

Write complex documents

Learner Guide



Table of Contents

1. Plan documents	5
1.1 - Determine the purposes of documents.....	5
Ergonomics.....	6
Chair	7
.....	7
Keyboard	7
Workstation – Avoid Overreaching.....	8
Take a break to minimise eye fatigue	8
Adjust Furniture	9
Overuse Syndrome.....	9
Conservation	9
1.2 - Choose appropriate formats for documents	13
Emails	13
Detailed business letters.....	13
Instructions and procedures	14
Manuals.....	14
Legal or traditional requirements for the particular document format	15
Organisational policy, procedures and guidelines applying to writing documents, including house style	16
Point numbering systems	18
Publications, brochures and leaflets.....	18
Reports.....	19
Requirements for illustrations, photographs, graphs, charts, maps and other illustrative material to explain texts	20
Speeches and presentations	20
Standards for references	20
Standards for footnotes.....	23
Standards for citations.....	23
Standards for acknowledgements	23
Time lines, including deadlines	24

Website text.....	25
Word length	25
Writing styles, including simplicity of English and use of technical language	25
1.3 - Establish means of communication	27
1.4 - Determine requirements of documents.....	29
1.5 - Determine categories and logical sequences of data, information and knowledge to achieve document objectives.....	32
Arguments and rebuttals	32
Chronological, alphabetical or operating sequences.....	33
Facts, observations, conclusions and recommendations	33
Recommendations and supporting arguments	34
Illustrative case studies and other examples.....	34
Linking and summary statements.....	34
1.6 - Develop overview of structure and content of documents.....	34
Structure	35
Table of contents	35
2. Draft text	38
2.1 - Review and organise available data, information and knowledge according to proposed structure and content.....	38
2.2 - Ensure data, information and knowledge is aggregated, interpreted and summarised to prepare text that satisfies document purposes and objectives	38
Interpret.....	39
Summarise	39
Aggregate.....	40
2.3 - Include graphics as appropriate.....	40
ClipArt	41
Picture	42
Charts.....	43
SmartArt.....	44
Shapes.....	44
Common graphics can be used in the following circumstances:.....	46
2.4 - Identify gaps in required data and information and collect additional material from relevant enterprise personnel.....	46

2.5 - Draft text according to document requirements and genre	47
2.6 - Use language appropriate to the audience	49
Internal and external customers.....	50
Recipient/s who receive a copy for information	50
Primary recipient/s of the communication.....	50
3. Prepare final text	51
3.1 - Review draft text to ensure document objectives are achieved and requirements are met	51
3.2 - Check grammar, spelling and style for accuracy and punctuation	51
Meeting Needs.....	54
Legislative requirements.....	54
Technical requirements	55
Organisational requirements	55
3.3 - Ensure draft text is approved by relevant enterprise personnel.....	55
3.4 - Process text amendments as required	55
Identify text that you want to change	56
4. Produce document	58
4.1 - Choose basic design elements for documents appropriate to audience and purpose	58
4.2 - Use word processing software to apply basic design elements to text	58
Fonts.....	58
Capitals.....	59
Underlining.....	59
Justification and alignment	60
Lists	60
Headings.....	61
Paragraph indentation	61
Tables	62
Margins	64
Use and amount of white space	64
4.3 - Check documents to ensure all requirements are met	65

1. Plan documents

1.1 - Determine the purposes of documents

On 1 January, 2012, the Work Health and Safety Act became harmonised so that the legislation, regulations and codes of practice will be consistent across States and Territory. For the purposes of using safe work practices, you should understand your duty of care in regards to using technology in a work environment.

As a worker you are required to ensure that your worksite is safe and free from hazards and risks. If you see a hazard or risk you must report it to your employer. If you do not report a risk or hazard you may be held liable under law if anyone is injured. Your employer has a duty to you, the worker, to correct any risks and hazards on the worksite. If you are injured; your employer can be held liable for negligence.

No environment is free from danger no matter how much the organisation plans.

If are not familiar with your organisation's policies and procedure regarding safe work procedures in using technology then you should access and read the information.

Other information that you should read includes:

- The equipment operating guidelines; and/or
- The manufacturers' manual.

Basic safety standards that you need to follow include:

- Allowing no moisture to fall near electrical equipment and leads
- Ensuring that the equipment is well ventilated
- Keeping metal objects like paper clips away from equipment
- Maintaining equipment.

Consult your supervisor or colleagues or manufacturers manual if you have any problem understanding any of your work place procedures in regards to the operations of the technology.

If you identify a hazard in your work area, report it.



Before you start work, inspect your work area

- There are not too many plugs connected to power points.
- That lighting is safe and hazard free by ensuring that
 - Light does not reflect off computer screens
 - Lights do not flicker
 - Shadows and reflections do not bounce off the computer screen

Each of these will interfere with your ability to read the computer screen.

**Other safety issues that you should be aware of are:**

- If you find that equipment is loud, put the noisy equipment in another area that will ensure that the noise does not interfere with work output.
- If your computer terminal does not have a radiation screen, order one to put over the computer screen to minimise exposure to radiation.
- If you sit for long periods of time in front of a computer, sit 50 centimetres away from the screen.
- Make sure that the air conditioning or heating is not too hot or cold. Temperatures should be between 21 to 24 degrees Celsius. If the temperatures vary too much it can harm your health and safety.

Ergonomics

Ergonomics is the relationship between the tools of doing your job and the people using the tools. The tools of any job must be appropriate for the job. In an office environment, to decrease the chance of risk; chairs, tables and desks need to be adjustable.

If you cannot adjust your furniture you can do the following damage:

- If you sit incorrectly, you can suffer musculature damage.
- If you do too many repetitive tasks you could end up with RSI.
- Fatigue can be caused by eye stress.
- These problems are addressed through the control and use of the workstation design.

Dohrmann and Associates in Ergonomics in Australia have made the following recommendations in regards to minimise the chances of discomfort and stress in the workplace.

Chair

- Posture is a very important part of your workstation design. This is why you need to make sure that you choose the correct chair to work from.
- Your chair should always be on a 100 – 110 degree angle. Have an active back mechanism and adjustable armrests so that you can change your position frequently.



Keyboard

Your keyboard is in the correct position. The correct position will allow you to:

- Bend elbows at a 100 -110 degree angle.
- Sit upright and tilt your keyboard away from you at a negative angle.
- If you are using a wrist rest, only use it when you are typing. Do not rest your hands on the rests if you are not typing.
- Do not place your wrist rest higher than your keyboard space bar.

Workstation – Avoid Overreaching

- Keep your work close to you at all times.
- If you look at your document holder as much as you look at the screen, place the screen in front of you and the document holder slightly to the side. Adjust positions until you are comfortable.
- If you have books or paperwork on shelves or in files, do not reach for them. Stand up and walk to pick them up.



Take a break to minimise eye fatigue

A short 1 -2 minute break every 20 -30 minutes will help you to minimise eye fatigue. If necessary, change tasks every five to ten minutes. Use the correct posture and move every 5-10 minutes.

Good posture will reduce the occurrence of strain and fatigue. To maintain good posture:

- Always centre your monitor.
- The top of the monitor should be around 2-3 inches above seated eye level.
- Sit arm distance from the screen and adjust the distance from your screen.
- If you get a glare, adjust computer screen, partially close curtains and keep glare to a minimum level.
- Keep your head upright and balanced
- Avoid pressure to the front of your seat
- Keep shoulders relaxed
- Make sure that feet are firmly supported.



Adjust Furniture

To minimise the chances of OOS adjust your furniture. For example, make sure that your chair can be adjusted so that your elbow tips are even with the ASDF keys, that your desk is adjustable and gives you lumbar support.

Overuse Syndrome

Occupational Overuse Syndrome (OOS) is also known as Repetitive Strain Injury (RSI). In the 1980s, OOS cost organisations millions of dollars. Computers were new to the workforce and Australia was uneducated about the damage that OOS could do to the body. OOS has a range of conditions. It can affect muscles, tendons, back, shoulder, neck, wrists, fingers and hands leading to persistent pain and discomfort.

To prevent OOS you should:

- Avoid all risks in the workplace
- Avoid stretching
- Maintain comfortable grip on all hand tools
- Use ergonomically designed furniture e.g. mouse, keyboard
- Vary your work load throughout the day

If you work in an occupation that consists of many repetitive tasks, then you need to make sure that you take breaks and vary your tasks. OOS can affect your ability to work, so it is important to make sure that you follow the steps outlined in the first part of this manual.



Conservation

Conservation of the planets resources has led to many nations in the United Nations to signing a conservation pact. Part of Australia's contribution to the conservation of the planets's natural resources is to create awareness about the environment. To minimise costs to the environmental and to conserve energy, many organisations are changing the way in which they use paper.

To minimise cost to the environment, organisations:

- Store email messages in folders on their computers rather than printing them
- Recycle paper and toner cartridges.
- Reuse paper
- Print both sides of the paper
- Print only the copies you need.

To conserve energy, organisations:

- Use the 'power save' option on equipment
- Switch of lights when no one is in the area

We live in an age of information. Everywhere you look there is information and knowledge at your fingertips. As the pace of technological innovation increases, more and more demands on our time will be required, as we are living in a dynamic and forever evolving time period. Globalisation has opened many more business opportunities for organisations. To meet the growing demands there has been increases in legislative and regulative requirements for most industries.



As a leader, you will be required to report more and more information to management as the demands of change impact further on your job role. The purposes of documents that you may be required to write may include:

- **Conveying research findings**

Conveying research findings so personnel will understand, believe and act upon them. Take the time to convey information without being boring. Be clear on what you are delivering.

Make sure that you are aware of your audience and when they require the information. The information that you provide them should be tailored to the needs and interests of the audience. Try to make it brief and succinct. Stick to the details. No one wants to read information if it does not relate to their needs.

The detail provided in your research will determine the detail and how formal you should be on your deliverable. When you provide information, it is important to communicate your findings and remain with the facts.

- **Documenting policies, procedures and processes**

Every time there is a change within the work place, there needs to be a correlating update of policies, procedures and processes that must be communicated to personnel. Organisations have a legal obligation to consult with workers and anyone impacted or influenced by a change. Even though this process relates to hazards, many changes will usually require a review as every time a change occurs in the workplace there is the potential that a hazard may arise due to the change.

Updating policies and procedures will vary from organisation to organisation. As such, if you are not already familiar with the process in your workplace, you should take the time to learn the correct procedures. As documentation is updated, it needs to be

communicated to personnel as you will be sharing critical information as it is developed. Once the information is documented, the information must be shared, not only as a requirement of work health and safety law, but to ensure that personnel can make informed decisions.

Documenting processes helps in creating systematic information to develop a flow of information and helps to identify where updates in procedures will impact on the organisation.

➤ **Influencing attitudes, opinions, beliefs**

Attitudes have a big impact on beliefs. Attitudes form how we evaluate things and form opinions. Attitudes influence how we feel, how we think and influences our behaviour. Attitudes are formed as a direct result of personal experience. Researchers have demonstrated that attitudes influence behaviour through:

- Personal experience
- Knowledge of a subject
- Expecting a favourable outcome
- Making sure that the subject is repeatedly expressed; and
- Parties stand to win or lose due to the issue.

When you communicate with parties, it is essential to ensure that you communicate in a manner that aligns with their attitude. Give people facts and figures, cause and effect, to influence their attitudes. Attitudes are easier to change than beliefs and opinions. Take the time to make sure that parties know what is in it for them.

➤ **Meeting legal requirements**

Environmental scanning is the process of scanning the environment, political, legal, economic, technological and social environment for changes. The legal environment will provide you with updates in ensuring that your legal requirements are met. Employer or industry association membership will ensure that you will be kept up to date on changes to the legal environment and how the organisation can change its policies and procedures in regards to changes to legislation and the impact the change will have on the industry.

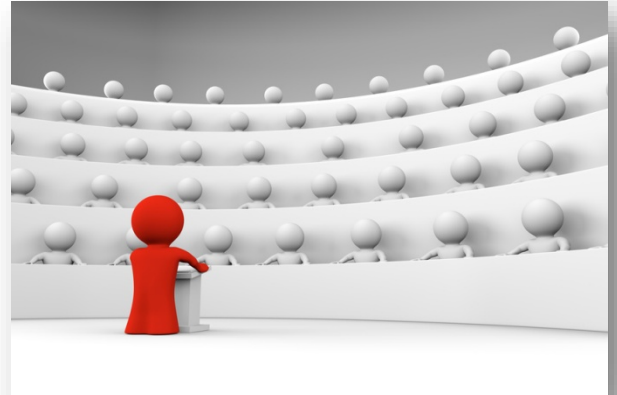


For changes in Work Health and Safety Legislation, you can access Safe Work Australia and entering your email on the website and subscribe to updates at URL Address: <http://www.safeworkaustralia.gov.au/Pages/default.aspx> Access Date: 20.02.2012

➤ **Meeting other data, information or knowledge needs of an audience**

No matter how in touch you are with the needs of the audience, you never know exactly how people will see it. The best way in which to meet the needs of your audience is to test it to make sure that the leaders within the group understand what you are trying to convey. If other leaders support your recommendations, you will find that they are likely to influence each other in a group setting.

