

# Easy Steps



## **Unit 112 (v6)**

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

*with*

**Microsoft Word 2013**

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

*A Cheryl Price Publication*

## **Unit Standard 112 (Version 6)**

### **Produce business or organisational information using word processing functions - Word 2013**

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

Unit Standard 112 (v6) - BUSINESS INFORMATION PROCESSING (Level 3, Credit 5)

Produce business or organisational information using word processing functions



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

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

Retrievable exercise files are used with this book and listed on page xvi. These are available as a free download from our web site at [www.cherylprice.co.nz](http://www.cherylprice.co.nz). Instructions for downloading the exercises are included on page xvii.

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

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

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**Cherylprice.co.nz**  
For excellence in training resources

PO Box 187  
Matakana  
Auckland 0948

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

### **Web address:**

[www.cherylprice.co.nz](http://www.cherylprice.co.nz)

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Sample Document



# Introduction

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Welcome to Unit Standard 112 v6 Produce business or organisational information using word processing functions 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 x to xii. This will ensure that all exercises and instructions in this book will work exactly as they should.

## Retrieval 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 xvi and instructions for downloading these files from our web site are included on page xvii.

## What you will learn

In this course 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

## 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).

Revision theory is included at the end of most sections followed by a Practice Assessment. Our books include accumulation and consolidation of learning which carries across each section.

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.

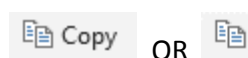
**forecast**  
= to  
calculate a  
future  
result

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.

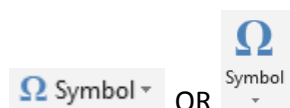
## Different Word buttons

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.


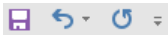


The Symbol button can show as either -



## 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**

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

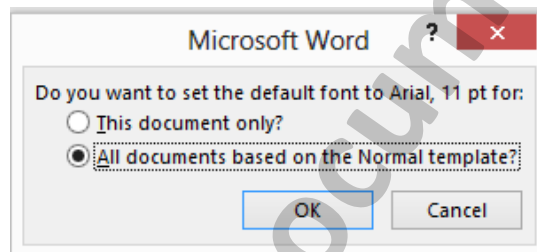
## Changing Defaults

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:

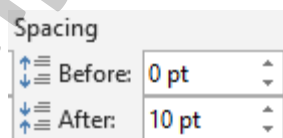
- 1 Click on the Font Dialog Box Launcher **Font** which will display the Font dialog box.
- 2 Change the Font: to Arial and the Size: to 11 pt.
- 3 Click on **Set As Default**.
- 4 Ensure the following option is selected for the font to be applied to *All documents based on the Normal template*.



- 5 Click on OK.

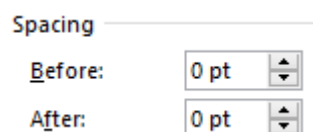
### Spacing

- 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 **Paragraph** which will display the Paragraph dialog box.
- 2 Change the Spacing After: to 0 pt as shown below.



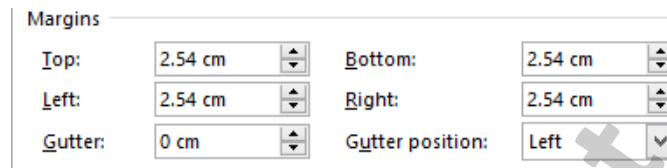
- 3 Click on **Set As Default**.
- 4 Ensure *All documents based on the Normal template* is selected then click on OK.

## Margins

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

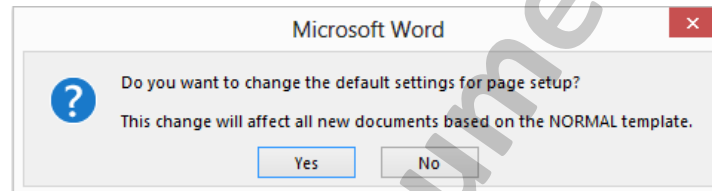
If margins are displayed as 3.17 cm change them as follows. (If they have been changed to those shown below click on Cancel.)

- 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 .

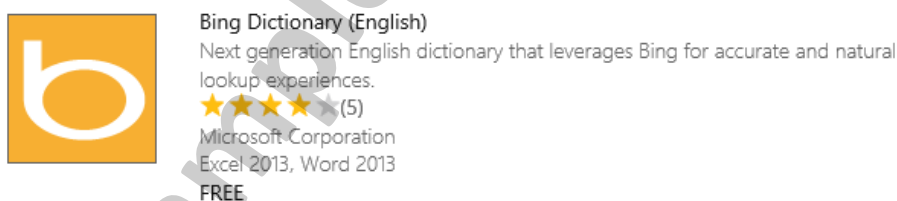
- 2 In the Apps for Office dialog box click on  which will take you to the Microsoft Apps Store.

