TOPIC 8

Use business software applications

Learner Guide

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BSBTEC201 – Use business software applications

Application

This unit describes the skills and knowledge required to select and use software and organise electronic information and data.

The unit applies to those who use a limited range of practical skills with a fundamental knowledge of equipment use and the organisation of data in a defined context, under direct supervision or with limited individual responsibility.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Performance Criteria

Element *Elements describe the essential outcomes.*	**Performance Criteria** *Performance criteria describe the performance needed to demonstrate achievement of the element.*
1. Select and prepare to use technology	**1.1** Identify task purpose, audience, format and presentation requirements, and clarify with relevant personnel, where required **1.2** Select relevant technology and software applications to achieve requirements of the task **1.3** Adjust workspace, furniture and equipment to suit own ergonomic requirements
2. Input and process information or data	**2.1** Identify and open application, according to task and organisational requirements **2.2** Enter information or data into application according to organisational requirements **2.3** Ensure information or data is checked and amended according to organisational and task requirements **2.4** Format information or data using appropriate application functions according to organisational and task requirements **2.5** Use relevant help functions to overcome simple issues
3. Finalise and store document	**3.1** Review and edit final information or data, and prepare for storage in accordance with organisational and task requirements **3.2** Name and store document and exit application

Assessment Requirements

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- Select and use at least three business software applications on two occasions each.

In the course of the above, the candidate must:

- Select and use technology safely and according to organisational requirements
- Identify and address faults according to requirements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- Key features of:
    - organisation's work health and safety requirements relevant to own role
    - organisation's requirements for file naming and storage
    - applications used for organising electronic information and data.

Chapter 1: Select and prepare to use technology

1.1 – Identify task purpose, audience, format and presentation requirements, and clarify with relevant personnel, where required

By the end of this chapter, the learner should be able to:

- Identify task purpose, audience, format, and presentation requirements
- Understand the need to clarify information with the relevant personnel.

Identifying task purpose, audience, format, and presentation requirements

Technology is widely used in workplaces and has become integrated into many of the tasks that we do. The use of computerised systems and digital technologies is commonplace in most work environments. They are used to perform everyday functions, such as communications, and also for highly skilled technical work.

Technology hardware includes computers, tablets, printers, scanners, and digital storage devices. To enable these items to work, different software applications that allow you to carry out digital tasks and business functions can be used.

In the first instance, you need to know what the task is and which technologies are needed.

You will need to be clear on:

- The task purpose
- Who this is for (your intended audience)
- The format and presentation of the work.

For example, you may be asked to write a business communication.

You will need to know:

- The task purpose *(Let us say for this example it will be to inform on a business matter)*
- Who this is for *(a business client)*
- Format and presentation *(it needs to be formal and professionally presented using a business letter template)*.

This information tells you which equipment and software need to be used. In this case, it could be a page layout software that is accessed on a computer, laptop, or tablet. It tells you that this is a formal communication and needs to be professional in its appearance.

Knowing these points will give you the correct focus for the task.

Confirming the task

There may be times when you are given tasks that you are unfamiliar with or which lack certain details. When this happens, you need to clarify the task and seek any missing information. You should communicate with the task originator or the relevant person who can help you.

You may need to clarify:

- Who the audience is
- When the task needs to be completed
- What format the final work needs to be in (for example, a printed or electronic copy).

You may need to speak or communicate with your manager/supervisor to confirm tasks. At other times, you may need to clarify information with a colleague, an employee in a different work team or department, or another designated contact. This will depend on your work role, organisation, and business industry.

When clarifying or seeking information, you should:

- Think about what you need to know first to ensure you are prepared
- Identify the best way to achieve this, for instance, it may be better to speak face-to-face so you can discuss the task in real-time
- Construct your words carefully so your purpose is clear
- Be concise to prevent confusion or misunderstandings
- Ask questions and listen to responses.

<u>Task purposes</u>

Tasks will vary in nature and purpose. You should be trained to complete these tasks and how to use your organisation's digital technologies (organisational hardware and software).

Task purposes may include:

- **Communication:** Work personnel need to communicate for a variety of reasons and digital tools will be an important part of this. For example, employees can use communication technologies, such as telephone systems, video calling, email, content management systems for online information management, social media applications, and so on
- **Administrative work:** Many offices will use digital tools to manage and store information; cloud and other types of storage systems mean that information can be digital rather than paper-based, saving an organisation valuable space. Many tasks rely on technology, for example, task planning, workflow management, communications, and ordering materials and supplies. You may use applications, such as Microsoft Office, LibreOffice, OpenOffice (commonly used Microsoft software are Word, Excel, and Outlook). If an organisation needs server-related technologies, you may have

Windows Server, Exchange Server, and Microsoft Dynamics

- **Managing and organising data:** Organisations deal with data; this includes customer information, operational information, and financial information. The nature of data in the organisation varies. There will be technologies and software to handle data and this will need to be accessed by different work personnel in different roles.

  For example, to manage accounting data, accounting applications, such as FreeAgent, Quickbooks, and Xero, can be used. In general, Microsoft Excel can be used to manage data in a simple spreadsheet format. Employees can also use different project management applications, such as Microsoft Project, Trello, and Basecamp. In addition, most IT industries use data management tools, such as SAP or Oracle Data Management applications

- **Marketing:** Organisations need to promote their business, and one way to do this is through social media technologies; this can include posting comments, adverts, and news. They enable you to interact and reach your target market easily and more immediately. There are also design applications for creating communication, adverts, and promotions; this includes Adobe Illustrator, Adobe InDesign, and QuarkXpress. Other marketing activities can be used to collate marketing data, such as Google Analytics that tracks website data.