For this reason, work group meetings are an excellent way in which to convey information to workers. Meetings give workers and management a forum in which to discuss information, data and provide knowledge. It is only when there is one real option that is viable that you influence the audience.



Workers must feel that they are part of the decision making process. However, you should always stick to facts. Personnel must see the idea as their own idea. The more facts that you give them, the more they will have to reflect on. Make sure that you reinforce each point to let them know what is in it for them.

➤ **Proposing recommendations, options and actions**

Proposing recommendation, options and actions provides management with a choice. Make sure that both the positive and negative aspects of the problem are considered. It is important that the writer is objective in every instance. These documents are updated and recorded.

Make sure that you stay focused on the organisational requirements and legislative requirements when you write a document. If you do not, then you may miss important information. To maintain the respect of personnel, you need to make sure that you maintain credibility. This means that you need to consider all of the contingencies that will impact on the way you write your document.

1.2 - Choose appropriate formats for documents

The format of information is guided by organisational policies and procedures. Legislative and regulative requirements will influence the way in which you present information. Organisations will have a set format that they follow. To ensure that the formatting in a document is consistent, a template of the documents that are produced should be easily accessible in your software.

Note that the following information provides you with examples of different formats. Formats for different templates may be found in your software programs (see Appendix Number Two). You will find that there are different formats for different information. If you are not sure about the format required for a specific document, ask a member of your work group. If there are no standardised templates, access files to see how a specific report was presented originally and follow its formatting structure.

Appropriate formats for documents may include:

Emails (Appendix One)

To open electronic mail, you must go to

Start- All Program-Microsoft Office-Microsoft-Office Outlook

Most organisations use Microsoft Office now, however, it is important to read your organisations policies and procedures to make sure that you are using the correct program.

Every email that you send has a several sections. If you are not already familiar with these sections, then you should ask for assistance.

Detailed business letters (Appendix Two)

A normal part of your day will include being exposed to different types of letters. Whilst the style and format of the letters will vary, the same general rules shall apply.

When you write a letter, it is important to keep your style more formal than the way you normally speak. The layout should be clear and have all of the information set out.




Instructions and procedures

Instructions are the steps required to complete a task or a series of tasks. The audience is usually someone who does not have the ability to perform a task. Procedures are a special type of instruction, usually for personnel who are familiar with a task. Procedures ensure that all work group members coordinate their activities when reviewing a task.

Instructions and procedures are written and designed for several different formats from brochures to printed material in PDFs from the internet to CDs that arrive with a product. The format used should correlate with the audience.

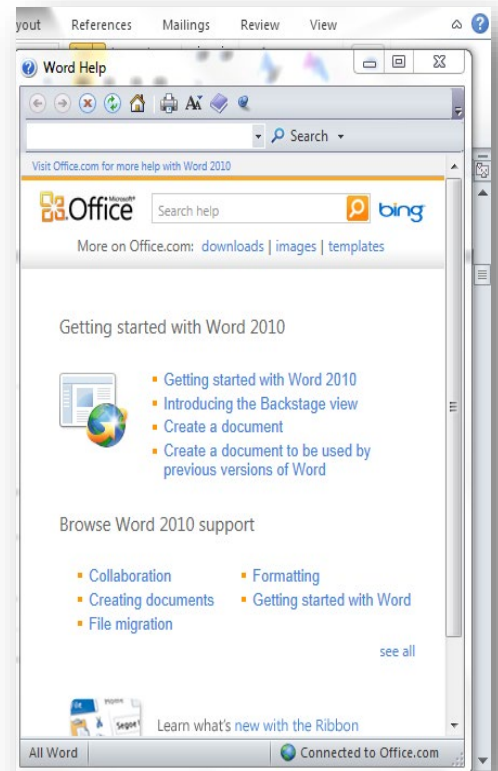
Instruction and procedure formats may include:

- Instructional brochures that are posted, mailed or handed out to a broad audience
- User manuals
- Quick reference materials such as a web page or wallet sized card
- Hyperlinks to online instructions that allow users to read different layers of information
- Computer instructions that can be found within your software. Access these instructions in Microsoft Office 2010, click once on the  on the upper right hand corner of your screen and the task pane showed above will open.

Manuals

Manuals have a tendency to be more comprehensive than instructions and contain information about using products, along with descriptions and specifications, legal warnings on how to use the product safely and troubleshooting advice on the operations of a product or how to perform a task.

Instructional manuals such as this learner guide should be easy to follow and understand. It can also be used as a reference document when learning is complete.



Legal or traditional requirements for the particular document format

Legal documents such as forms for taxation and other government bodies are standardised. Failure to complete the appropriate form with the appropriate boxes answered can lead to rejection of a form. Operating manuals and manufacturers manuals such as safety data sheets used for chemicals clearly outline your requirements as part of the law. For example, the Preparation of Safety Data Sheets for Hazardous Chemicals code of practice is a requirement of the WHS Act, 2011.

Other legal requirements may include:

The **Privacy Act 1988** contains the National Privacy Principles that cover Confidentiality requirements in the workplace. These principles apply to:

- Personal information – information or an opinion (including information or an opinion forming part of a database), whether true or not, and whether recorded in a material form or not, about an individual whose identity is apparent, or can reasonably be ascertained, from the information or opinion.
- Sensitive information – personal information about an individual's records, including racial or ethnic origin, political opinion, membership of a political association, religious beliefs, health status and memberships.



Section 271 of the WHS Act, states that “if a person obtains information or gains access to a document in exercising any power or function under the Act.”

If a person obtains access to confidential information they must not disclose any information or the content of the document. This also means that if you are given access to a document, you must not give anyone else access to the document or use the information or document for any other purpose. If you obtain access to the information or use the information in the document, you cannot disclose the information without the person's consent; or perform your power or function under the WHS Act.

When gathering information under **Anti-discrimination** it is essential that you understand the two different Acts that Anti-discrimination is covered within. Anti-discrimination refers to law that ensures that all people in Australia are treated equally.

- Discrimination can relate discrimination relating to age, sex, marital status, and religion, political and cultural beliefs. This is covered under the Discrimination Act 1991.
- Under WHS law (S105) relates to discriminatory conduct through the dismissal of a worker or termination of a contract or alters a worker's position to their detriment, or if personnel are refused a position and are treated them less favourably than others, then the employer can be found to be discriminating against the potential or current worker.

Each type of discrimination is illegal and you can be fined if found guilty of breaching these laws. Care should be taken to ensure that you also do not discriminate when using words. For example, using sales woman, instead of sales person or stereotyping personnel based on the cultural background.

Organisational policy, procedures and guidelines applying to writing documents, including house style

Consistency of structure will be reflected in the:

- **Company logo** - Logos are a statement of the organisations image. When a customer receives mail from an organisation, they will set it aside as it will distinguish itself from other mail.
- **Company colour scheme**
 - Bright primary colours grab a child's eye. These dominant colours in a reception area are not conducive to increased productivity.
 - Pastels and light colours are conducive to increased productivity and the organisation must reflect this consistency by using more sedate colours on the logo.
- **Document production** - Formatting includes the font, page setting and style of text. This also includes paper size and the type of paper used. For example, no communication will occur without the use of a logo, colour scheme and formatting.
- **Content restrictions** - The restriction of content has been incorporated into many organisation's policies and procedures. This will usually include not using organisational documents such as emails and letters for personal reasons and for sending specific emails. If you are not sure about content, ask for assistance.
- **Templates** - Templates can be found in software. Organisational personnel can develop their own templates to suit their needs and ensure that consistency will automatically run across all of their products. These templates and other "house style templates" (which are required in certain circumstances such as to complete forms) can be found in computers and associated software programs.



When you refer to a style, you are referring to the presentation of the document that you are developing. The style includes:

- The headings that you must use in the document
- The font, type size of text
- Whether text and/or information should be bold, italics or underlined
- Colour of text, bullets and structure of the paragraphs.

Organisational policies and procedures may include:

Paper	White
	9 inches by 11 inches One side only
Title	Centre near the top
	ALL CAPS Your name centred underneath the title Name of team, supervisor and date
Text	11 point standard font
	1.5 space text body Single space block quotes One space following a period at the end of a sentence
Margins	1 inch at top, bottom, and sides
Paging	Page numbers in bottom middle
Indentation	Omit page number on title page and first page
	Indent 5 spaces for each new paragraph
Quotations	Use quotation marks when quoting directly

These format requirements may vary according to the type of organisation and the type of information you are trying to convey. In most instances, organisations will have set procedures for different formats.

Point numbering systems

Numbered lists should be used to ensure that the reader is able to follow the logical sequence of information or instruction. Numbers also assist personnel in identifying where they left the instructions so they do not waste time doubling back.

Publications, brochures and leaflets

A publication is the process of publishing printed matter, such as brochures and leaflets.

A leaflet is a hand bill or flier that is printed and is intended for free distribution.

Brochures are one of the best ways in which to present a company. A brochure has three main functions:

- Advertising function – where the brochure is used as an advertising tool where one or more products is analysed
- Identification function where the brochure allows you to maintain the same criterion with all of the organisations brochures. This will make the companies brochures recognisable immediately.
- Informative function that informs potential clients about your company, including its presentation, its products and services

It is important to choose the correct format to determine the effectiveness of your brochure. Some brochure format is chosen not only for the information presented, but also their structure. Some brochure designs include:

- Folder with flaps and inserts
- Bi-fold brochures letter or A4 size
- Leaflet or A4 size
- Tri-fold A3
- Bo-fold brochure A3

The format of the brochure and its size must match the intention of your brochure. For example you design a brochure to advertise a marketing event, while handing out loose leaf information from other vendors. To assist in carrying the loose leaflets, you would use a folder with flaps and inserts.

Reports

A standard format for report writing includes:

Headings	Outline
1. Title	The title of your document must reflect the report that you are completing. Make sure that the title is short
2. Table of Contents	Should be on a separate page Should have listing of headings for each page Numerical figures are usually used to map the reports logical sequence
3. Abstract Exec Summary	Write last Should summarise the essential points of the report, including conclusions and recommendations Should be clear and easy to understand so the reader can determine whether they should read all of it.
4. Introduction	Must draw in the reader Should explain why the report was written, any relevant information on the subject Should include the methods of evaluation or investigation.
5. Body	Headings must be clear and show body of report Body must correlate with headings Data collection methods should be included The findings of the report and discussion of findings drawn from the theory
6. Conclusions	Sum up the key points of the report Express opinions, but use points to support them Drawn from the discussion
7. Recommendations	Should suggest areas of improvement base on the conclusions Not all reports have recommendations so mention the recommendations if you add them.
8. Bibliography	Or otherwise called reference Lists all publications
9. Appendix	Shows information from the report that would interfere with the flow of information.

Please note that all of the headings in bold must usually be part of the report. The other options depend on the contents of the report and the requirements of the document.

Requirements for illustrations, photographs, graphs, charts, maps and other illustrative material to explain texts

Visuals should be placed next to the step, if not straight after the step is written. Make sure your visual is set in white space. It is important to make sure that your visual repeats and reinforces the words that you have used around visual.

Use boxes to highlight instructions within a lot of white space to ensure that the box stands out. Use symbols , whilst CAPITAL and **Bold** text should be used as required.

Speeches and presentations

A speech or presentation has three parts. They include:

Parts	What to discuss	Percentage
Introduction	What the speech or presentation is about – present key points and emphasise main ones	10%
Body	Explain what is happening - be clear – make sure link each part of the speech. Illustrate main points with points to reinforce perceptions and present your arguments	80%
End or Summary	Sum up the presentation or speech by using time to repeat and restate the summary. Make sure that you language is consistent the whole way through.	10%

Standards for references

All standards must be consistent. When you start a specific reference, citation, footnote or acknowledgement for a report or document, it is essential that you maintain the same style throughout the report.

Your organisation may have several different types of reference for different types of sources of information. For example, in some instances the name of the Journal may be presented in Italics. It all depends on the organisations procedures in regards to referencing.

