

Easy Steps



Unit 12886 (V6)

Customise software features and create document templates for generic text and information management

with

Microsoft Word 2010

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

A Cheryl Price Publication

Unit Standard 12886 (Version 6)

Customise software features and create document templates for generic text and information management - Word 2010

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

Unit Standard 12886 - TEXT AND INFORMATION MANAGEMENT GENERIC (Level 3, Credit 6)
Customise software features and create document templates for generic text and information management (Version 6).

This book includes assignments based on the 12886 Version 6 Unit Standard. Word 2010 Reference Notes are included at the end of the 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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Downloading Exercise Files

Exercise files can be downloaded from the Cheryl Price web site as follows:


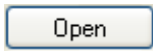




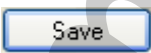
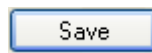
1	In your web browser, type: www.cherylprice.co.nz
2	Press Enter on the keyboard to display the Cheryl Price website.
3	Click in the Product Search box and type the number of this unit standard, as shown at the right. <div data-bbox="1136 470 1444 645" data-label="Image"> </div>
4	Click on 
5	Click on US 12886
6	Under the Exercise Files heading click on the underlined blue hyperlink, ie Book Exercise Files – V6 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  .
	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.

Table of Contents

Section 1 – Layout Information

Advertisements.....	2
Layout.....	2
Content.....	2
Design Checklist.....	3
Brochures/Flyers	4
Layout.....	4
Content.....	4
Checklist.....	5
Newsletters	6
Layout.....	6
Content.....	6
Checklist.....	7
Newspaper Articles.....	8
Layout.....	8
Content.....	10
Design Checklist.....	11
Programme	12
Layout Tips.....	12
Questionnaire	13
Layout Tips.....	13
Tables	14
Layout Tips.....	15
Reports.....	16
Layout.....	16
Content.....	16
Checklist.....	17
Annotated Letters	18

Section 2 - Publications

Scenario 1 - Wholistic Health Ltd.....	21
Scenario 2 - Home Buyers Association.....	26
Scenario 3 - Sunnyfields Community Centre	34
Scenario 4 - Mangawahi Secretarial Services.....	46
Scenario 5 - Supreme Supermarkets.....	58
Scenario 6 - Bruce Gardner Motors	67
Scenario 7 - NatWest Bank	75
Scenario 8 - Office Secretaries Association.....	80
Scenario 9 - Travel Plus	89

Section 3 - Reference Notes

AutoText.....	102
Adding the AutoText Button to the Quick Access Toolbar	102
Creating an AutoText Entry.....	102
Inserting an AutoText Entry	103
Printing AutoText Entries	103

Renaming an AutoText Entry.....	103
Deleting an AutoText Entry.....	103
Editing an AutoText Entry.....	103
Borders and Shading.....	104
Borders button.....	104
Borders and Shading dialog box.....	104
Creating Custom Borders.....	105
Page Borders.....	106
Automatic Border.....	106
Shading.....	106
Bullets and Numbering.....	107
Bullets.....	107
Indenting Bullets.....	107
Numbering.....	108
Modifying Numbering.....	108
Multilevel Numbering.....	109
Columns.....	111
Columns Button.....	111
Columns Dialog Box.....	111
Default Settings.....	112
Fonts.....	112
Page Setup.....	113
Tabs and Indents.....	114
Leader Tabs.....	114
First Line Indent.....	114
File Locations.....	114
Specifying the Default Printer.....	115
Graphics.....	116
Drawing a Box/Circle/Rectangle/Square/Line.....	116
Adjustment Handles.....	116
Selecting Object(s).....	116
Moving Object(s).....	117
Changing the Line/Fill of an Object.....	117
Creating a Text Box.....	117
Send Backward, Bring Forward.....	117
Group/Ungroup.....	117
Inserting Pictures.....	118
Adding Text to Shapes.....	118
Shadow and 3-D Options.....	118
Drop Caps.....	118
Headers and Footers.....	119
Different Headers/Footers in Different Sections.....	120
Inserting a title page.....	120
Macros.....	121
Recording a Macro.....	121
Assigning a Macro.....	122
Keyboard.....	122
Quick Access Toolbar.....	122
Editing a Macro.....	123