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

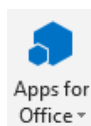
- 3 In the Search box at the top of the window type **dictionary** as shown below.




- 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 .

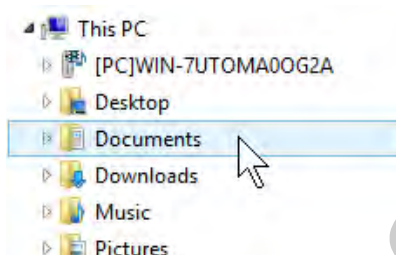


The Bing Dictionary will now show on the  button and will be used for spelling and grammar checking, synonyms and thesaurus.

## 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:

- 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

---

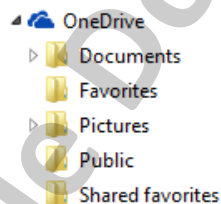
OneDrive is a cloud storage application from Microsoft. It is one of the major online file storage options competing with Dropbox and Google Drive.



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

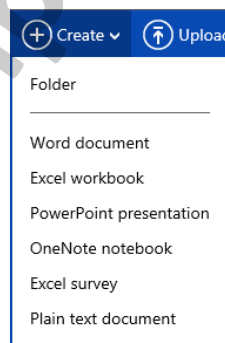
You can log in to the OneDrive website using your web browser with your login name and password.

The website is [www.OneDrive.live.com](http://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

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



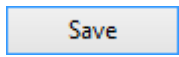

Names of files	
Adelaide Shopping	Merge-Main
Banking	Motor Homes
Beads, Seeds and Shells	Mouse
Beauty Care	Numbering
Book Sales	Paris in the late 19th Century
Cairns	Planning a Wedding
Care of a New Puppy	Proofreading-test
Caring for your Carpet	Rafting
Cashflow	Send-a-Basket-test
Choosing a Cat	Show Jumping
Costello	Sort List
Departments	Sorting Assessment
Dining Out	Sorting Exercises
Email List	Sparkling Pools
Formats-test	Suncare
Good Food News	Tables-test
Italy	Toastmasters
Jury Service	Toastmasters Flyer
Managing a Mortgage	Tour and Event
Mclvers	Triathlon
Merge-Data	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: <b>www.cherylprice.co.nz</b>
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="1056 669 1356 851" data-label="Image"> </div>
4	Click on 
5	Click on <a href="#">US 112</a>
6	Under the <b>Exercise Files</b> heading click on the underlined blue hyperlink, ie Book Exercise Files – V6 Word 2013 <a href="#">Free Download</a> The File Download dialog box will display.
7	<p>a Click on  <a href="#">Save as</a> then</p> <p>b Change file name to <i>US112 v6 Excel 2013 Book Exercise Files</i>.</p> <p>c Click on the Documents folder shown below.</p> <div data-bbox="646 1400 1029 1624" data-label="Image"> </div> <div data-bbox="375 1646 454 1724" data-label="Image"> </div> <p>The Documents folder under This PC is the shortcut for C:\Users\User Name\Documents</p> <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)

<b>Title</b>	<b>Produce business or organisational information using word processing functions</b>		
<b>Level</b>	<b>3</b>	<b>Credits</b>	<b>5</b>

<b>Purpose</b>	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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<b>Classification</b>	Business Administration > Business Information Processing
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<b>Available grade</b>	Achieved
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<b>Entry information</b>	
<b>Recommended skills and knowledge</b>	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.

<b>Planned review date</b>	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

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

## Section

# 1

## File Management Bullets and Numbering Hyphenation Pagination



### Learning Outcomes

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

- ☐ Create, use and delete folders
- ☐ Copy, move, rename and delete files
- ☐ Differentiate between program and document files
- ☐ Use bullets and numbering options
- ☐ Insert hyphens automatically and manually
- ☐ Use pagination options



*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**  
**Hard Page Break**  
**Hyphenation**  
**Multilevel List**  
**Navigation Pane**

**Non-Breaking Hyphen**  
**Non-Breaking Space**  
**Non-Printing Symbols**  
**Numbered Paragraphs**  
**OpenType Font**  
**Optional Hyphen**  
**Ordinary Hyphens**  
**Orphan**  
**Path Name**  
**Recycle Bin**

**Shortcut Keys**  
**Show/Hide Button**  
**Soft Page Break**  
**Template**  
**Text Effects**  
**TrueType Font**  
**USB Drive**  
**White Space**  
**Widow**