Electronic referencing from on line sources is presented:

SafeWork Australia

URL Address: <http://safeworkaustralia.gov.au/Pages/default.aspx>

Access Date: 14.02.2012

Name of the website – Name of the author

Use the name of the website. If you reference a quote from a writer, you should reference the author's name. For example: Lloyd, P. this author's name is P. Lloyd. Write the surname of the author and the first initial of their name.

URL Address:

The URL Address means (Uniform or Universal Resource Locator). It is usually pronounced Earl. The URL is the web address of the website. For example; the URL Address for Safe Work Australia is <http://safeworkaustralia.gov.au/Pages/default.aspx> . When you enter the URL Address on a document, the document will automatically underline the URL Address after you add a space when you type it in or cut and paste it.

**Access Date:**

The access date is important. Web addresses are always being updated. By providing the access date you are letting the reader of your information know that on this date, this information was current. When a file is moved or a website is renamed or becomes obsolete. It provides evidence that on the date the internet was accessed, the website existed.

Printed referencing of sources is presented:

Journal (Please note that these references are samples only)

Piper, P (2010) Alpha to Omega, Journal of Living Dangerously (55, 15) p.36

Book

Piper, P (2010) Management by Objectives, Andersons' Ltd. United States of America p.45

1. **Author** - The author is presented as a surname of the author and the initials for his first name.
2. **Date** - The date is the date in which the issue of the journal and the book was printed.
3. **Article Date** - The article name is the name of the article
4. **Journal Name** - The name of the journal that the article has been drawn from is called the Journal Name.
5. **Series and Printed Number** - Does the article belong to a series? Many Journals will have a series number which will usually relate to the year of print. The article may also have a print number or version number.
6. **Page Number** - Make sure that you always include the page Number Using p. for page and the number of the page.
7. **Book** - For books that you are using as resource material, follow steps 1- 4. Step 4 should be the name of the text.

8. **Printer** - Who printed the resource? Make sure that you put the name of the printer so anyone reading your report can purchase or find a copy of the book. In the book reference above Andersons' Ltd is the name of the printer.
9. **Country printed in** - Enter the country where the book was printed. This makes it easier for personnel to find the resource. In the case of the book reference, the reference shows that the book comes from the USA

In the actual report, you site other authors as (Piper, 2010, p.36). This reference, advises all readers that in 2010, Piper wrote an article or text and the quote that you have taken can be found on page 36. If the author wants to read more about Piper, they refer to the References at the end of your report. They can look at the references and find the appropriate reference.

So what do you do if you cite a journal entry that has been downloaded off the internet?

Your organisation may have different procedures in this case. You should use both forms of referencing so that personnel will be able to access the information on line. For example:

SafeWork Australia

Piper, P (2010) Alpha to Omega, Journal of Living Dangerously (55, 15) p.36

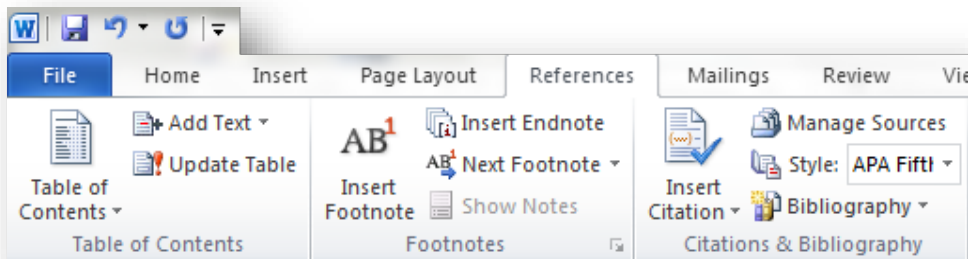
URL Address: <http://safeworkaustralia.gov.au/Pages/default.aspx>

Access Date: 14.02.2012

For examples and explanations of different referencing styles go the The University of Queensland Australia – Referencing Styles at URL Address: <http://www.library.uq.edu.au/infoskil/styles2.html>
24.02.2012

Standards for footnotes

Footnotes are used to provide references for articles. Footnote markers are links to references ([\[1\]](#), [\[2\]](#))



To add a footnote on to a document, open your Word Document

1. Right Click on References
2. Move down to Footnotes
3. Right Click on
4. Add reference.



Standards for citations

If you cite a reference in a reference, you can write (Piper, citing Jefferies, 2010, p.36). This means that you are citing Piper, who cited Jefferies.

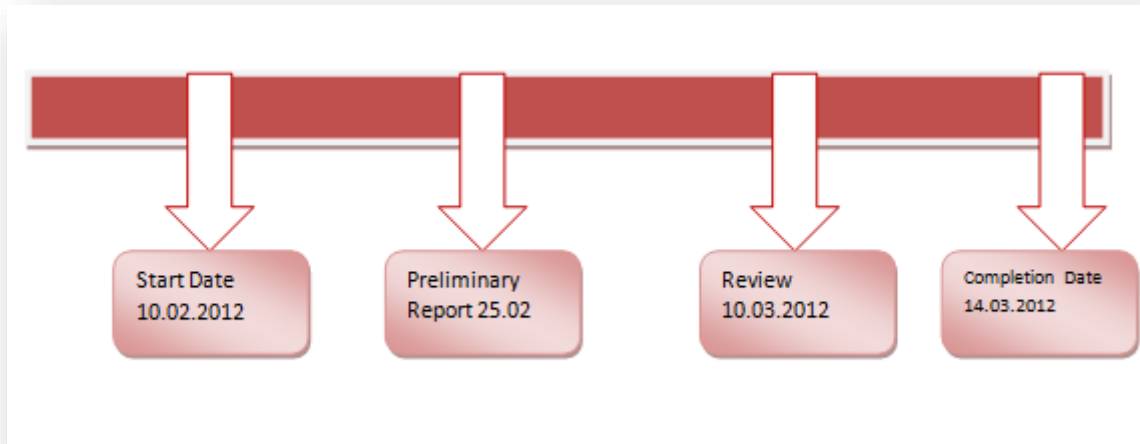
Samples of citations can be found in the Australian Guide to Legal Citation can be found at: <http://www.mulr.law.unimelb.edu.au/files/aglcdl.pdf> Access Date: 23.02.2012. Note: These are citations for legal citations

Standards for acknowledgements

Acknowledgements are used when parties actively take a part of the development of your document. They may have assisted you or gave you information. Acknowledgements can also be organisations and companies.

Time lines, including deadlines

A time line can be used to set up the tasks that meet your deadlines. They give you a visual of your priorities and can assist you in making sure that you complete your tasks on time.



To assist you in developing your time line, you can create lists. These are the basic rules that should be followed:

- Create a list of what tasks you need to perform
- Write down and follow-up items
- Carry forward any task that is not completed
- Keep track of any due dates
- Create a list of priorities
- Keep track of all of the tasks that are on-going
- Make sure that your work area is clean so you do not lose vital information
- Make sure that all of the current work is kept in the same location

File information that is no longer required into a folder to be stored. Delete any information that is not required.

Website text

Internet information is a different form of information medium. It is presented to you differently and it is important to know how you need to prepare web text so it can be absorbed. When you develop web text, you should use:

- Shorter sentences
- Clear headings and sub headings
- Use shorter paragraphs
- Bullet lists
- Highlight text that you want to emphasise.

One way in which web page text can be formatted is through Block Tags. To find out how to perform this task, go to URL Address: <http://www.tubetorial.com/html-block-tags/> Access Date 23.02.2012.

Word length

People are inundated with information every day, all day. Give details and references to support both side of the argument. Provide short definitions of information. If you babble on, they will lose interest and not pay attention to the document as they should.

Writing styles, including simplicity of English and use of technical language

Readability is important when you develop documents. For a document to be readable:

- **Use a direct voice, be active and make sure the wording is clear**
 - Emphasise the role of the user, write as a second person
 - Begin all steps and sub steps as verbs, using active voice and a positive command

This opposed	To that
<input checked="" type="checkbox"/> Enter access code access code	<input checked="" type="checkbox"/> You need to enter the access code

➤ **Use positive phrasing**

- Avoid too much negative phrasing

This opposed	To that
<input checked="" type="checkbox"/> Check your electrical cord for exposed wires	<input checked="" type="checkbox"/> Ensure that electrical cords do not have exposed wires

➤ **Use transitions**

- Use transitional expression to allow for bridging similar ideas

For example
First, check the electrical cord and then turn on machine

➤ **Use logically shaped and short questions**

- One sentence for each step. If one step covers two actions, make sure the actions are in the correct order

The correct way
Turn computer on, enter password

➤ **Use parallelism**

- Used to provide step to step instructions in a logical order

To turn on the computer:
1. Check electrical cord for safety
2. Press "on" button
3. Type User Name and Password in "Logon"
4. Press Enter

All business documents should be clear and concise. Writing business documents means that you need to know:


- The purpose and scope of your document
- Understand the needs of your audience and write the document according to their needs.
- The format and sequence of your document
- Get to the point immediately
- Get active and use fewer words
- Avoid the use of jargon unless you provide definitions
- Be clear
- Be objective
- Be concise
- Proofread for grammar and spelling errors
- Write conclusions and recommendations using supporting material.



1.3 - Establish means of communication

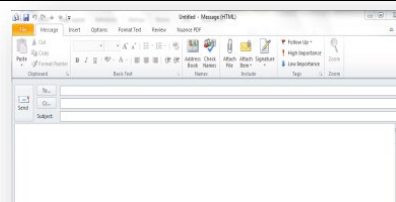
Once you have established who you need to communicate to, the way to communicate and how you are going to gain the attention of the personnel, you will need to determine the means of communication. Which software package would you use?

When you communicate, you need to consider the most appropriate package that will meet your needs. Listed below are three packages common to most organisations. By knowing what software options there are available and what each package will allow you to do, you will be able to choose the package that will afford you the most productivity.

Software packages as a means of communication may include:

Software	What you can do with the software
Spread sheets	 Microsoft Excel 2010 Spread sheets are an excellent way in which to make tables. Using columns and rows, you will be able to form graphs, set out data so it is easy to read and make calculations. Spread sheets are usually used in

Software	What you can do with the software															
	<p>business to calculate figures for:</p> <ul style="list-style-type: none"> ➤ Cost analysis ➤ Sales ➤ Budgeting <p>The spread sheet package can perform any task that requires the use of numbers and calculations.</p>															
Word processing	 <p>Most word processing programs give the functionality of increasing your productivity. Some of the options that you will find in most word processing programs are:</p> <table border="0" data-bbox="555 835 1172 1087"> <tr> <td>Dictionary</td> <td>Auto shapes</td> <td>Different fonts</td> </tr> <tr> <td>Drawing</td> <td>Different colours</td> <td>Bold</td> </tr> <tr> <td>Underline</td> <td>italics</td> <td>Mail merge</td> </tr> <tr> <td>Spell checking</td> <td>Formatting</td> <td>Designing tables</td> </tr> <tr> <td colspan="3">Inserting clip art and images</td> </tr> </table>	Dictionary	Auto shapes	Different fonts	Drawing	Different colours	Bold	Underline	italics	Mail merge	Spell checking	Formatting	Designing tables	Inserting clip art and images		
Dictionary	Auto shapes	Different fonts														
Drawing	Different colours	Bold														
Underline	italics	Mail merge														
Spell checking	Formatting	Designing tables														
Inserting clip art and images																
Database	<p>A database is a collection of data put together to put records together. This information is vital to the smooth running of an organisation. When you use a database information is made available at your fingertips.</p>  <p>Databases can also be used to form reports that can be standardised to meet the needs of the organisation. Examples of databases that your organisation has are:</p> <ul style="list-style-type: none"> ➤ Personnel systems ➤ Client and contact management ➤ Inventory control ➤ Accident/incident reporting 															
Email and internet programs	<p>There are many email software packages, like Outlook Express and Microsoft Office that you can use to send emails to clients, staff and management.</p> <p>There are many email software programs. Examples of components are</p>															



Software	What you can do with the software
	email software programs include: <ul style="list-style-type: none"> ➤ Journals ➤ Tasks ➤ Contacts ➤ Calendars ➤ Send emails

If you are not familiar with the communication software, hardware and devices, you should take steps to learn how to use it. Most software packages will come with help and written manuals. Hardware will usually have a user's instructor guide or a user manual. These manuals are designed to teach you how to use the equipment.

If you do not know how to use the hardware, software and/or software packages, you should take the time to learn how to use them correctly. This will increase your productivity and will make your job easier.

When you use any of these devices or packages to communicate with the required parties, you need to make sure that you communicate in the way that the party indicated. For example:

- A manager who is always on the run will not have time to stop and talk to you. The manager will want to thoroughly read a report and then make an appointment to see you if she or he has any questions. In this case, the manager may prefer to receive an email.
- Conversely, a client may prefer to receive a telephone call. The client may prefer the personal touch and they like to talk to you. If you send an email, they may in some instances ignore it.