Deleting a Macro	123
Page Numbers	124
To edit page numbers.....	124
To delete page numbers.....	124
Sections	125
Spelling	126
Adding Words to the Dictionary	127
Styles	128
Printing Styles.....	129
Using styles as you type	129
To Create a New Style.....	130
To Modify a Style	130
Symbols	131
Tables	132
Parts of a Table	132
Tables Tools.....	132
Insert Table.....	132
Draw Table	132
Design and Layout Tabs.....	133
Selecting within a Table.....	136
Table Styles.....	139
Templates	140
Creating a New Template	140
Using a Template	141
Editing a Template.....	141
Saving a Document as a Template.....	141
Copying Template Items.....	142
Attaching a Template to a Document.....	142
WordArt.....	143

Unit Standard 12886 Version 6

Title	Customise software features and create document templates for generic text and information management		
Level	3	Credits	6

Purpose	<p>This unit standard is intended for people who input and manipulate information using software applications to create documents which communicate efficiently and effectively and have visual appeal.</p> <p>People credited with this unit standard are, for generic text and information management, able to: apply customising features of software to enhance documents from provided data and by direct composition; and create a document template for a specific purpose.</p>
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Classification	Business Administration > Text and Information Management - Generic
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Available grade	Achieved
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Entry information	
Recommended skills and knowledge	Unit 12883, <i>Enter and manage text for generic text and information management</i> , or demonstrate equivalent knowledge and skills.

Explanatory notes

- 1 Customising software features in this standard must be applied in accordance with standard operating features of the software program being used by the candidate.
- 2 All activities associated with this unit standard must comply with *Guidelines for using computers: Preventing and managing discomfort, pain and injury*, (Wellington: Accident Compensation Corporation, Department of Labour, 2010), available at <http://www.osh.govt.nz/order/catalogue/computers.shtml>.

3 Definitions

Customise for the purposes of this unit standard means to make changes to auto features for a specific purpose, such as removing the full stop from the numbering function or increasing the distance between the bullet and text.

Direct composition refers to text created in candidates own words without prior preparation and entered directly on the keyboard.

Fit for purpose means the information is accurate and relevant to the intended audience, and the document is free from text errors.

Intended audience is the individual or group who will receive the information, therefore the amount and nature of the information and the level of the language must be appropriate to this audience. The intended audience will be specified for each document.

Provided data refers to but is not limited to – a scenario and/or annotated notes and/or retrieved text.

Outcomes and evidence requirements

Outcome 1

Apply customising features of software to enhance documents from provided data and by direct composition.

Range types of documents may include but are not limited to – reports, newspaper article, newsletter, flyer, tables, questionnaire, programme; the following customising features must be demonstrated at least once over the three documents collectively - multi-level bullets and numbering; table features; columns; default settings; dictionary additions; glossary and/or autotext entry; evidence of three different types of documents is required.

Evidence requirements

1.1 Text in documents is fit for purpose and the intended audience.

1.2 Multi-level bullets and numbering are customised and used to enhance a document.

1.3 Table features are customised and used to enhance a document.

Range table features may include but are not limited to – cell height, column width, gridlines, borders, alignment, merging and splitting cells, spacing before and after text, tabs, formulae, sorting, shading; evidence of five table features is required.

1.4 Columns are customised and used to enhance a document.

Range column customisation may include but is not limited to – space between columns, column break, enhanced first letter, justification, banner headline, newspaper-style paragraphs; evidence of four column customisations is required.

- 1.5 Default settings are changed and used to enhance a document.
- Range default settings may include but are not limited to – margins, first line indents, page orientation, paragraph formats, printer.
- 1.6 Auto page numbering feature is used on a multi-page document.
- 1.7 A glossary and/or autotext entry is created, stored, and inserted in a document.
- 1.8 Entries are added to the software dictionary.

Outcome 2

Create a document template for a specific purpose.

Range document template must include but is not limited to the use of – auto text, macro file(s), merge fields.

Evidence requirements

- 2.1 A document template for a specific purpose is created and saved.
- Range specific purpose of the document template may include but is not limited to – fax sheet, order form, weekly budget, letterhead, memorandum.

