

Easy Steps



Unit 112 - 108 (V6)

**Produce business or organisational information
using word processing functions;
Apply text processing skills to produce
business documents**

with

Microsoft Word 2013

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

A Cheryl Price Publication

Unit Standard 112, 108 (Version 6)

**Produce business or organisational information using word processing functions;
Apply text processing skills to produce business documents - Word 2013**

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

- Unit Standard 112 - BUSINESS INFORMATION PROCESSING (Level 3, Credit 5)
Produce business or organisational information using word processing functions
- Unit Standard 108 - BUSINESS INFORMATION PROCESSING (Level 3, Credit 5)
Apply text processing skills to produce business documents



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

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

Retrievable exercise files are used with this book and listed on page xviii. 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 xix.

This book has been written using Microsoft Word 2013 with Windows 8.1

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Introduction

Welcome to Unit Standards 112 v6 Produce business or organisational information using word processing functions and 108 v6 Apply text processing skills to produce business documents with Microsoft Word 2013.

This book has been written using Microsoft Word 2013 with Windows 8.1. (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 xii to xiv. 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 xviii and instructions for downloading these files from our web site are included on page xix.

What you will learn

In this course for US112 you will learn how to –

- produce business or organisational information using word processing functions - documents to include – legal, financial and technical documents, formal reports, formal meeting documents, promotional brochures, forms
- apply formatting and display options
- create tables, and mail merge documents
- use templates and sorting options
- use folders to organise and store files
- identify print options and printing techniques

For US108 you will learn how to –

- apply text processing skills to produce business documents
- compose business documents from annotated drafts
- produce business documents within specified time frames
- use text processing conventions and features to produce business documents

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).

Practice Assessments 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.

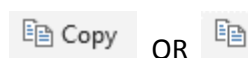
forecast
= to
calculate a
future
result

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.

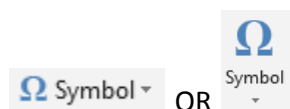
Different Word buttons

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.



Revision

This appears at the end of each section and contains theory revision questions relating to features learnt in that section.



Practice Assessment


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

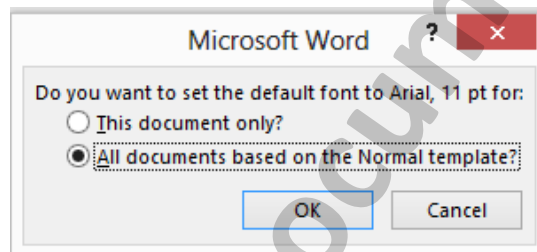
Changing Defaults

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:

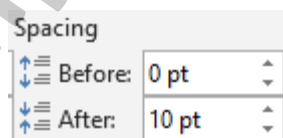
- 1 Click on the Font Dialog Box Launcher  which will display the Font dialog box.
- 2 Change the Font: to Arial and the Size: to 11 pt.
- 3 Click on **Set As Default**.
- 4 Ensure the following option is selected for the font to be applied to *All documents based on the Normal template*.




- 5 Click on OK.

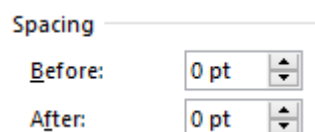
Spacing

- 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.



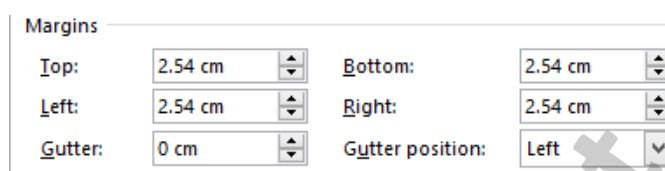
- 3 Click on **Set As Default**.
- 4 Ensure *All documents based on the Normal template* is selected then click on OK.

Margins

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

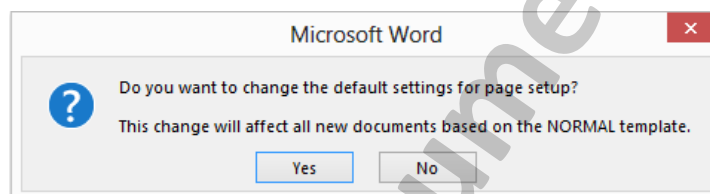
If margins are displayed as 3.17 cm change them as follows. (If they have been changed to those shown below click on Cancel.)

- 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 **Set As Default**.



- 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 **Advanced** 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 .