1.4 - Determine requirements of documents

Before you write a document, take the time to find out what the requirements are before you start. Research how the document was developed and what the document was used for. What writing style was used to develop the document? Are the expectations of the document different now?



There are times when you are required to develop a document in response to the needs of a new end-user. Use the following methods to develop the document and determine the requirements of documents already established.

When you gather information, consult with the recipient to determine what they require. This could mean the end-user, customer or developer. Some of the information that you may require, includes:

- Who the target audience is
- Have an idea of what you are trying to achieve
- Describe the features of the document and what the document needs to achieve.
- Ask the end-user what they need the document for

As you learn the requirements of a document, take the time to gather the information by recording it. Basic information you should collect includes:

- The title
- Detailed description of what is needed
- Who recorded the information
- The source of the information
- Why is this information necessary
- Who will be impacted by the required
- What are the priorities of the document, according to your source

Classify the information into:

- What you are trying to achieve and the impact the document may have on other stakeholders
- What needs to be addressed or what is not really needed
- How to handle the issue
- What the assumptions of the document are and how to confirm assumptions.

Prioritise the information and negotiate as required. Each requirement should be balanced according to the:

- Desired outcome
- Stakeholders that are going to receive the document



- Costs
- How the document is going to be developed
- Whether the requirements of the document are clearly understood.

When documents are developed, you should include:

- 1. Introduction** - Discuss the purpose of the document and what it should be used for. Clearly state the background of the topic and provide information to support the purpose of the document so that it is understood. What are the boundaries and expectations of the document? Emphasise any issues that need specific attention.
- 2. Body** - The body of the document needs to reflect the introduction. If you are writing a report on safety issues, you may address areas of concern and then cite aspects of the law to support the reason why the issue is important. Discuss viable options – Both the positive and negative aspects of the issue. Explain constraints and list any assumptions that are made.
- 3. Conclusion** - Draw conclusions from your findings.
- 4. Recommendations** - From your findings draw recommendations. These recommendations must be based on facts taken from the body of the document.

The format of a document will change based on its requirements. For example, if you are writing a brochure, use the same process for finding out information. You may even perform a comparative analysis, but you will not need to draw conclusions. In brochures, the role of the writer is to provide sufficient information to ensure that the recipient can make a decision.

Care should be taken to ensure that all legislative requirements are reviewed to ensure that you meet your legal obligations under the law. These requirements will usually include:

- Making sure that all safety requirements are met
- Ensuring that all information is factual and not based on conjecture. You could be in breach of the sale of goods Act and the Trade Practices Act.



1.5 - Determine categories and logical sequences of data, information and knowledge to achieve document objectives

Sequencing refers to the flow of information throughout the document. Think of the time that you received a document and then spent a couple of hours trying to understand the message being conveyed. The message did not flow together. Instead the writer would make a recommendation but would not support their recommendation until three pages later.

How frustrated did you get with them? When you write a document, you need to not only consider that structure of the document, you also need to consider if the document is easy to read and that it flows together.

The sequencing and structure will be enhanced when you asking yourself the following questions. They are:

- Are there any inconsistencies in the font type including the headings and captions that you included in the document?



Also make sure that the artwork and graphics flow together by making sure that you:

- Proof read artwork and captions to make sure that words are spelt correctly with them
- Check that the spacing is consistent
- Ensure sure that text font is consistent across the different headlines

The way you present information to a reader, should not only hold their interest but be another way in which to emphasise important issues and suppress the unnecessary. Information can be presented in many different ways, and these include:

Categories and logical sequences of data, information and knowledge may include:

Arguments and rebuttals

Arguments and rebuttals are arguments for and against. These documents are where the author provides both sides of an issue. For example, you have been assigned the task of purchasing equipment for the organisation. After researching the information and comparing it against the organisations requirements and the specifications that fit the replacement model, you must give both the positive and negative facts in regards to the product.

Be objective and make sure that the facts are correct. When decisions are made based on these facts, you may cost your organisation a lot of money.

Categories and sequences traditionally used for the particular type of document being prepared

How was the original document written? Traditional sequences and categories can be found in controlled versions of the document templates or through historical data. What are the established ways in which information is presented in the organisation?

Some organisations do not have set procedures so you may need to either:

- Identify the correct template used to write the document
- Access information archives to find out how the document was written and presented. If you are lucky, the original writer of the document may have also maintained a record of how the document was written and the methods used to collect and present information

Chronological, alphabetical or operating sequences

These types of sequencing starts with presenting information in order from one point to another. Chronological order and alphabetical order is the appropriate order of date and numbers. Operating sequences refers to the sequences according to the assembly and correct usage of a product.

For example:

Chronological	Alphabetical	Operating
01.02.2012	a.	1. Press start button
02.02.2012	b.	2. Enter User Name
03.02.2012	c.	3. Enter Pass Word
04.02.2012	d.	4. Press Enter

Facts, observations, conclusions and recommendations

In each instance, when you write each of the above, it is essential that you use reference material to support your information. This means that when you make an observation, you should write what you see and the possible reasons for what is occurring. For example; workers were observed to not be happy with the way in which the problem was resolved. Every worker was very vocal in voicing their concerns and the lack of respect management has for the workers opinions.

Facts may include the specifications for a product. They are used to demonstrate that the product meets the organisations requirements. Slight variations in areas such as measurement, quality and price can influence the decision being made.

Conclusions are summations of document and provided a series of statements based on the findings of the document.

Recommendations and supporting arguments

Recommendations are derived from an analysis of the information taken from the document. They can include a recommendation and a series of references to support your argument. Supporting arguments can be results of case studies from other work environments, results from scientific research reports, either descriptive or statistical in form.

Illustrative case studies and other examples

Illustrative case studies and examples are used to clarify the intent of the information that you are trying to convey. Illustrative case studies serve to make an unfamiliar scenario, familiar and to give the reader a common language about the topic in question.

For example, when we discuss categories of sequence, we consider the shopping lists that we make up each week. When you are a full time student and on a tight budget, food shopping lists are usually prioritised in order of what you must have, should have and could have, so that the student purchases the items they must purchase to live.

Linking and summary statements

A summary statement is a statement summarising the full document. For example, a summary statement about this learning guide could be: This learner guide provides you with a step by step guide into introducing, writing, referencing, ordering, drafting, concluding and finalising the development of writing complex documents.

A linking statement is simply a sentence that ties up the end of the paragraph reminding readers on how a topic fits into the topic at the start of the document. For example: As you can see this product clearly demonstrates that it has the specifications and operational functions to meet production requirements.

The categories and sequential requirements of a document should clearly align with the requirements of the document. Like the rest of the document, all arguments, recommendations and conclusions must link together to form valid and reliable information that supports the requirements of your document.

1.6 - Develop overview of structure and content of documents

The structure of a document and the content of documents are linked together using tags. Headings, illustrations, appendices and tables can be shown in the table of contents. If the document is still in an electronic format you can click on the table of contents item and press control and the word processing program will send you to the Heading within the document.

If updated correctly in printed format, you will be able to identify where the heading or item can be found within the document.

Structure

The structure is the way in which a written document is formatted. Not all written records have the same structure. For example, the conventions of most letters will vary according to the type of letter and who the recipient is. Refer to Appendix Number Two and look at the formatting of the different letter formats in the templates. Notice that the positioning of the name and address, and the formatting differs. This is the structure of the document.

Document structure also includes not only the formatting, but the way in which information is represented when you put it together.

A good structure includes:

1. A solid introduction about what the purpose of the document is
2. Make sure that everything ties together
3. Organise material so that it flows together
4. Pull the reader in with clear, succinct information, correct use of white space, visual presentations and diagrams
5. Look through your research and identify if you have identified all of the appropriate topics
6. Use conclusions that are a logical sequence of everything that you have done before
7. Draw recommendations in a logical sequence and support your recommendations with appropriate references
8. Proof read and check against organisational requirements before you process

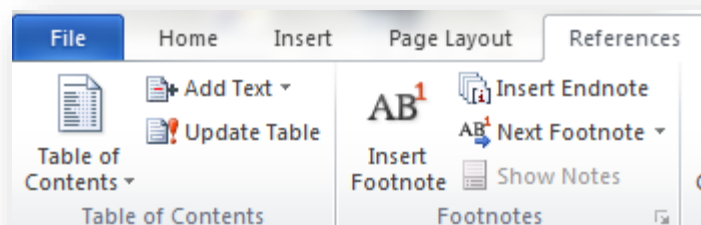
Table of contents

Information in a document is then marked up with indicators called tags so that you can find information in the document within a table of contents.

A table of contents must be laid out so that readers can navigate through a document to obtain the information that they require. A table of content can be a long term process. However word processing programs make designing a table of contents a time saving process.

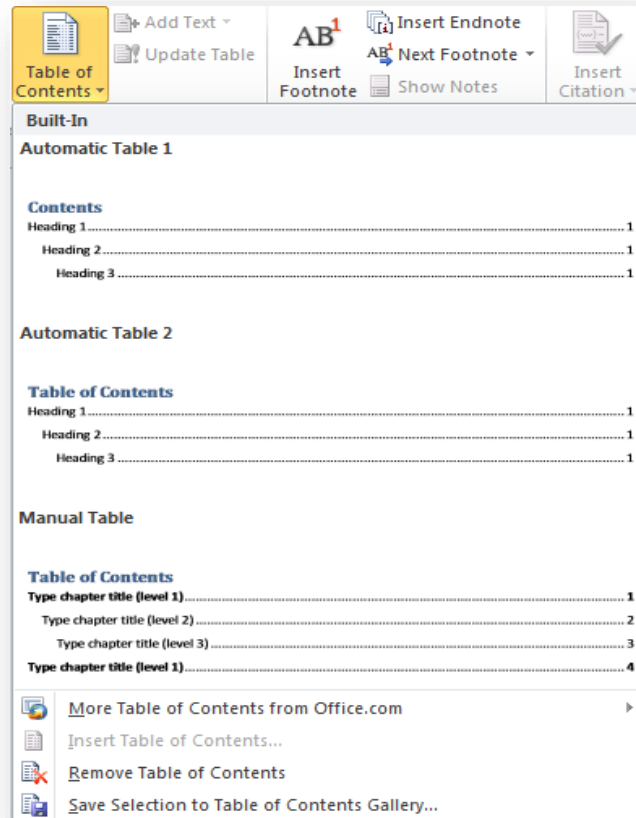
To open a table of contents:

1. Left click on references in Word Document



2. Move left to table of contents and point to Table of Contents
3. Click Table of Contents and the task pane will drop down.
4. Choose a table of contents and left click

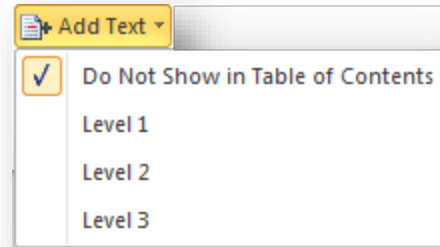
Set a table of contents where you would like it to be presented. Table of contents should appear after the title page and before the Introduction.



To control the Table of Contents, you can determine the Level of Heading that a Heading shall have.

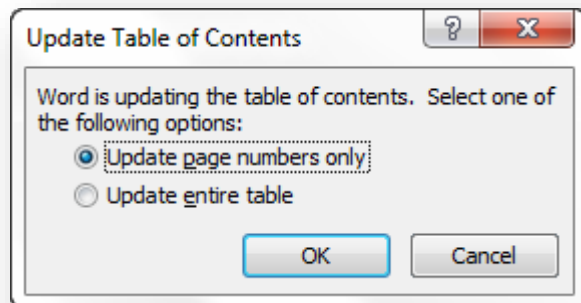
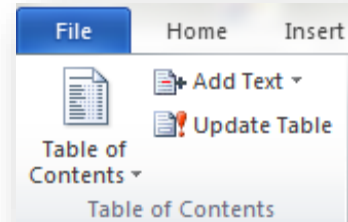
To control the Table of Contents:

1. Left click on Add text in the Table of Contents toolbar.
2. The task pane drops and choose the Level of Heading
3. Left click. You have now tagged the structure to the table of contents.



To include the Table of Contents, merely

1. Left click on Update Table
2. A second task pane will appear
3. Choose update page numbers only or update entire table



2. Draft text

2.1 - Review and organise available data, information and knowledge according to proposed structure and content

2.2 - Ensure data, information and knowledge is aggregated, interpreted and summarised to prepare text that satisfies document purposes and objectives

Organise information, data and knowledge into a proposed structure. Before you write a document, care should be taken to make sure that you put the information into an order that will reflect the flow of information that you are going to follow.

