

Easy Steps



Unit 24872 (V3)

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

with

Microsoft Word 2010

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

A Cheryl Price Publication

Unit Standard 24872 (Version 3)

Produce documents for a workplace using a computer – Word 2010

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

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

Produce documents for a workplace using a computer (Version 3).

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

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

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

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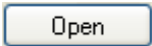





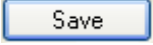
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Downloading Exercise Files

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="1077 465 1380 645" data-label="Image"> </div>
4	Click on 
5	Click on US 24872
6	Under the Exercise Files heading click on the underlined blue hyperlink, ie Book Exercise Files – V3 Office 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  Save as then click on the Documents folder shown at the right. Click on  <div data-bbox="1042 1608 1345 1742" data-label="Image"> </div>
9	Click on Open Folder which will display My Documents folder. Right click on the zipped exercise file and select Extract All. Click on Extract. A folder will be created containing the exercise files.

Exercise Files used in this book

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

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

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NZQA Outcomes and Evidence Requirements

Unit Standard 24872 (Version 3)

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

Purpose	People credited with this unit standard are able to produce workplace documents using a computer; use email in a workplace to produce and send documents; and explain the advantages and disadvantages of using email in a workplace.
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Classification	Computing > Generic Computing
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Available grade	Achieved
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Explanatory notes

- 1 This standard is intended to be used for the assessment of candidates who have previous experience with computers and are able to use specific programs to produce documents relevant to a specified workplace context. It is expected that the assessment would specify the workplace context and the requirements for that workplace.
- 2 The vocabulary used within the document must be appropriate to the context of the specified workplace and the document produced.
- 3 Definitions
Workplace policies and procedures refer to both documented and oral instructions about workplace expectations; these must include but are not limited to – customer service delivery, legislation, organisational structure, business objectives.
Email etiquette is the commonly used conventions including but not limited to – writing concisely, use of capitals, use of cc and bcc, confidentiality.
- 4 Legislation relevant to this unit standard includes but is not limited to;
Copyright Act 1994,
Copyright (New Technologies) Amendment Act 2008
Official Information Act 1982,
Privacy Act 1993
Protected Disclosures Act 2000,
Unsolicited Electronic Messages Act 2007;
and their subsequent amendments.
- 5 An assessment resource to support computing unit standards (levels 1 to 4) can be found on the NZQA website at www.nzqa.govt.nz/asm.

Outcomes and evidence requirements

Outcome 1

Produce workplace documents using a computer.

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

Evidence requirements

- 1.1 The document is relevant to and consistent with the conventions of the context and situation.
- 1.2 The document is produced in accordance with the workplace policies and procedures.
- 1.3 The document is checked for correct spelling and grammar using spell check function set to New Zealand English.
- 1.4 The document is manually checked for errors not picked up by spell check function.
- 1.5 The document is saved according to workplace policies and procedures and is produced as a printed hard copy.

Range may include but is not limited to – naming files, assigning to shared drive, setting printer preferences.

Outcome 2

Use email in a workplace to produce and send documents.

Evidence requirements

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

Range may include but is not limited to – customer enquiries, bookings, business-to-business correspondence, inter-office correspondence.
Evidence is required for a minimum of three separate messages.

- 2.2 Message attachments are sent in accordance with email etiquette and workplace policies and procedures.

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

Outcome 3

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

Evidence requirements

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

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

Planned review date	31 December 2016
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Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	23 April 2008	31 December 2013
Rollover and Revision	2	18 February 2011	31 December 2015
Rollover and Revision	3	19 September 2013	N/A

Consent and Moderation Requirements (CMR) reference	0226
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This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

Section

1

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

Learning Outcomes

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

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

Producing Appropriate Documents

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

Document types that you may come across include:

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

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

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

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



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

Standard Formats

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

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

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

Why do organisations use standard formats?

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

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

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

Example 1 – Condition of Vehicle Reports by Memo

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

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

Example 2 – Giving Information by Letter

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

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

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

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

Website

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Several libraries throughout New Zealand are now stocking hard copies of our Easy Way and Learning Series books. Please contact your local library if you are interested in viewing or using these.

Click on one of the following links to view that range of products:

[NZQA Unit Standards Resources](#) | [Easy Way Books](#) | [Learning Series Books](#)

Product Range Descriptions - [click here to download](#)

Unit Standard Books and Assessments Summary - [click here to download](#)

NEWSLETTER 1 September 2012 - [click here to download](#)

Our newsletter contains progress information on unit standards books and assessments together with additional information, and also includes tips on Microsoft programs.

Unit Standards Books Price List - 31 August 2012 - [click here to download](#)

Unit Standards Assessments Price List - 28 August 2012 - [click here to download](#)

Easy Way Books Price List - 28 August 2012 - [click here to download](#)

1 September - Recently available

- Easy Way Keyboarding - Word 2010
- Learning MYOB AccountRight Standard 2011.1
- Unit Standard 26768 v1 book - MYOB AccountRight Standard 2011.1
- Unit Standard 26768 v1 assessment
- Unit Standard 4252 v5 book (Produce a targeted resume)
- Unit Standard 123 v6 book

Business Letter



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16 October 2014

Mrs Jane Cooke
8 Chester Avenue
Albany
Auckland 0632

Dear Mrs Cooke

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

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

The Learning Series books combine three levels into one book.

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

Please contact me again if I can assist you further.

Yours sincerely

Cheryl Price
Director

Enc

Inter-office Memorandum



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Memorandum

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

Hi All

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

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

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

Jennifer

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

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

Facsimile



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Facsimile

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

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

4 reams photocopy paper

Packet of 4 highlighter pens (various colours)

3 Eastlight folders

100 pack DL Envelopes

Many thanks.

Jennifer Anderson

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

PO Box 187 Matakana, Auckland 0948
Website: www.cherylprice.co.nz
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Invoice



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INVOICE

GST NO: 62-293-861

DATE: 23 October, 2014

INVOICE: 1123

Invoice To:
Omaha College
Shamrock Crescent
Omaha
Auckland 0948

School Contact: Mary

ORDER NO: 3490

Comments or Special Instructions:

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

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

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Workplace Policies and Procedures

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

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

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

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

Where to find information on workplace policies and procedures

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

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



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

Document Accuracy

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

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

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

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

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

Proofing tools – page 92
Using the Spelling and Grammar function – page 93
Spell check and grammar language – page 95
Changing the language setting – page 95
Spelling and grammar function options – page 96

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

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



Proof reading

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

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



Effective proof reading methods:

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

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

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

Checking document layout:

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

Check that:

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



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

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

Open punctuation

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

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