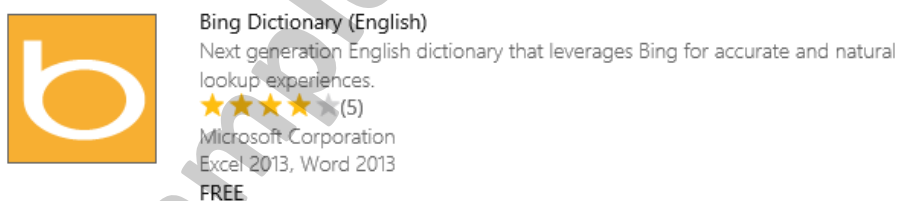
- 2 In the Apps for Office dialog box click on  which will take you to the Microsoft Apps Store.

(If other apps have been installed you need to click on  .

- 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 .

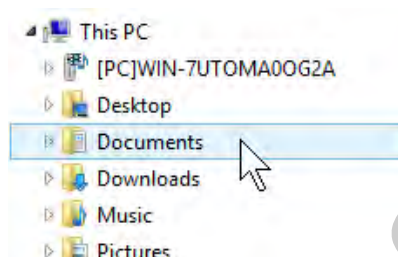


The Bing Dictionary will now show on the  button and will be used for spelling and grammar checking, synonyms and thesaurus.

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 the Documents folder within This PC as the default folder. This folder is shown below which is the shortcut for the actual path name of C:\Users\User Name\Documents. This means that files you open and save will be on your hard drive.



Use the following instructions to specify the Documents folder 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.

- ☒ 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...

- 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 OK.



If you wish to open and save files to OneDrive (ie the cloud) use instructions on the next page. If you have Windows 8, or have updated to Windows 8.1 from Windows 8, SkyDrive may be displayed instead of OneDrive but is essentially the same.

OneDrive

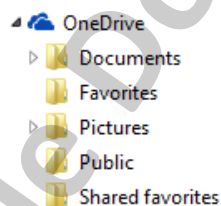
OneDrive is a cloud storage application from Microsoft. It is one of the major online file storage options competing with Dropbox and Google Drive.



Because files are stored “in the cloud” (in addition to your hard drive) it means that you can access those files from anywhere in the world because you will always have access to the OneDrive application and your files. You do however need an Internet connection for the files to be updated from your hard drive to OneDrive.



Saving to OneDrive

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



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

OneDrive as the Default File Location

Use the following instructions if you wish to specify OneDrive 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 C:\Users\User Name\OneDrive\Documents folder is displayed as the Default local file location as shown on the next page. (You may need to retype the location)
- 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\OneDrive\Documents

Browse...

6 Click on OK.

OneDrive Website

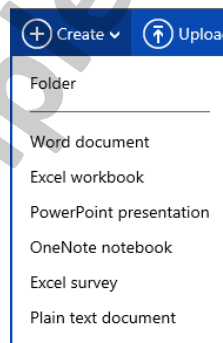
You can log in to the OneDrive website using your web browser with your login name and password.

The website is www.OneDrive.live.com.



You can upload photos and use files and share files.

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



Sharing Files

From within Word 2013 you can save files to OneDrive (usually to the Documents folder) and then share those files. You can then click on the **FILE** tab, on **Share** and invite people to share files in OneDrive.

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

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

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)




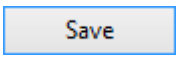

Name of Files	
Achieving Consistency	Merge-Data
Adelaide Shopping	Merge-Main
Banking	Motor Homes
Beads, Seeds and Shells	Mouse
Beauty Care	Numbering Exercise
Bertrams Letterhead	Numbering
Book Sales	Otaki Tramping Club
Cairns	Pacific Hotels Letterhead
Canterbury Tours	Paris in the late 19 th Century
Care of a New Puppy	Parkvale Letterhead
Caring for your Carpet	Parkvale Memo
Cashflow	Pinetree Invoice
Cherry Venture	Pinetree Letterhead
China	Planning a Wedding
Choosing a Cat	Posture
Costello	Proofreading-test
Credit Note	Rafting
Departments	Rata Motor Camp Ltd Newsletter
Dining Out	Sales
Dinos	Send-a-Basket-test
Dr Bradley Letterhead	Shareholders Report – 2014
EAL Letterhead	Show Jumping
EAL Memo	Sort List
Email List	Sorting Assessment
Email	Sorting Exercises
Ergonomics1	Sparkling Pools
FaxForm	Statement
Fitness Equipment	Suncare
Formats-test	Table Sorting Exercises
Good Food News	Tables-test
Healthcare Insurance	Tasty Icecream Letterhead
Holland Sightseeing	Toastmasters Flyer
Invoice	Toastmasters
Italy	Tour and Event
Jury Service	Travel Confirmation
Managing a Mortgage	Travel Itinerary
Mclvers	Triathlon
MemoForm	Xmas Gifts