Review and organise data in the following order:

Familiarise yourself with the information and data. Note how the information is relevant to the purpose of the document and compare it to the organisational requirements. Make sure that your document is within the organisational requirements as well.

Identify patterns in the data and cluster information together. When information overlaps, you may try taking a copy of the information and highlighting it so you will find the main points easier to find when you require using them. (Remember your organisations policy on recycling and use the back of recycled paper when you take copies of the paperwork you are going to copy).



Identify patterns in the data and cluster them together. What pattern makes sense? How will you use the data? For example if you are performing a comparative analysis you may present information with the name of each brand, discuss the positives and the negatives of each brand in order using one paragraph to discuss both. Conversely, you may use specifications and format the information into a table.

Set up categories alphabetically so you can determine what the main categories are. For example, sorting information into online or offline information.

Sort the data into a logical sequence. Put data together and organise and sort it into appropriate folders ready for you to write the document.

Once information has been sorted, write the first draft of the document. Make sure that you keep focus on the purpose of the document, legislative and organisational requirements that will impact on the document.

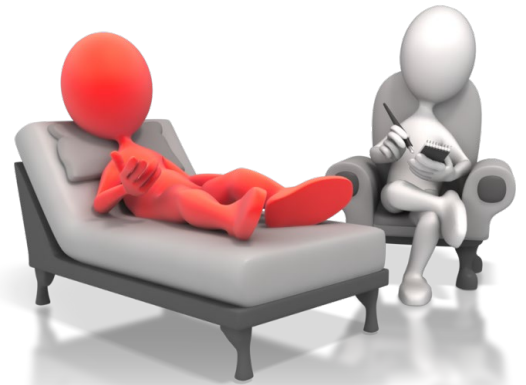
Interpret

Information may be interpreted in many ways. The priority of the way in which the information is interpreted will depend on the priorities set by the organisation. For example, emphasis on a choice of product may be based on price. Conversely the priority is based on the level of safety and then the consideration of price. Remember that when performing risk assessments, it is important to identify all of the levels of risk control for the hazard.

When this information is identified, then the budget allocated will influence which control measure will be put in place to minimise or eliminate the risk. This is where you should consider the organisational requirements as they should influence the way information is presented.

When you start interpreting information, make sure that you:

- Always start with a review of your goals, the reason why you are writing this document. This will assist in how you present the data. If you want people to fully understand how the document or purpose works, you could organise information into chronological order so that the reader can go through the data. If you are going to categorise data, categorise it according to the measure that will be used to evaluate the results.
- Attempt to put all of the information together and compare results from expected or promised or against other similar products that align with the goals of the document
- Consider worker recommendations to improve and discuss them in alignment with your break down of the information.
- Record conclusions and recommendations in the document and associate the interpretations to justify your results.



Summarise

To summarise is to say the same thing in few words. We are inundated with information all day every day. The aim of summarising is to read a longer document and to break it down into its main points. Try to summarise in your own words and write sufficient amounts to ensure that the information provided is sufficient for the recipient.

Aggregate

When you aggregate information, you need to consider all of the information that you have put together so it flows together.

Aggregate refers to the groupings of information and:

- Its logical sequence
- Headings and sub headings and how they relate to the purpose
- Objectivity of the information – your role is to provide facts and allow others to form answers. You should not influence a business document in any way. Even your recommendations should be based on facts, not on personal preferences. All recommendations must therefore be supported with recognised references
- Order and flow of the text and use of graphics (see Section 2.3 of this Learner Guide)
- Conclusions
- Recommendations.



All of the information must flow together and be understood by the intended audience.

Avoid some of the pitfall of writing, which may include:

1. Providing too much information
2. Rely solely on questionnaires to capture to full purpose
3. Interviewing for success.

Throwing away research results once the final document is generated. Results do not take up much room and can provide more information in the future when it is needed.

2.3 - Include graphics as appropriate

People understand information in different ways and presenting information in different formats will assist them in understanding information. For example, graphics can tell different stories by presenting trends, comparisons, geographic and technical data.

When using graphics you should ask the following questions:

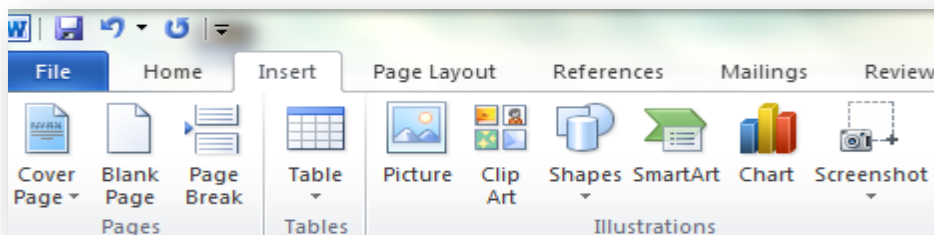
- What is the purpose of the report?
- Who is the audience?

- What are the key messages for the audience?

When you present data using graphics, remember three rules and they are to:

1. Keep it simple
2. What does the graphic need to communicate?
3. Not assume that people will read the text that accompanies the graphic.

You are working in a work place where many staff have English as a second language. You have responsibility to provide them with not just tables and works, but with graphics and other visuals that will clarify and can be used to reinforce the point that management is trying to convey. Different types of inclusions can be applied through illustrations on the Insert Tab in a work document




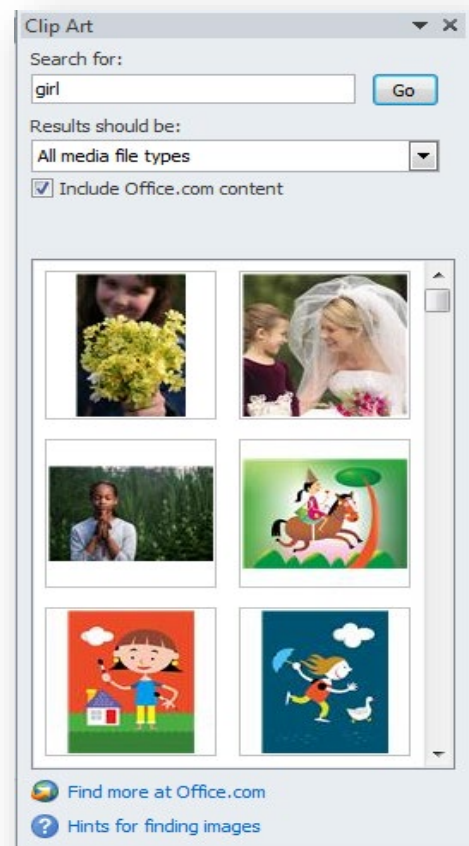
To open each icon within the illustrations section of the insert on the Microsoft 2010, you need to open Microsoft Word:

1. Move the cursor to Insert
2. Left Click and the toolbar will change
3. Move the cursor to illustrations; and write click

Before you use any illustration features, make sure that you follow the first three steps above.

ClipArt

1. Click 
2. The task pane Clip Art will appear on the right side of the screen.
3. Enter the Clip Art that you would like in Search for



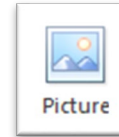
- Once you have chosen a Clip Art that you believe will suit your purposes, click on it once and it will open on



appear on the document that you have open

Picture

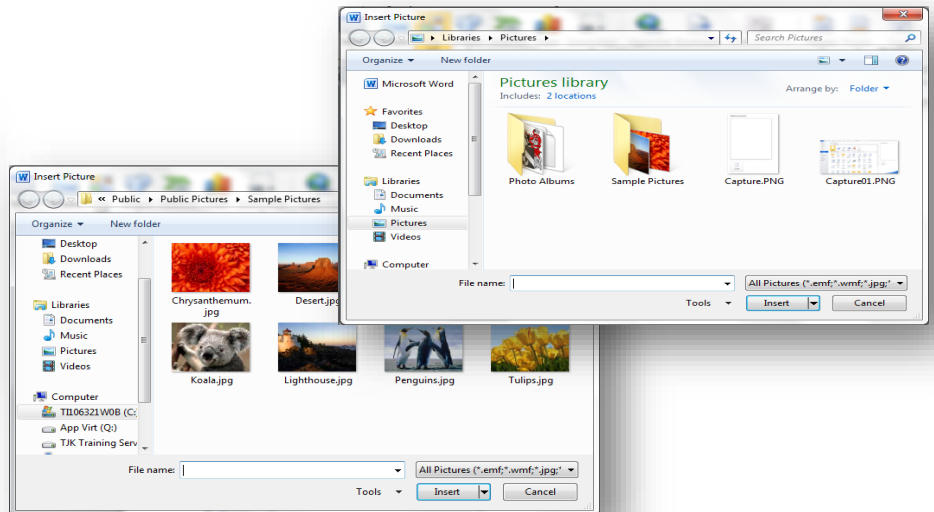
- Click



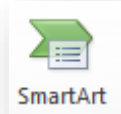
- Double Click and Pictures folder opens

- Double left click on appropriate file and it will open

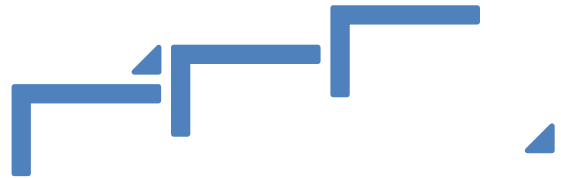
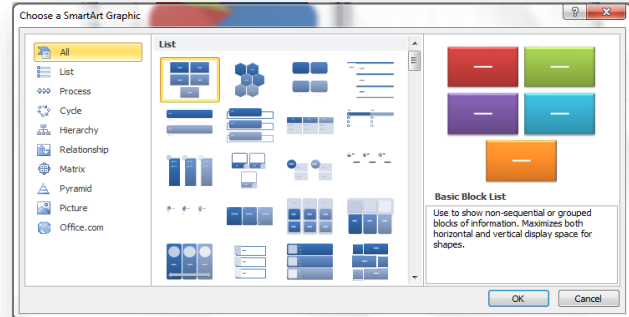
- Right click picture and it will



SmartArt



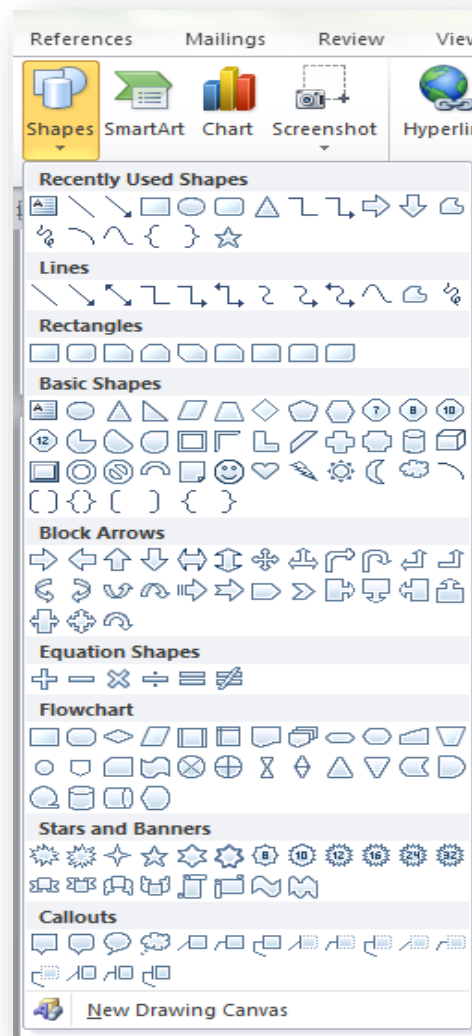
1. Click
2. The upper task pane, choose a Smart Art Graphic will appear.
3. Click on the graphic that you would like to use and the graph art such as the text will appear.