# File Management

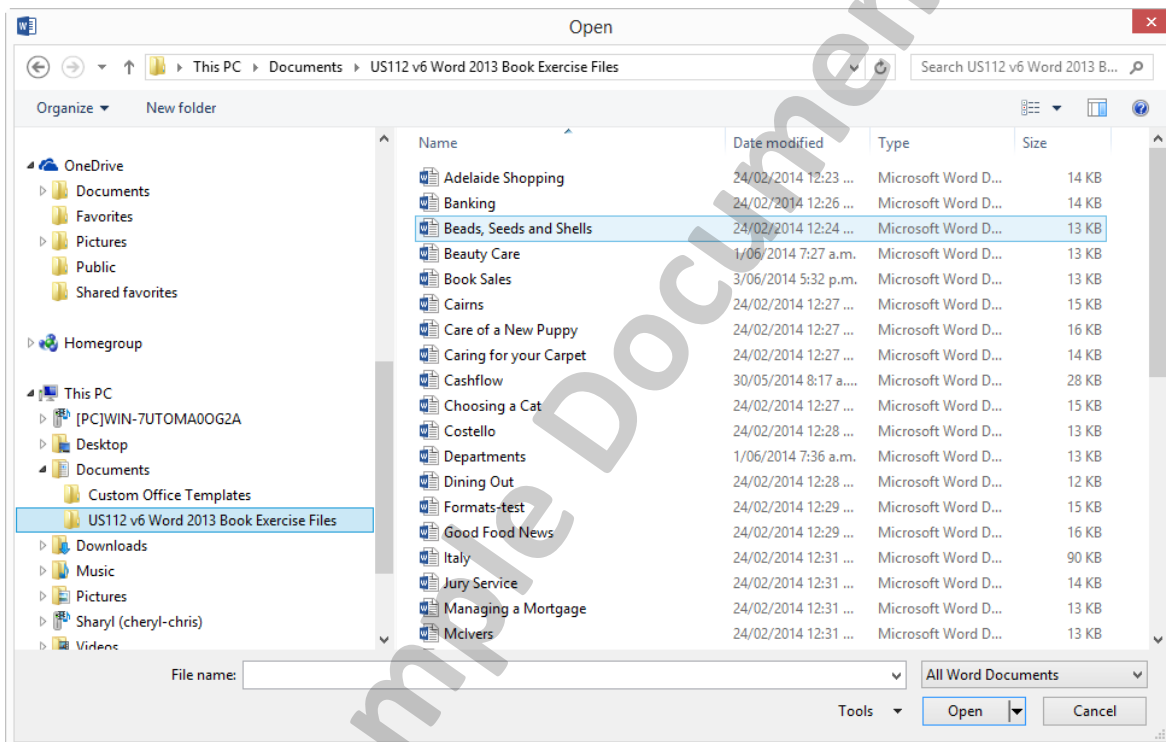
## Folders

In any program it is useful to set up **folders** so that work can be filed in separate sections - similar to putting documents relating to different projects in separate drawers in a filing cabinet. (Subfolders can be created below folders.)

For the purposes of file management in this book it is assumed that you are saving and opening files from C:\Users\User Name\Documents folder which is also displayed as a shortcut under This PC\Documents.

A folder called *US112 v6 Word 2013 Book Exercise Files* has been placed in the Documents folder under This PC as shown below.

This folder contains all the exercise files you will use in this book.



You will create a folder called *Exercise Files 1on1* later in this section.

## Path Names

A **path name** refers to the location of a file/or files.

A backslash (\) is used between folder names to clearly identify each folder.

An example of a path name would be the location of the exercise files that have been downloaded to the Documents folder shortcut as shown below.

C:\This PC\Documents\US112 v6 Word 2013 Book Exercise Files

The actual pathname is:






C:\Users\User Name\Documents\US112 v6 Word 2013 Book Exercise Files



## The Open Dialog Box

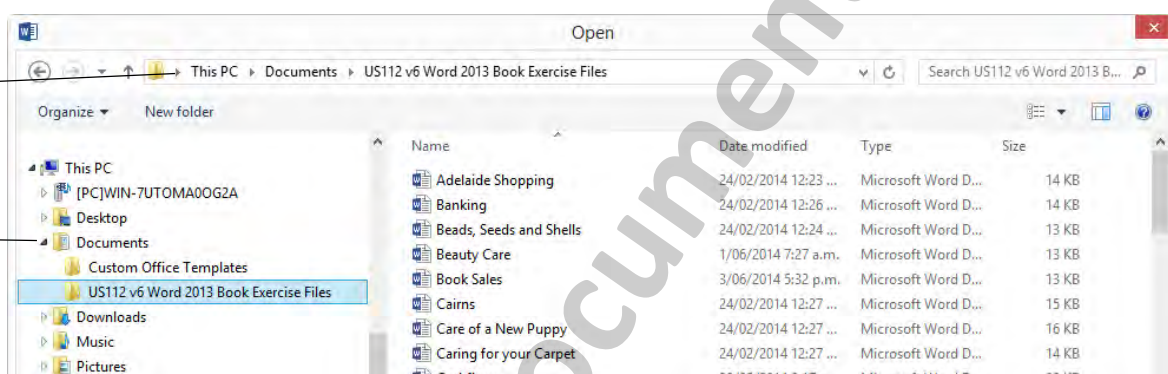





### EXERCISE 1

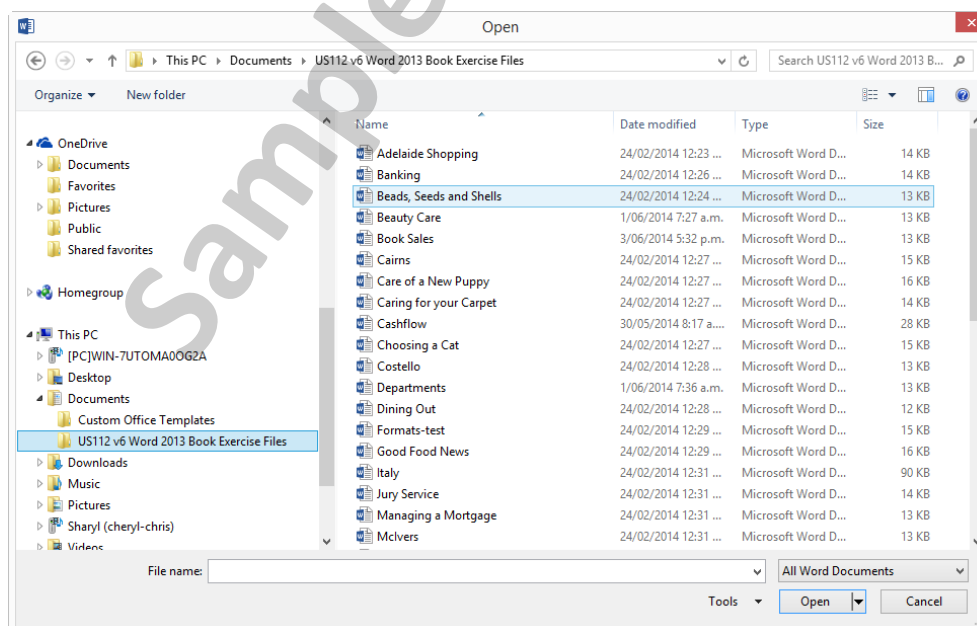
- 1 Start Microsoft Word 2013.
- 2 Click on **FILE** and click on **Open**.
- 3 Click on  Computer then on .
- 4 On the Navigation Pane, under This PC click on the  at the left of  Documents. Folders displayed under Documents will be displayed.
- 5 Click on the  **US112 v6 Word 2013 Book Exercise Files** folder. This will display all Word documents in the *US112 v6 Word 2013 Book Exercise Files* folder which are shown below.

Address bar - displays the current folder

Navigation pane



- 6 If files are not displayed as shown below click on the More Options  from the Change your view button  at the top of the dialog box and select  Details. (You will see that OneDrive with the Documents folder is displayed above This PC (and Homegroup).)



The Open dialog box displays:

- The name of the active folder - currently *US112 v6 Word 2013 Book Exercise Files*.
- A list of files stored within the *US112 v6 Word 2013 Book Exercise Files* folder.
- The type of files currently selected, ie All Word Documents.

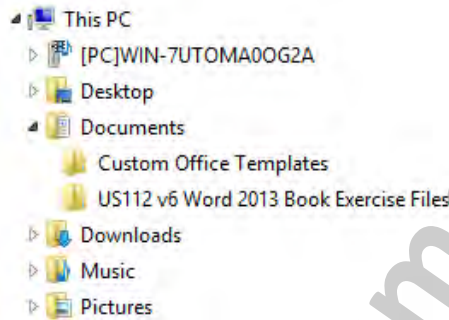
- 7 Position the mouse pointer on the title bar of the Open dialog box and double click. This will expand the dialog box to full screen. With the dialog box shown at full screen you can see all items listed in the Navigation Pane.



The Open and Save As dialog boxes can be resized by placing the mouse pointer at the edge of the dialog box; when the double arrow appears click and drag to resize.

## Navigation Pane

The **Navigation Pane** at the left of the Open and Save As dialog boxes helps you to move around your computer.





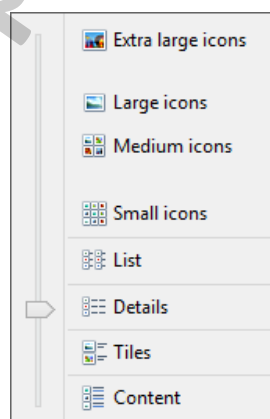
Your pictures are directed to the Pictures folder.

## Managing Files



### EXERCISE 2

- 1 Double click on the title bar of the Open dialog box to return it to its normal size.
- 2 Click on the  of the Change your view button  and look at each of the options shown below and how these options change the display of your files.