Downloading Exercise Files

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



For the purposes of this book we have specified Exercise files to be downloaded to the Documents folder within This PC which is the shortcut for the actual pathname of C:\Users\User Name\Documents. This is where files will be opened from and saved to.

1	In the address bar of Internet Explorer, 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="1061 672 1364 862"> </div>
4	Click on 
5	Click on US 112-108
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</p> <p>b Change file name to <i>US112-108 v6 Excel 2013 Book Exercise Files</i>.</p> <p>c Click on the Documents folder shown below.</p> <div data-bbox="654 1400 1029 1624"> </div> <div data-bbox="375 1646 1165 1736">  <p>The Documents folder under This PC is the shortcut for C:\Users\User Name\Documents</p> </div> <p>d 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 112 (Version 6)

Title	Produce business or organisational information using word processing functions		
Level	3	Credits	5

Purpose	People credited with this unit standard are able to: apply word processing features and functions to produce business or organisational information; and apply file management and printing techniques to manage document production.
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Classification	Business Administration > Business Information Processing
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Available grade	Achieved
------------------------	----------

Entry information	
Recommended skills and knowledge	Unit 111, <i>Use a word processor to produce documents for a business or organisation.</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 Logical structures such as folders must be used to organise and store files according to business or organisational requirements.
- 3 Business or organisational information requires the production of six different types of 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.

Outcomes and evidence requirements

Outcome 1

Apply word processing features and functions to produce business or organisational information.

Evidence requirements

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

Range features include but are not limited to – page numbering options, page and section breaks, page layout, header and footer features, font selection and size, text format, use of lines, boxes, borders, alignment, columns including hyphenation, bullets and numbering.

- 1.2 A template is used and variable data is inserted in accordance with the output required.

- 1.3 A mail merge is created in accordance with the output required.

- 1.4 Sorting options are applied in accordance with the output required.

- 1.5 Tables are produced incorporating multiple line headings, ruled and non-ruled columns, and a range of column widths in accordance with the output required.

Outcome 2

Apply file management and printing techniques to manage document production.

Evidence requirements

- 2.1 Access to word processing files is controlled through the implementation of file management system procedures.

Range password protection, login procedures, document storage, and file back up and/or copying procedures; evidence of three procedures is required.

- 2.2 The creation of folders and movement between them are consistent with file management system procedures.

- 2.3 File types are differentiated in accordance with file management system procedures.

Range document, template.

- 2.4 Print options are identified and used in accordance with system features and output required.
- Range may include but are not limited to – selected text, single page, multiple pages, entire document, print preview, duplex printing; evidence of three is required.
- 2.5 Printer capability and settings are identified and, where available, an alternative printer is selected.
- 2.6 Paper loading and print cartridge changing operations are carried out in accordance with equipment guidelines and organisational requirements.

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>.

Unit Standard 108 Version 6

Title	Apply text processing skills to produce business documents		
Level	3	Credits	5

Purpose	People credited with this unit standard are able to apply text processing skills to produce business documents.
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Classification	Business Administration > Business Information Processing
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Available grade	Achieved
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Entry information	
Recommended skills and knowledge	Unit 107, <i>Apply text processing skills to produce communications in a business or organisational context.</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 **Definition**
Text processing conventions refer to accepted practices of display for page layout, font selection and size, spacing, use of lines, boxes and borders, and white space. Conventions used must produce documents that are fit for their intended use and meet organisational style requirements.
- 3 Evidence of text processing skills must include the following features which may be demonstrated once over all five business documents rather than in each – amendments made from both printed and hand-written annotations, use of calculations, business terms and abbreviations, numbers, columns, tables, simple 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.

Outcomes and evidence requirements

Outcome 1

Apply text processing skills to produce business documents.

Range business documents may include but are not limited to – business correspondence, financial reports, meeting documents, formal reports, travel documents, promotional and advertising material, entertainment and social information, forms; evidence is required for five different types of business documents.