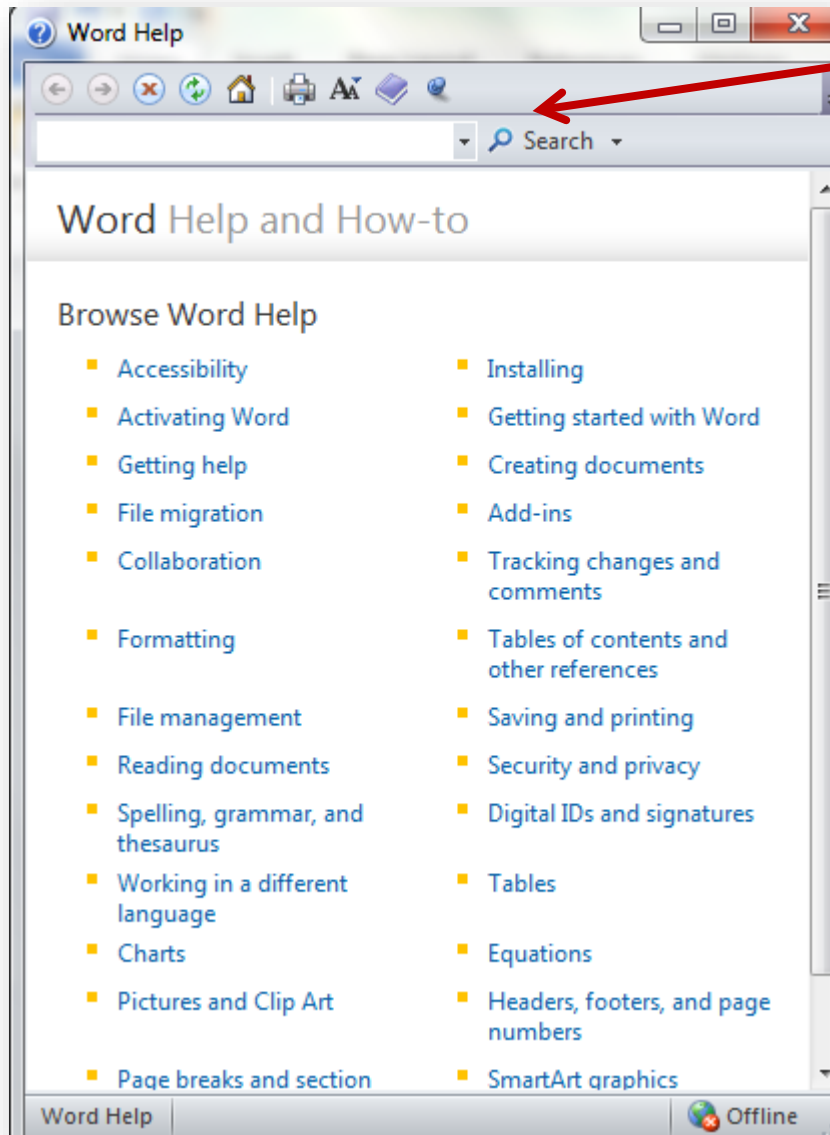
Shapes



1. Click
2. This task pane will appear on your screen
3. Choose the shape that you prefer ; and
4. Click on it



Practice using each of these icons in your documents as part of improving your written communication skills. If you would like to learn more about these formatting processes, refer to  on the upper right hand corner of the Word Document.



Use the Search parameter to provide you with information about how the package works. The program can be obtained on and off line.

If you are a learner who learns better with instruction rather than reading make sure that you are connected to the internet and you will be able to download video instruction on how to use the function within the program.

Common graphics can be used in the following circumstances:

	When to use
Bar chart	Good for comparisons Easy to construct
Illustration	Shows technical and geographic data Can show a lot of information in a small space
Line graph	Good for showing trends Good for showing the differences between groups
Photograph	Capture a picture to assist them in providing a picture of what is happening
Pie Chart	Good for showing perceptions

After you have created the graphic, ensure that:

- It is easy to understand
- That the information is easy to interpret if the audience is not familiar with the information is unfamiliar to them
- That there is sufficient white space around the graphic
- Whether the information is relevant to the text of the document

2.4 - Identify gaps in required data and information and collect additional material from relevant enterprise personnel

It is only when you are writing a draft of a document that you may become aware of information that you may be required to add additional information or data to the document that you believe is relevant to support you or reinforce other information or facts.

When adding information, ensure that it is relevant to the parties that it involves. Whenever you write a document, it is essential that you maintain the standards set by the organisation, legislative and regulative requirements and as the code of practice and privacy laws.



Breaching any of the legislative and regulative requirements can leave you open to fines and in some cases jail term. Remember it is also essential to follow your duty of care to ensure that your workgroup members confidential information is not accidentally passed on in the communication. In fact, remember that unless the worker has given their permission, you are not legally allowed to let anyone recognise them under confidentiality laws.

When you identify a need for information, it is important that you identify

- The source of the information
- Whether you are required to consult with people internal or external to the organization
- Whether you have access to the information
- The relevance of the information
- Whether you are required to obtain permission to provide the recipients with the information required.

If you are still learning to communicate with personnel in writing and you are consulting with a member of staff who may be operating as a mentor, trainer or coach, take the time to review the document with them. Their experience will assist you in ensuring that the quality of your work adheres to organisational standards. If you do not have the advantages of another person who you can consult with, then check your organisation's historical records to determine whether the information that you gathered is relevant and to check that the tone of the letter matches the tone that you have used.

2.5 - Draft text according to document requirements and genre

When a document is designed, it needs to appeal and attract its audience. If you know who the organisation's audience is, then you should be able to ensure that the templates obtain and retain the interest of the audience. Documents should be geared towards:

- **Simplicity** – Make sure that the document is short and straight to the point. Avoid using verbose words that the reader does not understand. They will quickly grow bored with the document and stop reading it.
- **Diversity** – The tone of a simple document can be changed by the words that you use. For example, instead of writing that “the product is bad,” you could write that “even though the customer did not like the product, a surprising interest was found by another target group.” This stimulates the readers and encourages them into reading the rest of the document
- **Balance** – Documents should be balanced in two ways. They include:



1. If you choose a picture on one side of the page, do not leave the area next to it white. The audience will become confused. Write about the picture by writing next to it and explain what the picture is about.
 2. Words can also be used to balance a document. There will be some documents that you will expect to have verbose words in it. To stop the audience from going to sleep when they read the document, use words that will maintain their attention.
- **Relative positioning of headings and graphics** - Headings should be clear and simple. They should ensure that the audience knows what you are trying to tell them. The graphics used to convey information should relate clearly with the heading. A graphic that does not relate to the heading can confuse the audience.
 - **Typography** –Typography includes the font that is used for the document. The most common forms of font are Times New Roman or Arial. When a font is chosen it needs to be legible. Small print or capital letters are hard to read. The audience may become bored reading the font in long documents.
 - **Text flow** – Text should flow together. Use headings as a guide to control the document. Disjointed words and sentences that change topic all of the time can confuse the audience. To avoid confusion:
 - Use one topic per paragraph

When you write the document, it is important that you remember:

- Who the audience is
- The purpose of the document
- How would you format the letter?
- What structure would you use?
- How would you use key points?
- What are the organisational requirements that you would need to consider?
- What method of communication would you use?
- What package would you use to communicate the message?

The way in which you structure and design the layout of your text documents should be a reflection of your audience. Make sure that the text is kept short and simple, taking care to ensure that:



- The page layout is consistent through the whole document. For instance, indented paragraphs should be used throughout the whole document
- White space is used to make the document more attractive and easier to read, by giving the reader time to pause and think about what they have read
- Typeface is used to make the document more attractive. For example, changing the colour of text or changing it to bold without making it look too busy.
- Graphics, photographs, clipart and drawings are used to prove a point
- Boxes are used to make points next to graphs and to add colour to the document
- Colour is used to highlight shape or main points.
- Headings are short and succinct telling the reader what is in the section below; and
- Columns are used to make lists of items.

The purpose of drafting a communication, especially when you do not have much experience and are not familiar with the legislation in the communication, care should be taken to ensure that no part of the communication is incorrect. Many supervisors and managers can lose their credibility if they do not adhere to organisational conventions and make sure that the facts in their communications are correct.

In the same way, as a worker you can also place yourself at risk by providing insufficient data where individuals make decisions. Those decisions can be high not only for the organisation as a whole not only financially, but also for their credibility and reputation. On a personal level, you could also lose your reputation if you do not ensure that you do a draft and then follow it up by proofreading the document.

Templates and house styles are two ways in which you can obtain assistance in your graphics and art. You may also need assistance in writing the draft. You will always find words that are hard to spell or you are not sure about. A dictionary can assist in spelling and can define a word so you can identify whether the word is appropriate for the subject matter.

There may also be times when you may know a word, but do not think that the word is appropriate. Refer to a thesaurus. A thesaurus will provide you with all of the nouns, adjectives and verbs that you need. The thesaurus will allow you to look up a word and then will list words that are similar to it. If you are unsure about a word, look it up in the dictionary.

2.6 - Use language appropriate to the audience

Visual graphics can assist you in communicating with personnel that have English as a second language. However, over the period of your professional life, you will be required to communicate at all levels of the organisation.

If you do not use language appropriate to the audience, you will not be able to obtain appropriate feedback. The feedback provided by your workgroup could influence your final decision. If they have not understood all of the information that they have received and you make decisions based on incorrect feedback, then your decision may not be informed.

When this information extends to uninformed work health and safety decisions, you could be found to have breached your duty of care.

The audience is the person who you are writing to. The audience may include:

Internal and external customers

An internal customer is someone who works for the organisation. This is your manager, your supervisor and your workgroup. An external customer is anyone who does not work for your organisation. This includes your supplier, any WHS consultants or specialists who are going to assist you or run an investigation with a hazard or risk in the work place.

This also includes the inspector who may be allocated by your State/Territory Regulator to investigate an accident or incident in your workplace. A customer is someone who enters your workplace. They may not buy anything, but they observe your operations and form opinions about your operations and your product.



Recipient/s who receive a copy for information

There will also be times in which you will need to send information to more than one person; For example, when you send an email to an external customer (Appendix Number One).

Anyone who requests a copy of the report or information will be CC which means carbon copy.

There is also an option to send the information to someone who does not want others to know that they received the information. This is BCC which means blind carbon copy.

When a recipient asks for a copy of an email, make sure that they are allowed to have that access to the information.

Primary recipient/s of the communication

The primary recipient is the main person who the communication is to. When you send information, it is essential that you communicate in the manner that they prefer. The primary recipient is the one that must receive the information.

This means that when you send a communication or communicate information you must consider the purpose of the communication and how they would like or need the information communicated.

3. Prepare final text

3.1 - Review draft text to ensure document objectives are achieved and requirements are met

3.2 - Check grammar, spelling and style for accuracy and punctuation

Flatter hierarchies' in organisations means that the formal roles of managers have evolved and more and more workers are becoming involved in writing business documents. As such, the review of documents is becoming more and more important

There are three steps that you should follow when you review a document. They include:

1. Read the document to see if it makes sense

When you think, you think faster than your fingers can type. As a result of this, words, phrases and ideas may be missed.

Make sure that all of the objectives have been reached and supported. This means that each time a finding or observation is made; it must be supported with facts that argue both sides of any argument. It is only through considering both sides of an argument that you can have an objective evaluation of the purpose of the document. Make sure that:

- A. You check that all points are supported
- B. That no part of the document will influence an answer.
- C. Make sure that all ideas are followed through to the end.



2. Examine the structure of the document

Make sure that sections are placed appropriately. If you feel that the argument does not flow smoothly, then you need to make sure that you review the order of the arguments to make sure that they flow together in the appropriate order.

Are your headings specific? Do they assist in letting you know where the document is going? Readers should be able to look at the headings and sub-headings and know where the writer is going with their document.

3. Check for inconsistencies in details

Inconsistencies can arise in many instances. You type faster than you think so spelling errors can arise that the computer's spell check does not automatically pick up. Inconsistencies may arise in:

➤ Grammar

- Grammar is the way in which the English language is structured. There are two types of grammar:
 - Descriptive grammar is the way in which we actually talk and write. Descriptive grammar relies on the patterns that underlie our use of words, phrases, clauses and sentences
 - Prescriptive grammar is the structure in which specific people feel it should be. Prescriptive grammar relies on what people believe are the correct and incorrect use of language.



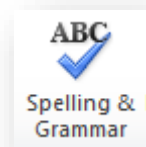
To practice your grammar, go to Learn 4 good Website at http://www.learn4good.com/languages/evr_english_grammar.htm Access Date: 15.01.12

➤ Spelling

When checking your spelling, you can access Spell Check on Microsoft Office. However, it is important to note that the spell checker has a reputation for not being able to deliver 100% of the time as errors can still be found after you have used it. Readers can become irritated with inconsistencies in spelling, such as between American and Australian spelling.