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	
Aloe Vera	Paris
Buying a house	Surf News
Home Loans	Tai Chi
Macadamia Nuts	Toastmasters
NatWest Credit Cards	Vegetables
Night Safety	

Section

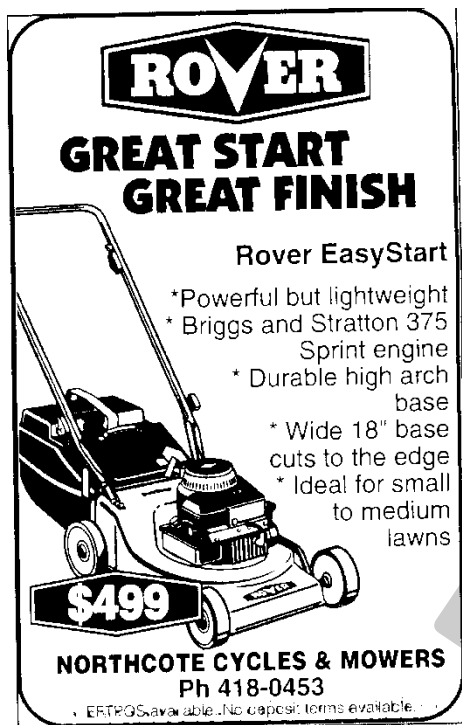
1

Layout Information

Advertisements

Layout

The layout of an advertisement is varied. An advertisement must have an eye-catching layout - it is used to convey information to the reader. They can vary in shape and size depending on the client market, and are usually placed in a limited space (newsletter, newspapers, magazines, bill boards, posters, etc.). Shown below are two examples of different advertisements.



ROVER
**GREAT START
GREAT FINISH**

Rover EasyStart

- * Powerful but lightweight
- * Briggs and Stratton 375 Sprint engine
- * Durable high arch base
- * Wide 18" base cuts to the edge
- * Ideal for small to medium lawns

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STAYSAFE PRODUCTS
9 AKEPIRO ST - MT EDEN

- ★ Collect five different advertisements. On a piece of paper sketch out the layout that has been used for each of the advertisements.

Content

Before starting an advertisement you will need to ask yourself a few questions about the content of the advertisement:

- What is the main topic/goal of the advertisement?
- Are there photos, graphics, relating to the advertisement that need to be included?
- Does the text used relate to the advertisement's message?

Design Checklist

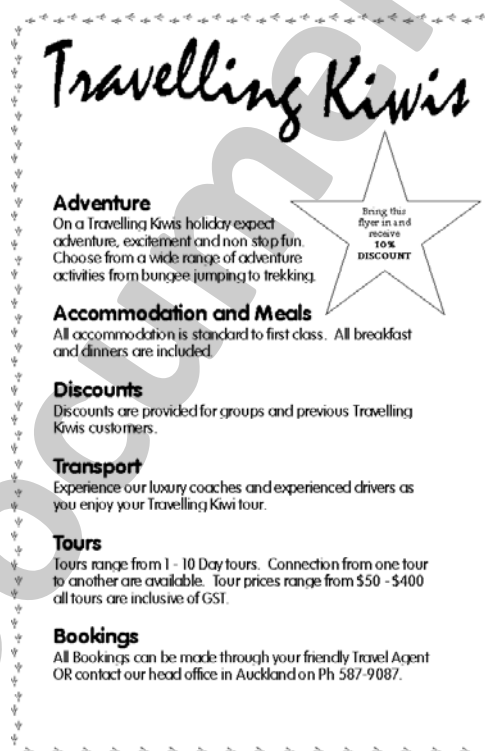
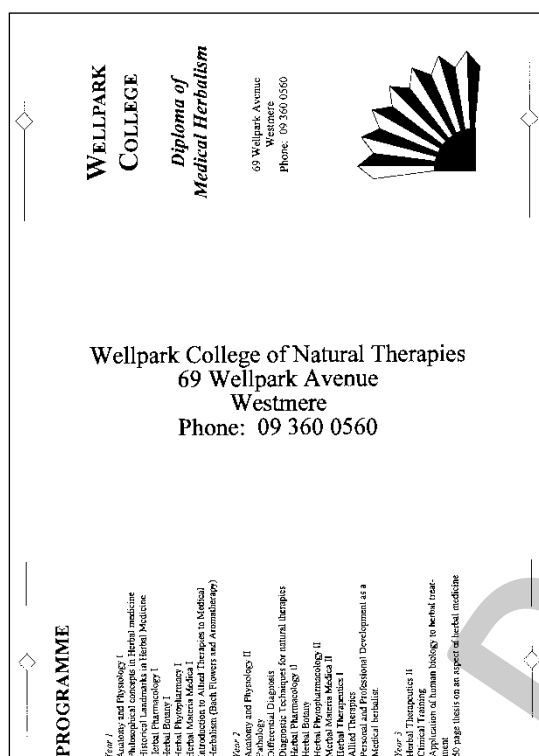
The Design Checklist will allow you to check if your advertisement will communicate effectively to the desired audience.