Evidence requirements

- 1.1 Spelling, grammar, vocabulary, and punctuation are consistent with the nature and purpose of the business documents required.
- 1.2 Page layout, format and display of business documents are consistent with the output required, and meet organisational style requirements.
- 1.3 Business documents are composed from annotated drafts containing extensive editorial amendments, in accordance with information provided and output required.
- 1.4 Information is listed in sequence in accordance with the information provided and output required.
- Range** chronological, alphabetical, numerical.
- 1.5 Business documents are processed and presented within a specified time frame in accordance with information provided and output required.
- 1.6 Business documents are produced in accordance with text processing conventions.

Planned review date	31 December 2015
----------------------------	------------------

Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	30 March 1993	December 2011
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This AMAP can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

Formatting and Layout of Documents

Bullets and Numbering

Sorting Lists and Paragraphs

File Management



Learning Outcomes

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

- ☐ Format text
- ☐ Lay out documents appropriately
- ☐ Use Bullets and Numbering options
- ☐ Sort lists and paragraphs alphabetically, numerically, chronologically
- ☐ Create, use and delete folders
- ☐ Copy, move, rename and delete files
- ☐ Differentiate between program and document files



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.

Aligning Text
Bulleted Paragraphs
Document
File Extensions
Folders
Fonts
Landscape

Multilevel List
Navigation Pane
Numbered Paragraphs
OpenType Font
Path Names
Point Size
Portrait

Recycle Bin
Sort
Template
Text Effects
TrueType Font
USB Drive

Formatting Text

formatted
= the way in which something is presented or displayed.



Text is formatted when you want to change the style, increase/decrease the size, colour, apply special effects, change alignment and spacing etc.

Two examples of font and font sizes are:

This is BrushScript 16 pt font

This is Arial 14 pt font

Fonts

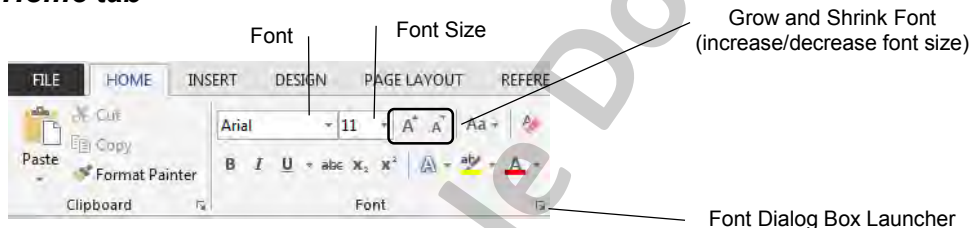
A font is a style of type. **Fonts** can be increased or decreased in size (known as point size or pt). Windows has a variety of “**OpenType**” and “**TrueType**” fonts that will print with all printers (they have  and  next to them on the drop-down list on the Home tab).

In Word it is quicker to type text, then select it and apply formatting, rather than applying formats as you type.

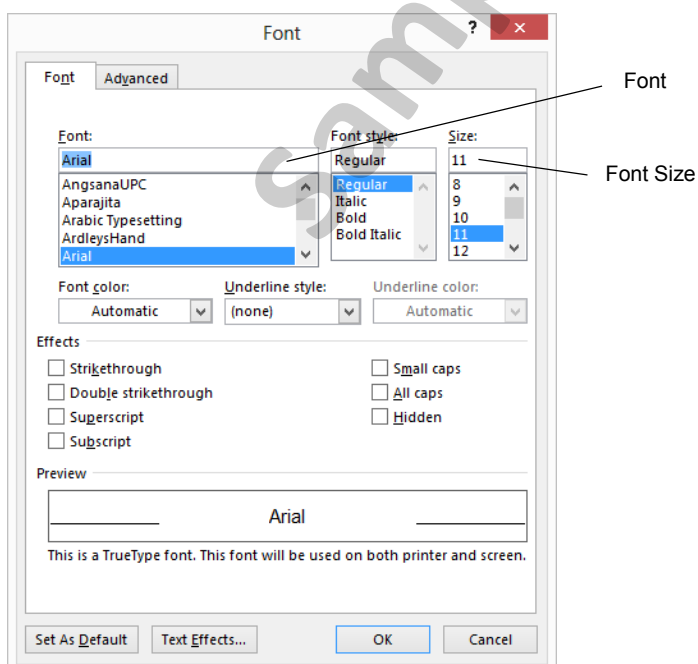
To apply character formatting to a single word simply click in cursor anywhere within it and formatting will be applied to the whole word (ie it is not necessary to select the entire word).