- 3 Change the view back to Details.

Exercises that relate to the following notes are included on page 8.

## Selecting Files

**One File** Click on the file.

**Random Files** Click on the first file. Hold down the Ctrl key and click on other files. (You can click again on a file to deselect it.)

**Sequential Files** Click on the first file. Hold down the Shift key and click on the last file to be selected. All files between these two files will be selected.

### ***Selected files can then be -***

**Deleted** - by pressing the Delete key.

Ctrl C,  
Ctrl V to  
paste

**Copied** - by right clicking and selecting Copy. You can then change folders and select the folder you want to copy the files to. Right click on a blank area in that folder and select Paste.

Ctrl X,  
Ctrl V to  
paste

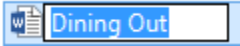
**Moved** - by right clicking and selecting Cut. You can then change folders and select the folder you are moving the files to. Right click on a blank area and select Paste.

**Printed** - by right clicking and selecting Print.



You can also use the **Organize** button at the top of the Navigation Pane to delete, copy, rename and move selected files.

## Renaming Files

- F2
- 1 In the Open dialog box right click on the file and select Rename. The name will be selected, eg 
  - 2 Type a new name for the document, eg **Restaurants** then press Enter.  
Alternatively, click twice in the file name, type the new name and press Enter.


## Saving Files in a Different Format

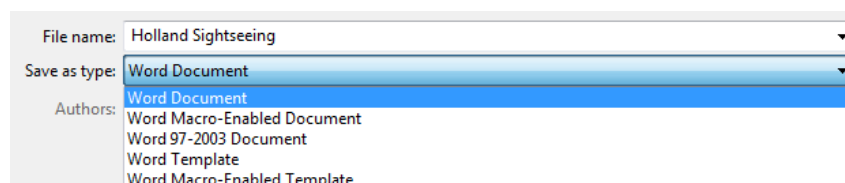
Word files can be saved in a different format, eg as a text file, template, Web Page, PDF, in Rich Text Format (for exporting to other programs), etc.

- 1 With the file open, click on **FILE** then click on **Save As**.

Current Folder

- 2 Click on  US112 v6 Word 2013 Book Exercise Files  
Documents » US112 v6 Word 2013 Book Exercise Files

- 3 Type a file name for the document if necessary then click on the Save as type: .



- 4 Select the file format required and click on .

## Creating Folders

- 1 In the Open OR Save As dialog box move to the folder or position on your hard disk drive where you require a new folder.
- 2 Click on **New folder**.
- 3 Type the name of the folder in the Name box.
- 4 Press Enter.

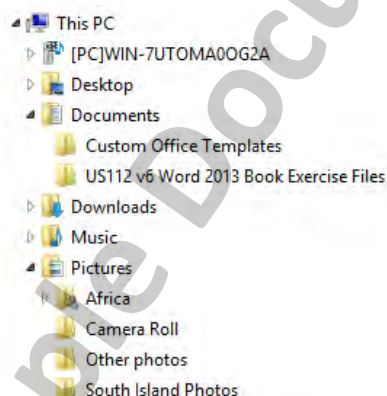


A folder can be created or deleted by right clicking and selecting Delete. All files in the folder will also be deleted.

## Changing and Moving through Drives/Folders

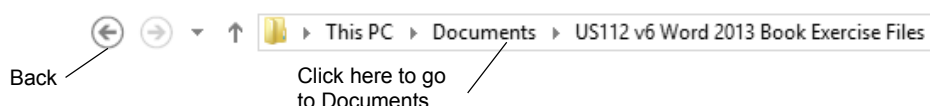
The Navigation Pane is used to move/change to a different folder/drive. The following actions can be used in the Navigation Pane:

- Clicking once on a drive or folder will display its contents.
- Clicking on a folder displays the contents of the folder and a list of any folders under the folder name in the Navigation Pane. An example of folders within This PC is shown below.

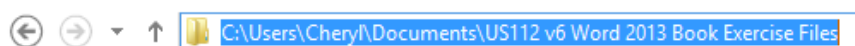


- Clicking on ► at the left of a folder will display the contents of the folder and a list of any folders contained within, under the folder name in the Navigation Pane.
- Clicking on the ◀ will turn off the display of folders listed.

The Address bar at the top of the dialog box can be used to move up a folder or back to a previous location. In the example below, files for *US112 v6 Word 2013 Book Exercise Files* folder are displayed. To move to the Documents folder, just click on *Documents* in the Address bar, or to display This PC, click on *This PC*.



To display the actual pathname click on the book icon ,

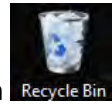


To go back to a previous location click on the Back button as shown above.



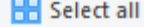
## Recycle Bin

If you are on a network you may not be able to use the **Recycle Bin**.