- ☐ The information in the advertisement is displayed in the correct sequence:
 - Headline (Main topic/subject)
 - Subheading(s) (other relevant secondary information)
- ☐ Is the advertisement conveying the correct image to your audience?
- ☐ Is there enough white space?
- ☐ When you look at the advertisement, do you see the main topic/goal?
- ☐ Is there too much text?
- ☐ Is the type easy to read and spaced appropriately?
- ☐ Can the photos, graphics, charts, and tables used be clearly seen? Are they relevant to the content of the advertisement?
- ☐ Does the advertisement project the correct company/club image and mood?
- ☐ If the advertisement appears in a newsletter, newspaper, brochure, etc., will it stand out?

Brochures/Flyers

Layout

A brochure can use one of several layouts, from a two/three fold panel brochure to a small booklet. A flyer is normally printed on one page as a poster or handout. Shown below are an example of each.



- ★ Collect three different brochures and three different flyers. Sketch out the layout that has been used for each of them.

Content

Before starting a brochure or flyer, ask yourself the following questions:

- Is the main topic/focus clearly defined?
- Are there photos, graphics, charts, tables that need to be included?
- Does the writing style of the brochure or flyer reflect its mood?
- Is it eye-catching - would you read it if it was placed in your letterbox?

Checklist

The checklist will allow you to check if your brochure or flyer will communicate effectively to the desired audience.

- ☐ The information within the brochure or flyer is displayed in the correct sequence:

Brochure

- Cover page
- Headline
- Subheading(s)

Flyer

- Headline
- Main statement

- ☐ Is there enough white space?
- ☐ Does the brochure or flyer look balanced - not too many columns, not too much text?
- ☐ Is the type easy to read and spaced appropriately?
- ☐ Are the headings in the brochure consistent throughout and clearly readable?
- ☐ Can the photos, graphics, charts, tables used be clearly seen? Are they relevant to the content?
- ☐ Is the main headline of the flyer quickly identified and easy to read?
- ☐ Does the flyer target the correct audience and convey the correct mood required?
- ☐ Is the flyer heading eye-catching?

Checklist

The following checklist will allow you to check if your newsletter will communicate effectively to the desired audience.

- ☐ The following information is shown within the newsletter in the order of appearance (the first immediate heading that appears when you view the newsletter to the last item you view):
 - Masthead
 - Headline
 - Subheading(s)
 - Table of Contents (if required/desired)
- ☐ Are you conveying the correct image of the newsletter to your readers?
- ☐ Is there enough white space?
- ☐ Does the newsletter look balanced - not too many columns, not too much text?
- ☐ Is the type easy to read and spaced appropriately?
- ☐ Can the photos, graphics, charts, tables used be clearly seen? Are they relevant to the content?
- ☐ Are the headlines easy to read and do they complement the masthead?
- ☐ Are the subheadings consistent?
- ☐ Are the content, layout, and graphics appropriate for the newsletter's target audience?

Newspaper Articles

Layout

Usually several articles are laid out on a page in a newspaper, together with one or more advertisement. However, one large article can fill an entire page: and sometimes a large article is displayed with some advertisements.

You will notice in the example shown on the next page that the following occurs:

- The page has a heading (not always used).
- Headings for each article vary in size and format.
- Headings are in a sans serif font and text is in a serif font.
- Two articles have a border around them.
- Column width varies.
- One article contains a graphic with a caption.
- The name of the journalist does not appear on every article (but when it does, it is the same format in each instance).
- Prelude text in the first article is in a larger font and is bold.
- Some articles are in bolder typeface than others.
- General text has the following:
 - one space between sentences
 - paragraphs indented two spaces
 - hyphenation is used
 - spacing between paragraphs is not used.
- Two advertisements are included on the page for variation.

100-hour week sparks re-think

By HELEN PRATTLEY

THE North Shore Fire Service is re-evaluating management of overtime after concerns about some firefighters working 100 hours a week.

Questions have been asked in Parliament about the shortage of firefighters on the North Shore. Investigation into the issue has led Fire Service management on the Shore to re-think its

policy on overtime.