It is always good to read the document through once to identify irregularities in the spelling, font, text and numbers. Proofreading grammar includes:

- Remove jargon and slang from the document
- Spelling irregularities



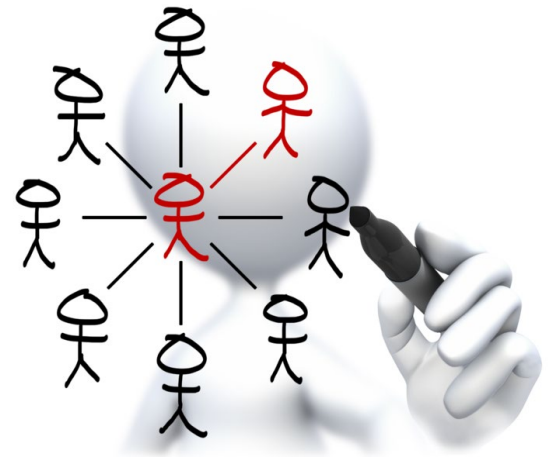
- Check the spelling of all names and the names of the business
- Take care to check the numbers carefully. In one instance, an organisation sent an email to its customer underquoting itself by \$10, 000 when a member of the work group forgot to add an extra zero to the end of the document. If calculations are being used make sure that the addition, subtraction or other math operations appear in text, doublecheck the figures.

The failure to check spelling and grammar can lead to expensive errors if they are not caught on time. Care should always be taken to double check all documents and care should be taken to make sure that the document goes to the correct recipients.

➤ Check Style of Writing

Make sure that you write in a consistent manner. You should use the style of writing consistently throughout the full document. Business documents must be professional at all times. The business writing style may include:

- Using short sentences (one sentence – one thought)
- Use simpler sentence structures
- Use an active voice
- Write from the organisations point of view
- Identify where you obtained information from, except where it is contrary to the Privacy Act 1988 and in contravention of section 271 of the WHS Act for legislative requirements – whereby the identity of a person remains confidential without their permission. If you use information from their files, no one should be able to identify who they are).
- Recommend actions rather than individual beliefs
- Avoid anything that provides you with self-doubt
- Avoid self-references or references from others



All of these areas should be checked to make sure that they comply with the organisations policies and procedures.

Check to make sure that all of your references are accurate. Technical details and prices of products and services, including quotes should be included if they are relevant to the report.

➤ **Check punctuation**

Verbally read the document if necessary to determine whether your punctuation is correct. If necessary, ask another member of your team to re-check your work.

Meeting Needs

Before proofing a document read it through first and re-check the layout. It is not only important that the document is clear and concise. The document needs to appeal to the recipient, encouraging them to read it. The use of graphics and art, the sequencing and structure of the document should all appeal to the recipient.

It is important to make sure that the language is appropriate, that the art and design of the document balances and that the content stimulates the end-user. Managers, clients and their representatives and any other people that you may communicate with usually receive a lot of emails, letters and other forms of communication every day.



In most instances, people will usually choose the documentation that appeals to them first. If your document is clear and concise and appealing to look at and read, then it will most likely be one of the first that will be read. When a document does not appeal to a person, they tend to put off reading the document until it is imperative that they do so.

For example, you have booked a consultation meeting with your workgroup. The message conveyed by the document is very important and you require feedback so that a final decision can be made in regards to the hazard.

Legislative requirements

While checking the draft, make sure that organisational requirements are met. These requirements may include

- **Ensuring that you are not in breach of any discriminatory laws.** This means that you must check the wording to ensure that discriminatory words are not used. Your organisation may have specific procedures that outline the words that should not be used.

- **Ensuring that no breach in copyright or confidentiality laws are breached.** Check to make sure that if you are handling a work health and safety issue that the name of workers are not released and that they are not identifiable based on your document. Breach of this law will ensure a fine if the issue is escalated to a complaint to a work health and safety investigator.
- **That the organisations communication protocols are met.** Check to make sure that you have considered all protocols such as whether you have breached your level of authority or whether you are including information that should not be in the report. Remember the communication protocols are in place to control the flow of communication. If you are not sure about information that you would like to include in the process, discuss it with your supervisor.

Technical requirements

Make sure that the technical requirements are correct. Entering a wrong price, amount of measurement can change the choice that a manager makes. If you are quoting for a job, an extra zero or a zero less can change whether you win the contract or not and in turn can change the ongoing operations of the organisation.



Organisational requirements

Make sure that the organisational requirements are correct and appropriate. This includes checking the formatting of the document, the way in which it is structured and the organisations procedures in regards to the visual presentations.

3.3 - Ensure draft text is approved by relevant enterprise personnel

3.4 - Process text amendments as required

In the policies and procedures of writing documents, you will be advised who you will need to obtain authorisation from before you process the final draft of the document.

Authorisation may be required from your supervisor for some decisions. However, under Section 47 of the WHS Act, “A person conducting a business or undertaking must consult, so far as reasonably practicable, with workers who carry out work for the business or undertaking and who are (or are likely to be) directly affected by a health and safety matter.

This duty recognises that workers input and participation in the decision-making process about work health and safety because they are familiar with the work area and can provide unique



ideas about the work area. As such, it is important that you share information with your work group with information relevant to them about minimising or eliminating risk in the workplace.

At the same time, you may be required to “consult, co-operate and co-ordinate activities with all other persons who have a duty in relation to the matter” (Section 48). This means that you should also consult with other personnel who have the same duties on the work health and safety issue that you are working on.

It is important to note that under the consultation process you do not have to include workgroup members or anyone impacted by the hazard in the final decision making process. You do however; need to take their views into account.

Under the Consultation process, you should also make sure that you address any concerns or questions that workers bring up within a certain time frame and offer feedback on any proposed options. Workers must also be informed of the final decision and the course of action to be taken, as soon as possible. This feedback must be informative and explain the reasons of your decision (Work Health and Safety Consultation, Cooperation and Coordination Code of Practice, 2010, p.10).

If you have to process the document for management, you can also use the final consultation process to clarify points, review decisions and discuss feedback with personnel. For example, if you provide feedback about a reason why you did not follow a recommendation from personnel and a work group member pointed out a problem with your feedback, you will be given an opportunity to update your draft before you generate information.

Some of the changes that you may need to make to your draft may include:

- Identifying the information that needs to be changed
- Add text
- Delete text
- Copy text
- Move text
- Change the style of your text.
- Change the formatting of text.



Identify text that you want to change

To change text, you will need to either, delete it, format it or move it. This means that you will need to identify the text that needs to be changed. When you do, then you need to press select. This is done by positioning the cursor.

To position the cursor

1. Left click the mouse
2. Use arrows on the keyboard to move around the screen
3. Ctrl + arrow key moves one word left or right, or one paragraph up or down
4. Home moves the cursor to the start of the line. End moves the cursor to the End of the line
5. Ctrl-Home moves to the top of the document. Ctrl-End moves the document to the end of the document

To select text

1. Hold Shift key down. Click where you want the selection to end
2. Hold Shift key down. Use any of the methods listed above to move around the screen
3. Double-click to select a word
4. Triple-click to select a sentence
5. Ctrl-alt to select the whole document.

Add text

Use the keyboard or mouse to position the cursor where you want to add your text, then type. If you select text, your typing will over-write the text that was selected

Delete text

Use cursor on keyboard or mouse to position the cursor. Press the Delete key to delete the character in front of the cursor. Press the Backspace key to delete the character behind the cursor. To delete a lot of text, select the text and press the Delete key.

Copy text from one place to another

1. Select the text you want to move
2. Choose Edit > Copy
3. Use mouse on the keyboard to the position where you want to copy the text to.
4. Choose Edit > Paste

Move text from one place to another

1. Select the text you want to move
2. Choose Edit > Cut



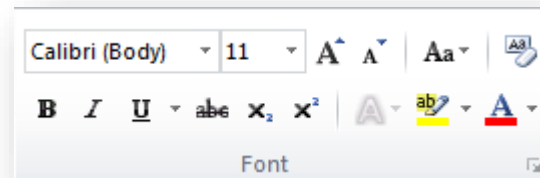
3. Use mouse on the keyboard to the position where you want to copy the text to.
4. Choose Edit > Paste

<http://www.shaunakelly.com/word/concepts/edit-word-document.html>

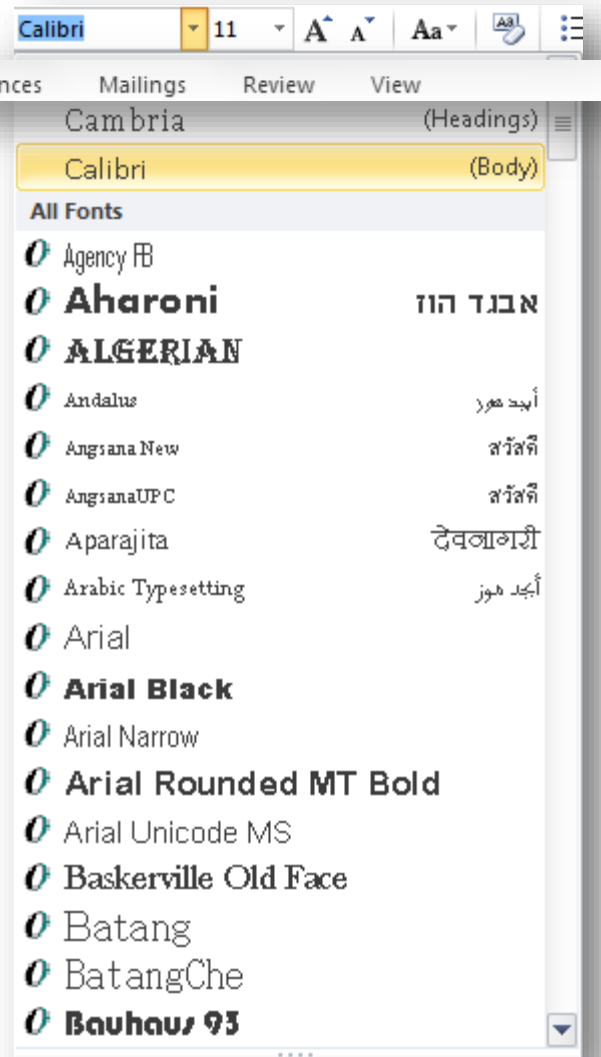
4. Produce document

4.1 - Choose basic design elements for documents appropriate to audience and purpose

4.2 - Use word processing software to apply basic design elements to text



Design elements are added to a document to grab the attention of the audience. To design a document effectively, you are required to ensure that



All of the following design elements will be found underneath the Home tab in Words Office 2010.

Design elements found in font under the home tab include:

Fonts

A font is the style of writing used in the text. Next to the choices of font, you are able to adjust the size of the text.

If you look at the task box, you will be able to see that the current font is Calibri, Size 11.

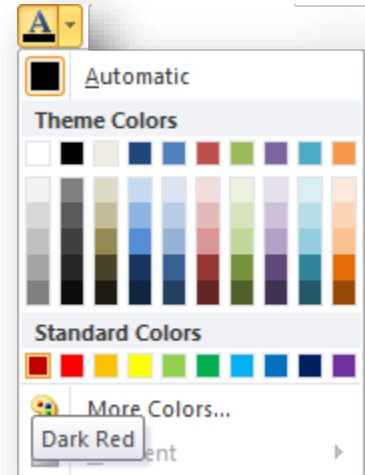
To change the Font:

1. Point the cursor at the arrow next to the font box and left click on the mouse.
2. The task pane will drop.
3. Move the cursor down the task pane and click on the appropriate font.

If you want to change the font on certain text, highlight the text before you perform actions 1- 3.

To change the **colour of the font**:

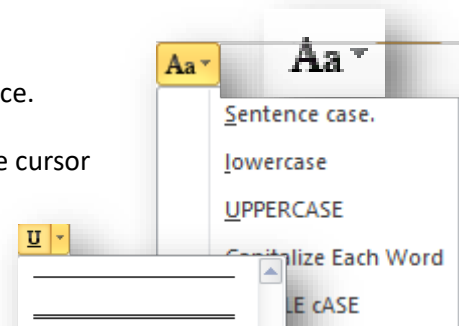
1. Highlight the text you want to change the colour of
2. Move the cursor to the colour box in font and point at the down arrow, left click
3. The theme colour pane will drop.
4. Point the cursor at the colour you want to change the font to and left click once



Capitals


To convert lowercase to uppercase you can use in the Font on the Home Tab. To change to capitals,


1. Highlight the capitals that you want to change
2. Move the cursor to the arrow next to the Aa and left click once.
3. Choose how you would like to capitalise the letters, point the cursor at it and left click your mouse once.