Right click on a blank area of the Taskbar and select Show the desktop. Double click on the Desktop to display all deleted files.

Files can be restored to their original folder by selecting the file(s), right clicking on a selected file then selecting Restore.

To empty the entire Recycle Bin you can click on the Home tab, click on , click on



the Manage tab then on  to delete all files.

Delete files from the Recycle Bin from time to time. Remember that once files are deleted from here they are gone forever!

## Storage Locations

Each organisation will have different policies for where electronic documents should be stored. Ask your supervisor or consult your policies and procedures manual to see whether documents should be stored in a specific folder or subfolder on the server.

You may also find there is an organisational policy relating to the printing and storage of paper-based documents. Some “paperless” offices will encourage their staff to store documents solely in an electronic format. Others will have a designated location for the storage of printed documents. Printed documents should be stored in a secure, protected location as they often contain commercially sensitive information.

## Folder Structures and File Names

Use logical folder structures on a computer to ensure that files/documents can be located quickly and easily. This allows other users to find and access files just as easily.

An example would be to have a policy that all faxes and letters are stored in the Correspondence folder, monthly reports stored in the Reports folder etc. Businesses and organisations will have procedures in place as to the folder structure to be used. This information is normally found in the company’s policies and procedures manual.

Most organisations have a systematic procedure for naming files, eg all correspondence may have the surname of the recipient, the date and the creator’s initials (smith\_20-12-14\_JD). Information on how to name your files is usually included in the company’s policies and procedures manual.

Read the scenario below and use the organisation's policies and procedures to complete Exercise 3 underneath.

## *Training One on One*

*You work as an assistant for a group of computer tutors and are required to perform various tasks guided by the Organisational Policies and Procedures information below.*

### **Organisational Policies and Procedures**

Each student workstation has a folder containing exercise files stored in a folder called *Exercise Files 1on1* in the default Documents folder.

Files used for testing have the word *test* at the end of the file name. These need to be deleted once a student has completed and passed an individual course.

For on-site training at a client's location exercise files are to be copied onto a **USB drive**.








### **EXERCISE 3**

- 1 Delete the file called **Formats-test**
- 2 Delete random files – **Tables-test, Proofreading-test, Send-a-Basket-test**
- 3 Rename the file called **Mouse** to **Using IntelliMouse** and **Suncare** to **Sun Protection**
- 4 Print all the files that begin with C.
- 5 Make a folder under the Documents folder called *Exercise Files 1on1*
- 6 Copy the following files to the *Exercise Files 1on1* folder - **Italy, Jury Service, Motor Homes**
- 7 Practise moving through folders and drives.
- 8 Copy the following files to a USB Drive - **Sparkling Pools, Costello, Toastmasters**
- 9 Open the file called **Jury Service** from the *Exercise Files 1on1* folder, type *Training One on One* at the end and then save the file in Rich Text Format. Close the file.
- 10 Open the file called **Dining Out** and save it as a Web Page. Close the file.
- 11 Delete the folder called *Exercise Files 1on1* and the files within that folder.

## File Types

There are different types of files stored on a computer. In Word 2013 documents are saved as files. Files in Windows 8.1 can be identified in several ways in the Open or Save As dialog boxes –

Icon	File	Extension
	Microsoft Word Document	.docx
	Microsoft Word Template	.dotx
	Microsoft Excel Worksheet	.xlsx
	Microsoft PowerPoint Presentation	.pptx
	Microsoft Access Database	.accdb

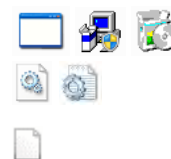
- the icon displayed next to a file
- information in the Type column when Details view is selected from the Change your view button OR Type of file information displayed in the File Properties dialog box (right click on a file then select Properties)
- the **file extension** (these are the letters that are added to the end of a file name, eg Word 2013 documents have .docx added). (By default extensions are turned off in Windows 8.1.)

Other files you may come across when using your computer:

Executable files (ie files that start a program) .bat, .exe

Program files .dll, .ini

Files with unknown file extensions




## Identifying Documents and Templates

**differentiate**  
= to know  
the  
difference


Unit Standard 112 version 6 requires you to differentiate between a **document** and **template** file.

A *document* is the name given to a Word file that has been created using a *template*.

A *template* contains the default font and page layout settings for every new document.

In the following exercise you will look at where templates are stored on your computer and how you can identify them. As you have learnt above documents can be identified by an Word icon , extension (.docx) and by file type shown in Details view.

