serif font

This is Times New Roman 14 pt font

Sans serif font


This is Arial 14 pt font


Look at the two font examples closely. You will notice that in particular, the T and the f in the serif font are more decorative than the sans serif font.

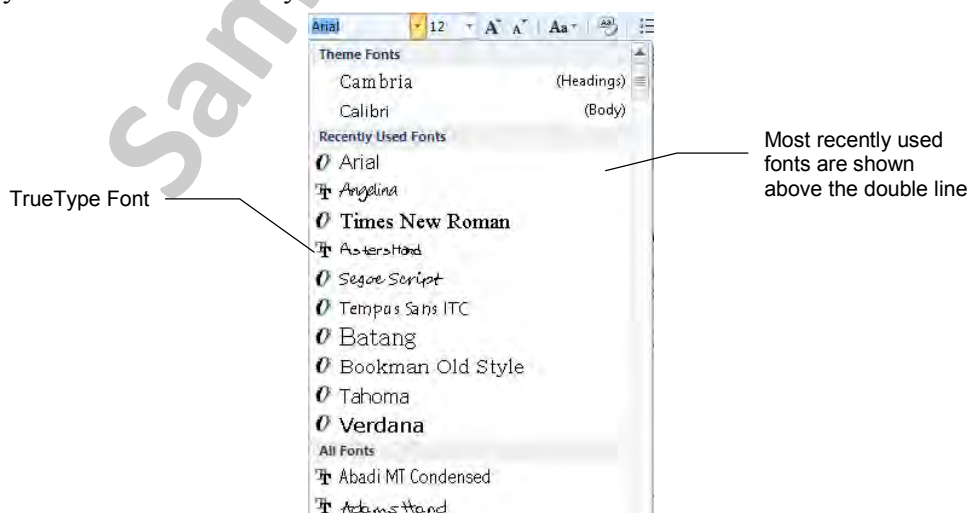
Fonts are measured in "points". There are 72 pts to 2.54 cm (1"). (12 pts = 1 pica, 6 picas = 2.54 cm.) Fonts can also be measured as cpi (characters per inch) on dot matrix printers and bubble jet printers. The larger the point size the larger the font, the smaller the cpi size the larger the font.

Be consistent with using fonts and as a general rule do not use more than two different fonts in one document for general office work. Often Times New Roman is used as body text and Arial for headings.

Fonts Available in Word 2010

Windows has a variety of "TrueType" fonts that will print with all printers (shown as  next to the font). Other fonts that have been installed may also be True Type fonts or Adobe fonts.

- Click on the Font  in the Font group on the Home tab to see the two types of fonts displayed. The actual font style is also shown.



It is preferable to use TrueType fonts if the files will be used on another computer. TrueType fonts will print with all printers whereas installed fonts may be specific to that computer. They will need to be copied to the Windows, Font folder if used on another computer, or embedded in the file.

The new **Standard** default font that comes with Word 2010 is **Calibri 11pt** for normal body text and **Cambria** for headings, eg

Calibri (Body)

This is Calibri 11 pt font

Cambria (Headings)

Cambria 14 pt font

Other standard fonts can be used and these are the ones shown below which are used most of the time, eg

Times New Roman

This is Times New Roman 12 pt font

Arial

This is Arial 12 pt font

Non-standard fonts are fonts which are used for decorative or specific purposes, eg

Brush Script MT

This is BrushScript MT 16 pt font

Algerian

THIS IS ALGERIAN 18 PT FONT

Colonna MT

This is Colonna MT 16 pt font



Type Size

Type size should relate to the importance of the message it communicates, eg the major heading in your document should be a larger point size than subheadings. Lack of contrast in headings can confuse the reader of the document. Captions should be in a smaller point size than normal text. The following shortcut keys are useful to increase/decrease font sizes on selected text.

Ctrl] Increases the font size by one point size

Ctrl [Decreases the font size by one point size

Expanded/Condensed Text

Text can be selected and expanded/condensed by clicking on the Dialog Box Launcher  of the Font group, Advanced tab. Select Expanded or Condensed from Spacing:  then specify the measurement in the By: box. Click on OK.

Effects

In addition to changing the size of type, Word 2010 has the following effects available which can be selected from the Font dialog box or used with shortcut keys. Some of these effects will be printer dependent.