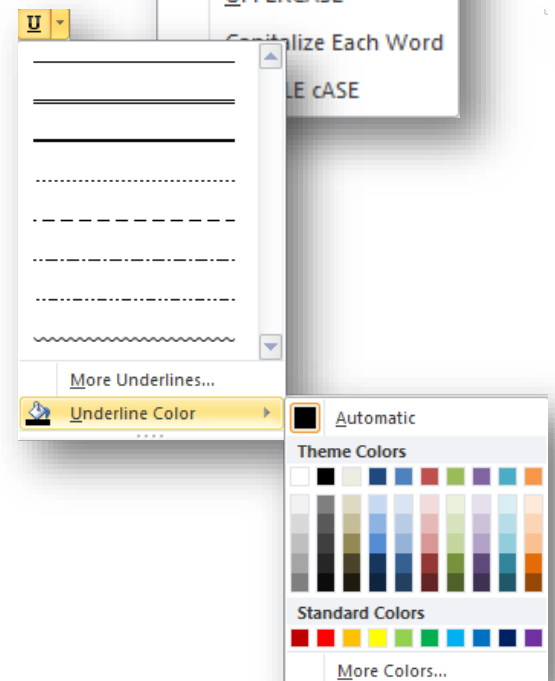


Underlining

To underline text,

1. Highlight the text that you want to underline
2. Move the cursor to  left click and the words will be underlined.

Change the thickness and colour of the underline by using this drop task pane, using the 

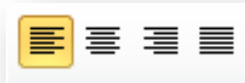


Justification and alignment

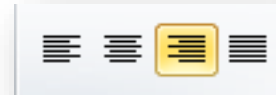
Under the Home tab, in Paragraph, right to the Font bar, you will find justification. Justification is the alignment of text on a page.



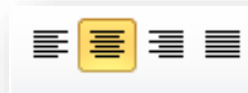
At this time, we are using left alignment.



Now we are using right alignment.



Now there is central alignment



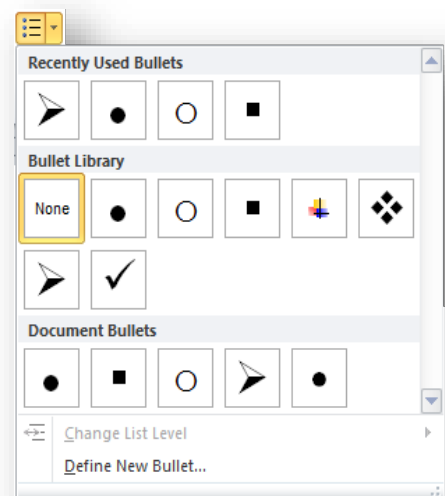
Lists

Lists can be found under the Home Tab on Paragraph between Font and Styles. Lists can be different bullet points. Bullet points can be either numbers, alphabetical or symbols or a mixture of all three.



To obtain bullet points,

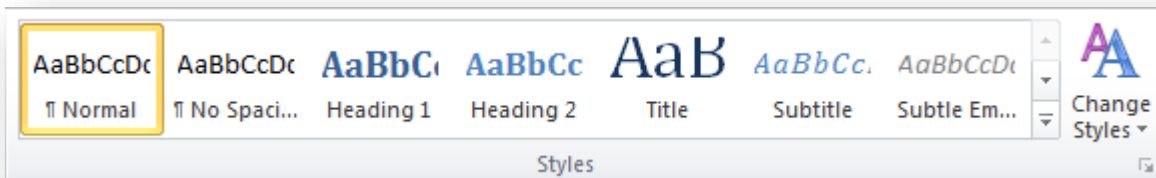
- Place the cursor where you want it to be on the page.
- Left Click on the downward pointed arrow.
- Move the cursor down to the appropriate bullet point
- Left Click and a bullet point will appear.
- Write your list.
- Complete the list.



- Point the cursor at the list again.
- Left click on the downward pointed arrow and
- move cursor down to None
- Left click.

You will no longer receive any more bullet points.

The following Styles are found in the Home Tab on the right hand side of the page.



Headings

The best way to add headings is to use styles.

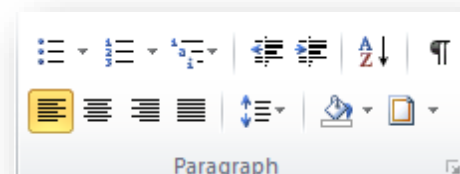
Quick Styles will give you heading styles already developed



Paragraph indentation

Paragraph indentation can be found under the Home Tab

In paragraph in the Home Tab, you will find this icon



By Left Clicking this icon, you can adjust the indentations. The arrow indicates the direction in which the arrow will indent. Point the cursor with the arrow pointing right and the arrow will tab in five spaces when you left click it.

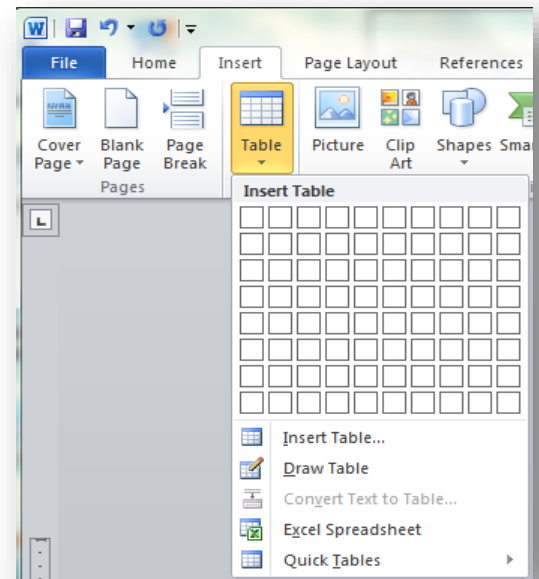
Don't like the look?

Point the cursor with the arrow pointing left and the arrow will tab back in five space when you left click it.

Tables

Tables are an excellent way in which to present information. To open a table in a word document once a word document is opened, go to the Insert Tab and move down to the tables toolbar:

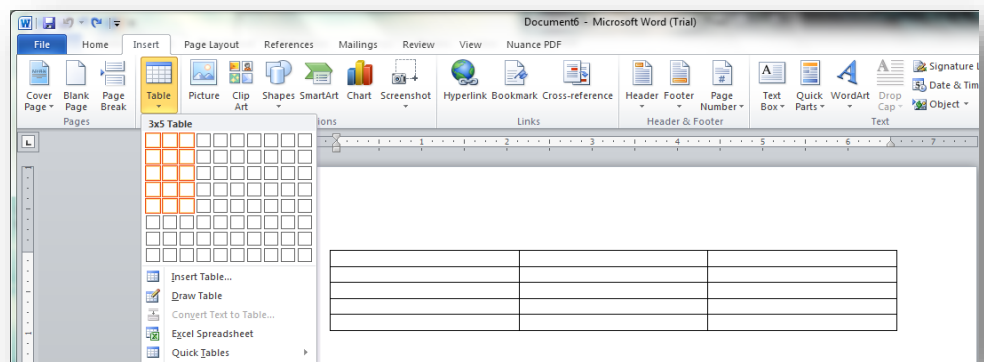
- Move mouse and use the pointer on Insert.
- Left click Insert and move cursor down to Table.
- Left click cursor and this task pane shall appear.



Tables can be designed in two ways:

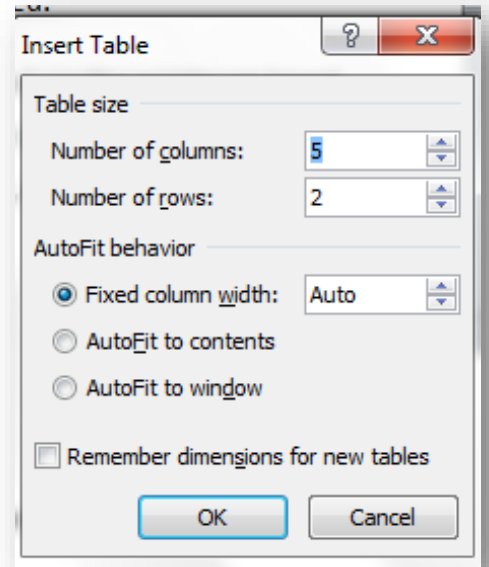
The first method is to move the cursor down the screen in the table.

- Highlight the box in the drop down pane for the number of columns and rows you require. *Notice; that the number of lines and rows match those that are available on the document.*
- Once you have the correct number of rows and columns, left click your mouse.



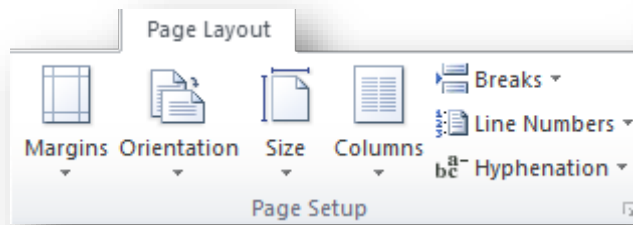
The second method is to:

- Perform the first 3 steps again
- Move the cursor down the drop pane and left click where it is highlighted.
- A new pane shall appear. Enter the amount of columns and rows you require and left click on OK. The table below shall appear.



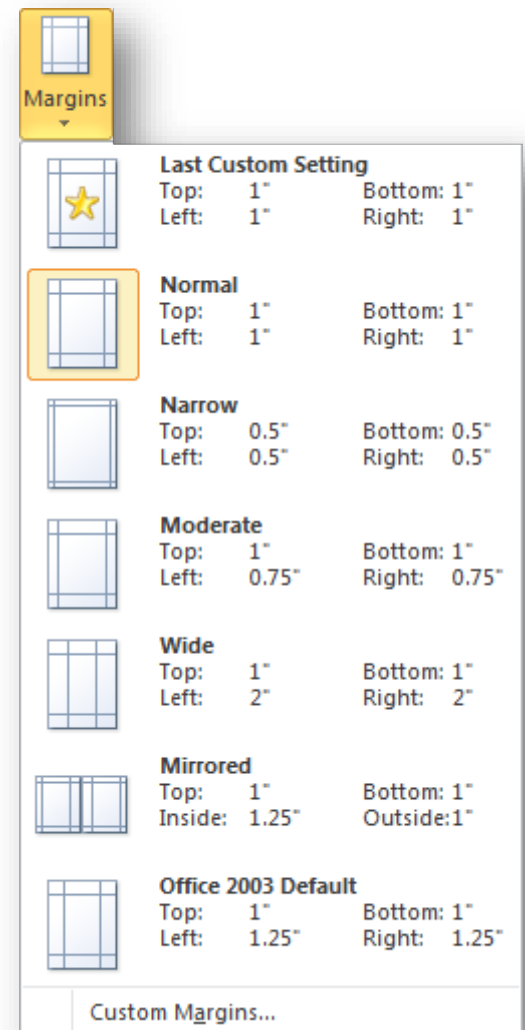
Margins

Margins can be found In the Page Layout Tab in Page Set.



To catch the set up for Margins:

1. Left Click the downward pointing arrow under the Margins tab
2. Move the Cursor down the drop down task pane
3. Left Click the appropriate Margin size



Use and amount of white space

White space gives breathing room for the eye and breaks up text from graphics. White space can be added to make a page less cramped and confusing.

Make sure that you do not leave too much white space. Experience with writing and developing documents can assist if you feel that you have too much white space, especially if you are new to using desktop publishing. Do not cram too much into a page, but ensure that you have enough space that important information does not get lost in all the text. If you need to put graphics into a document, try a larger page.

Create white space with

- Headings
- Margins
- Line and paragraph spacing
- Multiple columns

- Lists
- Tabs or indents
- Bullets & numbering

The following basic formatting designs can be found in the following sections of the Learner guide including:

Illustrations, photographs and other illustrative material for design purposes

To use design graphics, refer to Section 2.3 of this learner guide

Templates

To access templates, go to Appendix Number Two.

Logos, branding, organisational identity requirements

To find out organisational requirements, including logos and colour schemes, refer to Section 1.2 of this Learner Guide

4.3 - Check documents to ensure all requirements are met

As you develop a document, add and subtract information which may impact on your original planning. To ensure that you have taken into consideration all of the original requirements of the document, review it.

This means that you should ensure that you have:

- | | |
|---|--------------------------|
| Met all of the document objectives | <input type="checkbox"/> |
| Followed all of your organisations requirements | <input type="checkbox"/> |
| Not breached any legislative requirements | <input type="checkbox"/> |
| Chosen the appropriate means of communication | <input type="checkbox"/> |
| Adhered to document requirements | <input type="checkbox"/> |
| Maintained a logical sequence | <input type="checkbox"/> |
| Reviewed and organised information into a logical format | <input type="checkbox"/> |
| Made appropriate use of graphics | <input type="checkbox"/> |

- Identified and minimised gaps in information and data**
- Drafted and reviewed document text**
- Prepared final text – checked grammar and spelling**
- Obtained appropriate personnel approval**
- Processed text amendments**
- Used appropriate software**
- Checked document requirements to ensure that they were met**