Once you have selected text, you can apply formatting using either –

Home tab



Font dialog box



Click on the Font Dialog Box Launcher

Font

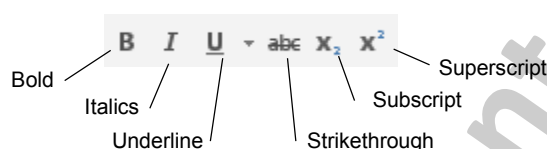
in the Font group on the Home tab to display the Font dialog box.


Shortcut Keys

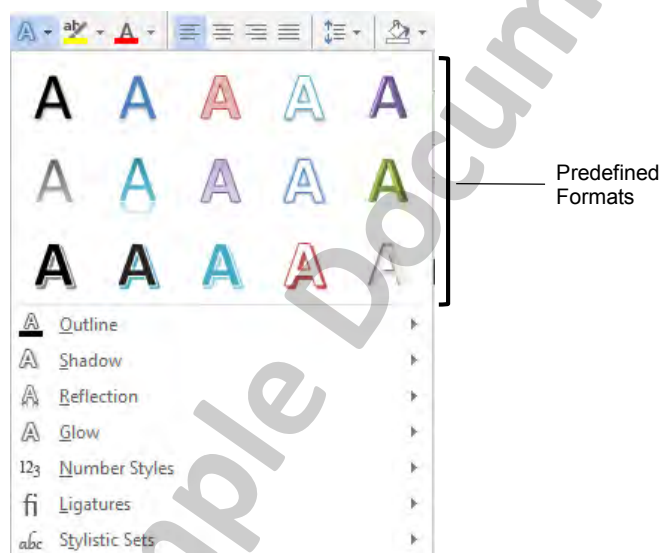
Shortcut Key	Function
Ctrl D	Displays the Font dialog box
Ctrl]	Increases font size to next point size
Ctrl [Decrease font size to previous point size
Ctrl Shift >	Increases font size to next <i>listed</i> point size
Ctrl Shift <	Decrease font size to previous <i>listed</i> point size

Text Effects

Simple **text effects** such as **bold**, *italic*, underline, ~~strikethrough~~, font colour, subscript and superscript can be applied using the Home tab as shown below.








More elaborate text formatting can be applied using the Text Effects and Typography button .



Text can be selected and then from the Text Effects and Typography button you can choose a predefined format or apply your own by selecting options from the menus at the bottom of the button, ie Outline, Shadow, Reflection, Glow etc.

Alignment

Aligning text horizontally means to align it between the left and right margins. You can align text by clicking on the alignment buttons in the Paragraph group on the Home tab OR by using the shortcut keys (listed below) OR by clicking on the Paragraph Font Dialog Box Launcher on the Home tab and selecting relevant options from the Alignment .

Button	Name	Shortcut Key	Applies
	Align Left	Ctrl L	Left alignment
	Center	Ctrl E	Center alignment
	Align Right	Ctrl R	Right alignment
	Justify	Ctrl J	Justified alignment

Headings and Layout

There are several ways of keying in 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.



You would not use a block heading at the left margin and then use a centred heading - a centred heading is usually a priority heading.

Font size headings

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 type (called a “font”). This is a preferable method of emphasising 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).