Alliance list MP Grant Gillon, based on the North Shore, recently said some Shore firefighters are working 100 hours a week, putting themselves and others in danger through fatigue.

At that time North Shore Deputy Chief Fire Officer Wayne Hight, confirmed staff levels were of concern saying there are 14 vacancies on the Shore.

Mr Gillon has submitted these written questions to Minister of Internal Affairs Jack Elder:

- Is the New Zealand Fire Service fully staffed?
- Have any firefighters been on duty for more than 100 hours in

any week this year? If so, broken down by district, how many and for how many weeks?

- Is it Fire Service policy to have staff on duty for more than 100 hours in any one week? If not, what procedures are in place to prevent these situations occurring, and are these procedures successful?

- What firefighting districts have their full complement of frontline firefighting staff? Of those that do not, how understaffed are they, how long has this been the case and what action is being taken to remedy the situation?

- Are extra firefighters being recruited for the understaffed fire districts in the Auckland region?

If so, what is the time line for these recruitments and what interim measures are in place? If not, why not?

North Shore District Chief Fire Officer Denis O'Donoghue says in response to the parliamentary questions staff spent the equivalent of 40 hours compiling figures dating back three months.

Although answers have not been officially released, Mr O'Donoghue says the exercise has provided an opportunity to re-evaluate management of overtime.

He says figures show several firefighters have worked 100 hours a week. The difficulties have arisen not only from over-

time on the North Shore but outside the district.

Mr O'Donoghue says firefighters have, to date, managed their own overtime and there has not been any way to find out who is doing too much.

A morality issue has been raised by staff with management.

"They don't want to let anybody down," Mr O'Donoghue says. "We are re-evaluating management of overtime with the objective to even out a lot of overtime across all staff because there are some staff who are working none."

He also says people must realise that firefighters spend some of their working hours asleep but still available for emergencies.

No poll on wharf plan

Residents will not be polled on whether they want the Murrays Bay Wharf extended.

The East Coast Bays Community Board voted against polling residents at its final meeting last week before the new board is voted in.

Board member Julia Parfitt later told the *North Shore Times Advertiser* she would like to see a residents' meeting at Outram Hall where the issue could be freely and

openly discussed. Ms Parfitt says there were also concerns over which residents would be polled — those close by or in the wider areas of North Shore.

The wharf is used for fishing, diving and walking. It is also used by schools for Waterwise. It will not be available for commercial use.

The planned 80m wharf extension will cost about \$350,000 and includes safety improvements.

Police check rubbish bin blazes

A spate of rubbish bin fires in the Glenfield area is being investigated by the Glenfield police.

Community Constable Dave Thompson says 10 rubbish bins were set alight at Glenfield College between 11.30pm and midnight on Monday.

Two more rubbish bins at Manuka Primary School and a wheelie bin at Bayview School were also burnt between 5pm Tuesday and 7.30am Wednesday.

Mr Thompson says a slightly scorched book of matches was found at Bayview School. The blue match packet has "Kings Cross Wax Works, Village Centre, Springfield Ave, Kings Cross" written on it.

He urges anyone who saw, or sees, suspicious activity in the area to call the Glenfield Police Station, phone: 443-8039.

In hospital after spill

A man was taken to North Shore Hospital overcome by fumes after a chemical spill in Albany on Monday.

Albany Fire Officer Gary Beer says another man came to the station, on William Pickering Drive, to alert emergency services to the spill at Tarnside Cres, off Bush Rd, about 3.30pm.

The Albany fire appliance, another from East Coast Bays station and a hazardous materials unit from Auckland City went to the scene where workers had already been evacuated.

Mr Beer says the man overcome by fumes was slouching over a car when firefighters arrived.

He had been transferring chemicals from one container to another, went away to do another job and came back to find the substance overflowing, Mr Beer says.

Others, suffering headaches and nausea, were treated at the scene.

Mr Beer says the man who came to the station should have dialled the emergency 111 number instead.



STAND UP: Ann Shears with two of her pieces which are on show at the Pumphouse.

Standing up for colour and art

By SCOTT KARA

After 30 years of painting a North Shore artist is standing her work up rather than hanging it on the wall.

Ann Shears' work brings a room to life.

"They're sort of like children's picture books where the pictures pop up," Mrs Shears says.