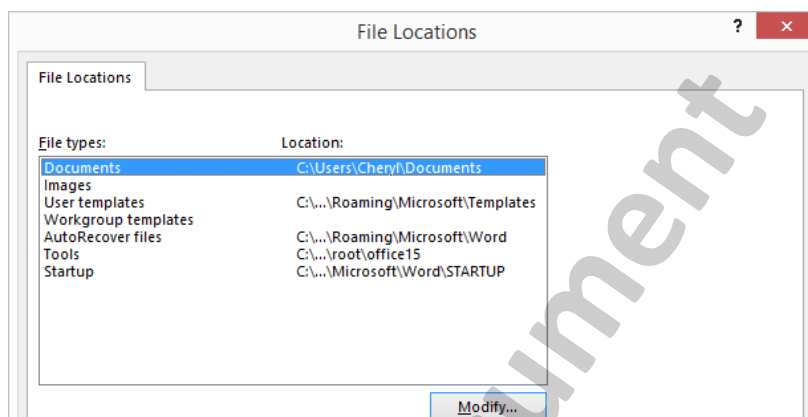
In Word 2013 templates that are created are stored in the following location on my computer using Windows 8.1 and Word 2013 (with Cheryl as the username) –

 > This PC > OS (C:) > Users > Cheryl > AppData > Roaming > Microsoft > Templates >



## EXERCISE 4

- 1 To see where *documents* and *templates* are located on your system, click on **FILE** and select **Options**.
- 2 Click on Advanced and scroll down the list to the General section.
- 3 Click on **File Locations...**. There you will see that two types of templates are listed - User templates and Workgroup templates. Word will look to the User templates folder before the Workgroup templates folder.



The location of the User templates folder may vary depending on the setup of your computer, and the operating system you are using.

- 4 If you are using Windows 8 or 8.1 the location of your templates would normally be C:\Users\User Name\AppData\Roaming\Microsoft\Templates.

A copy of the default template *Normal* should be listed in the User templates folder.

In Word 2013 *documents* have a .docx file extension and *templates* have a .dotx file extension. You can see the file extension by right-clicking on a file and selecting Properties.

- 5 The location of the Templates folder is displayed on the Address bar at the top of the Open dialog box. Write this path name in the space below for your own information:

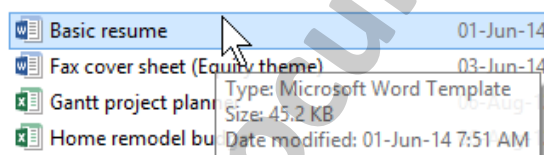
- 6 Click on Close then on Cancel.
- 7 Display the Open dialog box.
- 8 From the Navigation Pane click on OS (C:) (Your C drive may have a different name, eg Local Disk (C:)).
- 9 Double click on Users , on User Name (in my example, on Cheryl then on AppData .
- 10 Double click on Roaming then on Microsoft and lastly on Templates .
- 11 Ensure is displayed.



Microsoft Office templates are displayed to the right of the dialog box. We have turned on the display of file extensions - Word templates show a .dotx extension (or a .dotm extension if it is a macro-enabled template). If you cannot see the file extension right click on the template and select Properties.

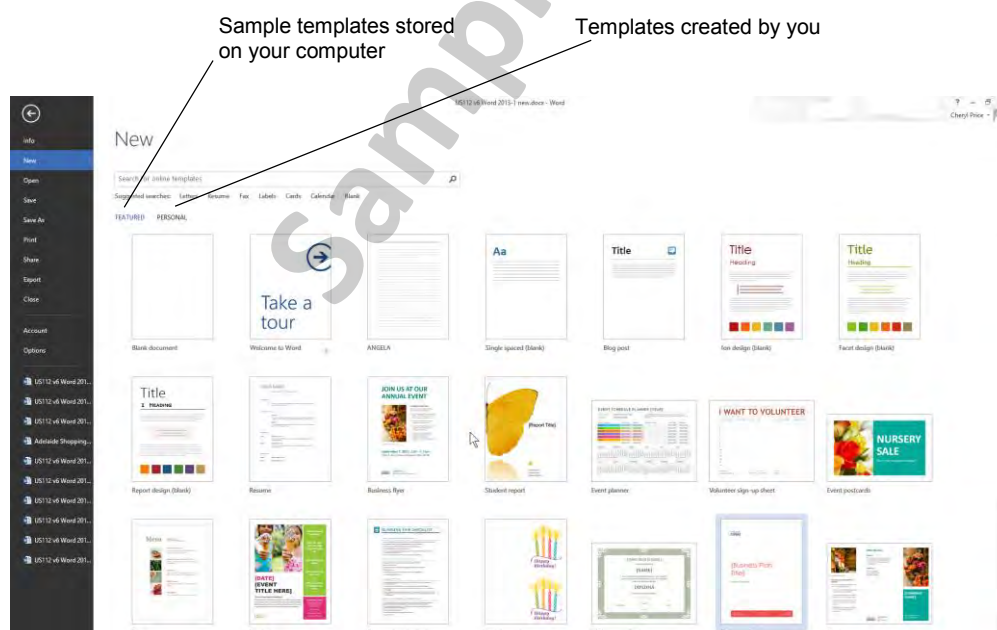
Charts	15-May-14 1:29 PM	File folder	
Document Themes	12-Jun-13 1:39 PM	File folder	
LiveContent	18-Mar-13 6:17 PM	File folder	
SmartArt Graphics	21-Nov-13 2:12 PM	File folder	
Basic resume.dotx	01-Jun-14 7:51 AM	Microsoft Word Template	46 KB
Fax cover sheet (Equity theme).dotx	03-Jun-14 3:45 PM	Microsoft Word Template	70 KB
Gantt project planner.xlsx	06-Aug-13 9:00 AM	Microsoft Excel Template	46 KB
Home remodel budget.xlsx	06-Aug-13 9:09 AM	Microsoft Excel Template	61 KB
Mail merge fax (Equity theme).dotx	07-Mar-14 1:24 PM	Microsoft Word Template	89 KB
Normal.dotm	03-Jun-14 5:37 PM	Microsoft Word Macro-Enabled Template	19 KB
NormalEmail.dotm	27-Aug-13 3:50 PM	Microsoft Word Macro-Enabled Template	18 KB
OfficeStartup.ppsx	18-Mar-13 6:17 PM	Microsoft PowerPoint Slide Show	239 KB
Welcome to Excel.xlsx	10-Jun-13 2:12 PM	Microsoft Excel Template	45 KB
Welcome to Word.dotx	18-Mar-13 2:43 PM	Microsoft Word Template	268 KB