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 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

```

Third Heading

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

In advertisements, flyers etc you can vary the display. A variety of fonts, font sizes, enhancements can be used but it takes practice to produce these documents. Study newspapers and magazines for good ideas. It is wise to plan such a publication (sketch it out on paper first) and take the following into account:

- **Proportion**
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 approximately to the paper size, ie **portrait/landscape**.
- **Variety**
In size, alignment, font, style - remember that overuse can lead to chaos.
- **Sequence**
The eye flows easily through the text/graphics and from one part of the layout to another.
- **Unity**
The overall artistic design of the completed work.

Font Examples:

THIS IS 22 PT TIMES NEW ROMAN FONT

THIS IS 20 PT ALGERIAN FONT

THIS IS 18 PT ARIAL FONT



This is 16 pt Cooper Black font

THIS IS 14 PT BRUSH SCRIPT FONT

This is 12 pt Bookman Old Style Font




This is 10 pt Wide Latin Font

Remember you can use the following shortcut keys to visually increase/decrease the font size of selected text:

- | | |
|--------------|---|
| Ctrl] | to increase by one point size |
| Ctrl [| to decrease by one point size |
| Ctrl Shift > | to increase by point sizes shown on the Font Size  |
| Ctrl Shift < | to decrease by point sizes shown on the Font Size  |

Expanded/Condensed Headings

Headings can be expanded by using character spacing in Word as follows, eg **Heading**


- 1 Select the text to be expanded then click on the Font Dialog Box Launcher . Click on the Advanced tab.
- 2 Click on the Spacing  and select Expanded.
- 3 Click on the By  and select measurement for expansion, eg 1 pt.
- 4 Click on OK. (You may wish to insert extra spacing between words.)

Layout Concepts

Experimentation

Be willing to experiment

Design excellence is often the result of trial and error and professional graphic designers rarely solve design problems on their first attempt. Often they spend a considerable amount of time sketching out solutions that might work.

Word processing programs permit you to follow this same procedure - you can save your attempts with different file names or use the Undo button  until you arrive at the ideal layout.

Appropriateness

Be flexible in applying the rules that follow

Success in graphic communications is based on appropriately relating the elements of graphic design to their surroundings. Appropriateness is based on proportion. The size of any graphic element should be based on the size of the page, the graphic elements that surround it, and the emphasis you want it to receive.

Appropriateness also relates to the content of the publication and the people who will be reading it, eg an advertisement for a clothing sale would have a totally different appearance than a company report.

Balance

Avoid Static Balance

Balance can lead to boredom and interrupted eye movement. Unequal left/right or top/bottom balance helps provide movement and create interest to the reader.

Proofreading

Check for text and layout mistakes

Use the spell check facility if available. Get someone else to review it. As well as proofreading text, check for graphic consistency, eg ensure that line elements are even, headings are in the correct font size etc.

Typography

Typography is the design of the characters that make up text and display type (headings, subheadings, body text, etc) and the way they are configured on the page. Typography influences the appearance of your document more than any other single visual element.

The typeface you select can assist, or hinder, the readability of your document.

Type can add personality and expressiveness to your document.

Some typefaces are formal:

The Grand Hotel

and others are informal;

Mr and Mrs R J Brown cordially invite

some are interesting;

Mid-winter Christmas Dinner

some are serious.

This is a good reading font.

There are two categories of type - **serif** and **sans serif**.

Serif type has “curly” parts at the top and bottom of characters: This is serif type

Sans serif type is plain and ideal for headings and subheadings: This is sans serif type

Do not mix too many typefaces in a document - usually only two in commercial documents. (You can be more creative in advertisements or graphic publications.)

Consistency

The golden rule in the layout of any document is consistency, eg

- same font and font size used for the same heading level, eg Arial 14 pt, bold for subheadings.
- punctuation style
- use of capitals
- paragraph styles
- spacing
- paragraph numbering/bullet styles
- alignment
- margins and white space

Sometimes spacing before and after headings is adjusted slightly so that text can fit on a page. This does not usually detract from the appearance of the document. (You can use the Before and After options on the [Format] Paragraph menu to adjust spacing.)

Major Headings

Use a font and font size for a major heading so it will inform the reader of the focus of the page/document. Headings should be large enough for easy reading and can be centred, left aligned, or right aligned. There is usually only one major heading but sometimes there is a major sub-heading also (which should be in a smaller font size).

Subheadings

Subheadings are a transition from the major heading to body text