Strikethrough

~~**Double Strikethrough**~~

^{Superscript}

_{Subscript}

Shadow


Outline

Emboss

Engrave

SMALL CAPS

ALL CAPS

Hidden (text is only displayed when the Show/Hide button  is activated)

White Space

White space provides contrast and enables the reader to absorb the context of your document. Avoid white space between words by using hyphenation, particularly in column work. In desktop publishing work and in newspaper columns it is better to use one space after a full stop than two. The use of white space generally improves the appearance of your document.

Page Layout

Headings

There are several ways of formatting a heading, depending on the emphasis required.

Centred Heading

This is an example of a centred heading. This type of heading can be used with any style of paragraph - block, first line indent, indented or hanging.

Note You would not use a block heading at the left margin and then use a centred heading after it – a centred heading is usually a priority heading.

Font Sizes

It is not current practice to underline headings. Font sizes are used to grade headings in basic office work, eg reports, documents, etc.

Word allows you to grade headings by changing the **size** of the “font”. This is a preferable way to emphasise text rather than using underlining. The larger the “point” size, the larger the type.

Often headings are in a sans serif font, ie a plain font without small embellishments at the end of the line strokes of each character (eg Arial) and the main text in a serif font, ie with small embellishments at the end of the line strokes of each character (eg Times New Roman, which is an easy-to-read font). For continuous text a serif font is easier to read.

In most commercial documents the first heading is in the largest font size (eg 18 pt), the second heading would be a slightly smaller font size (eg 16 pt) and side headings in a slightly smaller font size (eg 14 pt).

Headings can be emphasised with bold and/or italics but ensure that these enhancements are also graded, eg do not bold a heading unless the heading above it is bold also.

As a general rule, for office type work do not use more than two fonts in one document. A variety of font sizes can be used and the use of excessive capitalisation can be eliminated.

First Heading

Second Heading

XXXX XXXX XXXX XXXX XXXX XXXX XXXX XXXX XXXX XXXX XXXX XXXX XXXX
XXXX XXXX XXXX XXXX

Third Heading

XXXX XXXX XXXX XXXX XXXX XXXX XXXX XXXX XXXX XXXX XXXX XXXX
XXXX XXXX XXXX XXXX

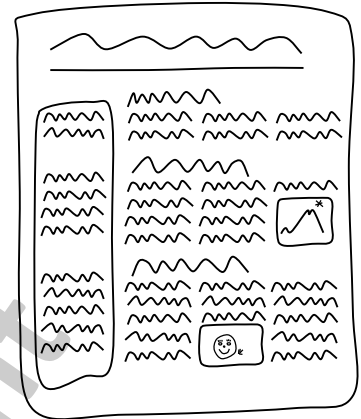
Fourth Heading

XXXX XXXX XXXX XXXX XXXX XXXX XXXX XXXX XXXX XXXX XXXX XXXX
XXXX XXXX XXXX XXXX

Planning a Document

It is a good idea to plan a document that will include text and graphics by sketching out on paper different layouts and ideas of the appearance you wish your document to have. Bear in mind the following principles of page layout:

- Proportion:** Consider the relative importance of each item, ie the relationship between type, white space, graphics, paper size and orientation.
- Balance:** The positioning of elements on a page.
- Harmony:** The elements should conform to the paper size, ie portrait/landscape.
- Variety:** In size, alignment, font, style, but remember that overuse can lead to chaos.
- Sequence:** The eye should flow easily through the text/graphics and from one part of the layout to another.
- Unity:** Look at the overall artistic design of the completed work.



Also consider the following:

- Whom is this document intended to attract?
- What is your message?
- What form is the publication going to take, eg book, brochure, flyer, magazine, etc
- Is the content and style appropriate for my audience?
- Am I consistent with my headings and text style?
- Is there enough contrast and white space to add interest?
- Does my publication look busy (crammed and not easy to read)?

In advertisements, flyers, etc, you can vary the display. Often text in the largest font size displays the main emphasis. A variety of fonts, font sizes, enhancements, etc, can be used but it takes practice to produce attractive documents. Study newspapers and magazines for good ideas.

Look at the two publications below. The publication on the left is an example of inferior design and the one on the right is attractive and appealing.