- 12 Position your mouse pointer on a template. Information about the type of file, size and date modified is displayed, an example is shown below. This is a quick way to see the file type, eg



- 13 Click on Cancel to exit the Open dialog box.

Documents are created from templates by clicking on **FILE** then **New** and selecting the appropriate template.



You will learn how to use and create templates on page 111.

# 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

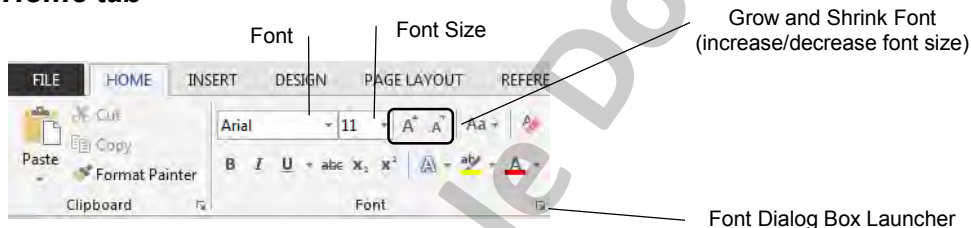
A font is a style of type. **Fonts** can be increased or decreased in size (known as point size or pt). Windows has a variety of “**OpenType**” and “**TrueType**” fonts that will print with all printers (they have  and  next to them on the drop-down list on the Home tab).

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

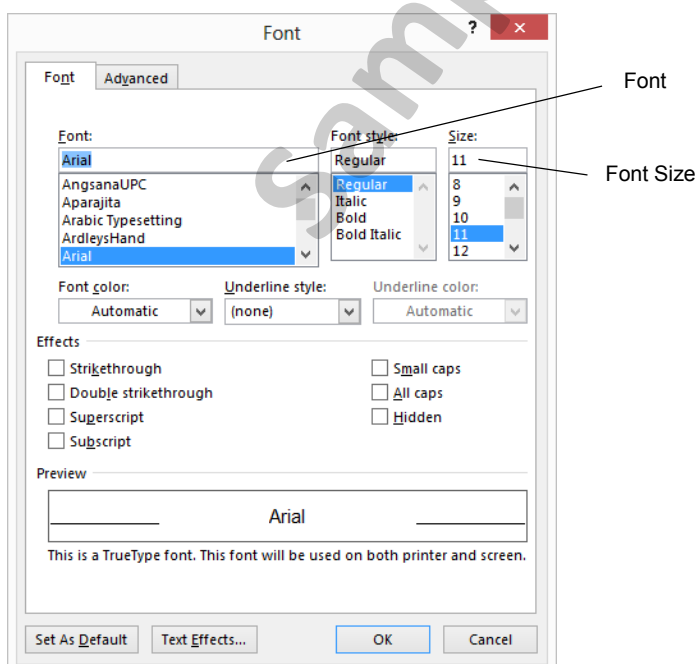
To apply character formatting to a single word simply click in cursor anywhere within it and formatting will be applied to the whole word (ie it is not necessary to select the entire word).

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

### Home tab



### Font dialog box



Click on the Font Dialog Box Launcher  
in the Font group on the Home tab to display the Font dialog box.