Subheadings lead readers from the major heading into the body text and make it easy for readers to locate information. Subheadings are usually in bold and in a smaller font size than the major heading(s).

Lists

Numbered and bulleted lists can have less spacing between items and more above and below the list.

Borders and Lines

Borders and lines can be added to documents - again spacing must be consistent - if you insert 12 pt (or one Enter) before one line then the next line must have the same amount of spacing used.

Spacing

Variations can occur, eg the spacing between the bulleted list on the previous page could be reduced to 3 or 4 pt if it was necessary to fit text on a page alternatively, spacing after subheadings could be changed to 6 pt etc.

Punctuation and Capitalisation

It is important that the punctuation used is consistent throughout. Look at the font size measurement on these two pages. This is typed as 12 pt (with a space between 12 and pt). This is acceptable because it is consistent.

Notice that we have used a comma before *ie* and *eg* and no full stop after.

Notice that each word in the subheading has an initial capital letter (small words such as *and* would be in lower case), and that the third level headings have only the first word capitalised.

Paragraphs and Alignment


This document has block style paragraphs throughout and justified alignment (ie left and right margins are even, not ragged).

Margins and White Space

A wider left margin is acceptable on single sided documents and inside margins can be wider on double sided documents. Use of white space makes the document easier to read.

Tools for Consistency

The following Word features can be used to ensure consistency throughout documents.

- **Format Painter**  (Format text, select then double click on Format Painter then select other headings. Press Esc to turn off).
- **Repeat key** (F4). When formatting has been applied (manual or with styles) select other headings and press F4 to repeat.



Only the *last* formatting will be repeated.

Document Content

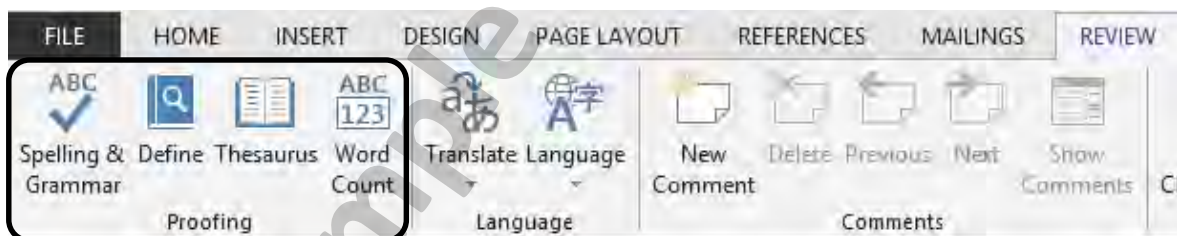
convey
= deliver

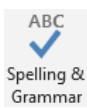
A document is used to convey information to a reader. If the information is incorrect or poorly worded the reader could interpret the document incorrectly. When you check your document consider the following:


- Is the information contained in the document correct – correct names and addresses, dates, times, place names, people's names, etc.
- Does the language of the document fit the reader? For example - if technical descriptive words are used in a document for a person who does not have a background in the topic it will appear overwhelming and confusing to the reader.
- Have you spell checked the document? Incorrect words can confuse a reader and appear unprofessional.
- Have you read through the entire document, reading each word and taking it in? Does each sentence sound correct and have correct grammatical rules 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.


When you analyse the content of each document you should consider the nature and purpose of the document. What is it being used for? Will it be appropriate for the business or organisation to send this document out to clients or to be used in-house for staff?

The Proofing group on the **REVIEW** tab has some great tools that can help you ensure that the content of your document is correct.



Spelling & Grammar – click on  to check the entire document for errors – REMEMBER not all spelling and grammar errors will be picked up by Word. See the next page.

Define – click on  to search for the meaning of a word. This feature gives you an understanding of a word and allows you to check if it is appropriate.

Thesaurus – click on  to look up words with a similar meaning. This feature allows you to change a word to one that is more appropriate.

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*, or *ensure* instead of *insure*.

As well as proof-reading text, check for layout consistency, eg

- ensure that margins and horizontal alignment is correct.
- headings are graded and in the correct font and size etc. Also ensure that headings are consistent throughout.
- Punctuation is correct.
- Any edits required have been done according to the amendments indicated.
- Numbering is sequential, ie paragraph and page numbering

Organisations do not want errors in correspondence. Ensure that you proof-read all documents.



EXERCISE 1

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

- Proof-read Susan’s document and check it against the original document at the left. In the space provided write down anything that Susan has missed. (You can use the Thesaurus to look up meanings of words you are not sure of, eg *contact* and *contract*.)

Omaha Surgery Ltd

Notice to Patients

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

Please sign and return in the prepaid envelope.

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

OMAHA SURGERY LTD

Notice to Patients

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

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

Please sign and return in the prepaid envelope.

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

Punctuation and Vocabulary Summary

(Please refer to the Appendix, pages 299 to 309 for more detailed information.)

Description	Incorrect Example	Correct Example