Instead of framing the paintings she stands them up like a photo frame. By doing this the

objects within the painting are brought forward and the background recedes and creates a shadow and a definite outline. "It's carrying it on a bit further than your conventional picture frame. You can even hang them as mobiles."

Her subjects include flowers, fruit bowls, animals and small but detailed houses. She says most of the paintings are purely decorative.

"They are the sort of thing you can put in a house in winter and brighten it up."

She says some of the works were done for her grandchildren. Many of the paintings use colours and characters that resemble illustrations from children's books. The "stand up" and "cut out" nature of the paintings look like big bits of jigsaw puzzles.

Mrs Shears' work and many other artists, including Joce Cox, Pardo Jackson and Virginia Angus, can be seen as part of the Country Life exhibition at the Pumphouse until October 13.

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HOME FABRICS
1312

There are many other variations that can be used including –

- Colour.
- Drop capitals at the beginning of the article.
- Pull quotes (text from the article, usually a quotation that is enlarged).
- Text in italics at the end of the article – usually for the reader to find out further information, or just additional information pertaining to the article.
- Shaded boxes or reverse print boxes containing text – eg to emphasize a specific part of an article.
- Bulleted/numbered text can wrap back to the margin on the second line and does not need to be indented.

- ✪ Study three different types of newspapers, eg New Zealand Herald, a local newspaper and a topical newspaper (Business News, community newspaper, Fisherman etc).

Select one page from each newspaper and sketch out the layout that has been used for each page.

Content

Several newspaper articles are usually laid out on each page.

Before laying out a newspaper page ask yourself the following questions on the content of the article, and relate this to the layout on the page:

- What is the main topic/goal of this article?
- How much emphasis does the article need?
- Are there photos and/or graphics relating to the article that need to be included?
- Does any text need to be emphasized?

Design Checklist

The Design Checklist will allow you to check if a newspaper page will communicate effectively to the desired audience.

- ☐ Articles and advertisements are sorted into pages according to the topics they relate to and how they balance each other.
- ☐ The newspaper page shows the correct emphasis for each article, eg most newsy articles are given more emphasis.
- ☐ The page is balanced with articles and advertisements in appropriate proportions.
- ☐ Is there enough white space?
- ☐ When you look at each article, do you see the main topic/goal?
- ☐ Is there enough variation on the page for it to be interesting to the reader?
- ☐ The type is easy to read and spaced appropriately, and follows the guidelines for newspaper articles
 - one space between sentences
 - no spacing between paragraphs
 - two spaces at the beginning of paragraphs
 - use of hyphenation
- ☐ Can I enhance the page with the use of colour (if available), italicised text, drop capitals, pull quotes etc.
- ☐ Can the photos, graphics, charts, tables used be clearly seen? Are they relevant to the content of the articles and advertisements?

Programme

The layout of a programme can vary from A4 size to a folded A5 booklet, three-fold brochure or even A3 paper size. Programmes are used for plays, musicals, concerts, events, conferences, seminars etc. Sometimes only the actual programme is included but additional information can be used such as personal information about the leading actors, viewers comments, etc.

Often text is typed at the left margin and leaders or a right tab is set at the right margin to right align text. A centred column can also be used. The layout of a programme will vary according to the information to be conveyed.



Presentations Workshop	
One Day	
Lakeside Conference Centre	
Conference Room 1	
9:00-9:15am	Welcome, Introductions
9:15-10:30am	Presentation planning
10:30-10:45am	Morning Tea
10:45-12:30pm	Presentation Equipment
12:30-1:30pm	Lunch
1:30-3:00pm	Creating a basic presentation in PowerPoint
3:00-3:15pm	Afternoon Tea
3:15-4:30pm	Presenting your presentation - putting it all together
4:30-5:00pm	Handy tips when presenting, questions
Morning, Afternoon teas and Lunch provided	

Layout Tips

The following will assist you with the layout of the programme:

- Choose the paper size appropriate for the programme – it is preferable to minimize the number of folds if posting the programme.
- Always allow plenty of white space.
- Use a variety of enhancements to add interest to the programme - suitable graphics, fonts, font sizes and effects, WordArt, borders, shading, tables, etc.
- For a concert programme, divide it into two halves - normally before and after intermission. If appropriate have each half on separate pages.
- Ensure that acknowledgements are included where applicable.
- Use leader dots or set a right tab at the right margin to right align text.
- Centre vertically on the page.