Punctuation, eg use of commas, full-stops, exclamation marks etc must be appropriate. Ensure that punctuation is used for the correct context	Woman, without her man, is useless. Its been a great day. The boy's race was excellent.	<i>Could be:</i> Woman - without her, man is useless. <i>Should be:</i> It's been a great day. The boys' race was excellent.
Spacing after punctuation marks must be accurate and consistent. Generally, one space after a comma and two after all other punctuation marks.	Great news! Ive left my job in London . In each town– Paris and Rome – were going to stay in youth hostels.	Great news! I've left my job in London. In each town – Paris and Rome – we're going to stay in youth hostels.
Slang, casual or "texting" language should not be used.	Giddaye Mate. Cld you pls c me 2day.	Dear James or Hi James (if email) Could you please see me today.
Avoid the use of unnecessary words.	Please repeat that exercise again.	Please repeat that exercise.
Capital letters must be used correctly (not for names of plants or animals, occupations, points of the compass, mother, father etc - except if used instead of the actual name).	The carpenter built the house in Spring. The prime minister will meet you tomorrow. Hey dad, wait for me.	The carpenter built the house in spring. The Prime Minister will meet with you tomorrow. Hey Dad, wait for me.
Correct use of words and figures – in general, use figures for numbers over nine, and fractions. (If a sentence has a figure over 10 then use numbers in all instances.)	There are 20 exits but only seven of them are marked. He had 8 golf balls but only three were brand new.	There are 20 exits but only 7 of them are marked. He had eight golf balls but only three were brand new.
Try to avoid repetition of the same word - learn other meanings. Right-click on a word, select Synonyms then select a word from the list.	There is generally a lunch break at 12 noon, a short break for afternoon tea and then generally staff finish work at 5 pm.	You could right-click on the word generally , select Synonyms then select a word from the list displayed, eg usually .
Use the Thesaurus, Shift F7, for words commonly confused to ensure you use the correct option.	You should practice your typing every day. The name of the school principle is Mrs Jones.	You should practise your typing every day. The name of the school principal is Mrs Jones.
Ensure that the vocabulary and terminology used is in keeping with the context of the business for which you are working, eg in a professional office - lawyers, accountants - a more formal language is used.	Do not use the following greeting in an email: Hi Susan	Use a formal greeting, eg Dear Susan (or Mrs Smith if the person is not known to the sender).
... and very importantly – use the spelling and grammar feature, and proof-read your work.		

Bulleted, Numbered and Multilevel List Paragraphs

Bulleted Paragraphs

Bulleted paragraphs are usually a list of topics in no precise order. A bullet or symbol appears at the left margin with the paragraph indented. If a bulleted paragraph is moved or deleted the bullets remain (no change occurs). An example of bulleted paragraphs is shown below.

Bulleted Paragraphs

Bulleted paragraphs are used to list items or describe features/objects.

- To use bullets just click on the Bullets button in the Paragraph group. This will apply a bullet to the current paragraph.
- Text is typed normally. Each time you press Enter a new bullet will appear. To turn bullets off just click on the Bullets button.
- Bullets can be changed to a different style, eg arrows, boxes, stars, etc.

Numbered Paragraphs

Numbered paragraphs are paragraphs numbered in a sequential order, eg 1, 2, 3, or A, B, C, etc. These paragraphs are typically listed in a logical order for a specific purpose, eg a list of instructions. An example of numbered paragraphs is shown below.

Numbered Paragraphs

This is an example of numbered paragraphs.

- 1 To start paragraph numbering click on the Numbering button in the Paragraph group.
- 2 Type each paragraph as you would normally. Each time you press Enter you will move to a new line and a new paragraph number will appear.
- 3 Once you have typed your last numbered paragraph and pressed Enter, click on the Numbering button to turn off numbering.

If you move or delete a numbered paragraph the numbering will automatically update.

Multilevel List Paragraphs

Multilevel List is used when you have a list within a list, eg when you have paragraphs explaining each step that are numbered, then instructions for various steps within the list. You can have up to six levels within a numbered list. Each time there is a new level the list is indented. An example of a multilevel list is shown below. (Multilevel List numbering is covered in Unit 113.)

Multilevel List Paragraphs

This is an example of multilevel list paragraphs.

- 1 Bullets and numbering can be inserted by using the Bullets button and the Numbering button in the Paragraph group.
 - a The numbering style can be changed by clicking on the Numbering down arrow and selecting an option from the Numbering Library.
 - b The bullet style can be changed by clicking on the Bullets down arrow and selecting an option from the Bullet Library.
- 2 When the Numbering button is used and numbered paragraphs are moved, the numbers will readjust.

The same process of applying and changing numbered paragraphs also applies for bulleted paragraphs in Word 2013. (Full step-by-step instructions follow for numbering and briefer instructions for bullets which follow similar concepts.)