Format and Presentation Requirements

The format and presentation refer to the appearance and accessibility of the information. To explain this further, the format can relate to features such as the size of the page, where a heading will go, and if you have page numbers. However, the format is also used to specify the file format, for example, whether you supply an electronic document in PDF file format or as a Word file.

Equally, if you need to add or edit content on a website, you may need to add text tags to explain images for those with visual impairment. This makes information accessible and makes your organisation more inclusive. Key words and phrases must be used to make this clear.

Presentation is about how the information looks; for example, the font style, text size, colour, images, and text sections. How you position information will have an impact on how well this is understood. For example, a title at the top of the page is a logical position as information written in English will be read from top to bottom (other languages may require a different information order, depending on how this is read).

The format and presentation of work will depend on what it is for and how it will need to be used.

1.2 – Select relevant technology and software applications to achieve requirements of the task

By the end of this chapter, the learner should be able to:

- Identify examples of software and how they are used
- Select the relevant technology and software for your work tasks.

Technology requirements

There are different technologies and software applications available in the market. An organisation must select the relevant applications to suit its requirements. In an organisation, the employer, or the relevant person with decision-making powers, will authorise the acquisition of these.

Technology should be:

- Reliable
- Secure
- Accessible
- User-friendly
- Easily integrated into the workplace *(so it can be used alongside other technologies)*.

Selecting the right technology and software applications

Depending upon the tasks that are performed in an organisation, the relevant technology and software application needs to be selected. You will have hardware and software in your work area, which you are required to use. This may be your own workstation, or it may be a shared space. This should include the technology and software that you need to use. You will need to choose the correct types as suitable for the task.

Some of the software applications for communication are provided in the following table:

Technology	Software application	Explanation
Email	➢ Microsoft Outlook ➢ Gmail ➢ Mozilla Thunderbird	Electronic mail – to send messages quickly to internal and external contacts.
Online chat	➢ WhatsApp ➢ Skype for Business ➢ Google Hangouts	Online instant messaging – this can be used to connect with and send messages to others; employees can use these applications on smartphones or computers.

Video calling/conferencing	➢ Zoom ➢ Skype for Business ➢ GoToMeeting	Video communication – this is with one or more persons. It allows you to have a virtual meeting online. Employees can use these applications on their smartphones or computers.

These applications can be used for communication within an organisation or to communicate with clients.

Let's focus next on administrative work. This work will vary depending on the roles and responsibilities.

Some of the software applications for administrative work are provided in the following table:

Technology	Software application	Explanation
Desktop application	➢ Microsoft Office (Word, Excel, PowerPoint, Access, Outlook) ➢ LibreOffice (Writer, Calc, Impress, Draw, Math, Base) ➢ Apache OpenOffice (Writer, Calc, Impress, Draw, Math, Base)	These are applications that you use on the desktop (i.e., your computer). Programs will be easily accessible for tasks; these include the following examples (other brands/types exist): ➢ Microsoft Word (page layout software) ➢ Microsoft Excel (spreadsheet software) ➢ Microsoft PowerPoint is (presentation software) ➢ Microsoft Access (database software) ➢ Microsoft Outlook (personal information management software, including email, calendar, meetings, and task planning).
Note-taking application	➢ Microsoft OneNote ➢ Evernote ➢ Google Keep	These are used to note down and collate information, such as text, images, and audio; this is then organised and can also be shared with others.
Server application	➢ Windows Server ➢ Microsoft Exchange Server ➢ Apache Web Server	This type of application runs in the background. It ensures that desktop applications work and function as intended. These are managed by IT personnel.

One of the most commonly used software applications for data management is Microsoft Excel. Organisations also use other applications for data management depending upon the nature of the work.

Some of the software applications for data management are provided in the following table:

Technology	Software Application	Explanation
Accounting systems	➢ FreeAgent ➢ Quickbooks ➢ Xero	Accounting applications are used to manage and track business expenditure.
Project Management systems	➢ Microsoft Project ➢ Smartsheet ➢ Trello ➢ Basecamp	Project management applications help track the progress of individual and team projects within the organisation.

1.3 – Adjust workspace, furniture and equipment to suit own ergonomic requirements

By the end of this chapter, the learner should be able to:

- Understand the term 'ergonomics'
- Set up a safe and suitable workspace.

Ergonomics

Ergonomic is the term used to describe a safe designed work environment. It is about the study of what makes an environment efficient and safe to use so it does not cause harm to the physical body.

For example, this is commonly seen when an office chair is adjusted to suit the user. This includes making adjustments to the height of the seat, the tilt of the back and seat, and the height of the armrests. Small changes to suit individuals will help to prevent causing strain and stress to the posture and body.

Another example is how you would position furniture and items in your workspace, so you do not have to twist, reach, or work awkwardly. When items are positioned comfortably and in the correct order and position for work sequences, you can work effectively and productively.

You should think about:

- Where furniture and equipment are most logically positioned
- How you will use the area, so you have safe access in and around items
- The height and settings of adjustable furniture/equipment and how these need to be positioned for your comfort
- Where to place small items of equipment, such as a telephone or work trays, in order to minimise reaching across work surfaces
- Lighting and ventilation, such as where natural light falls across desks, whether artificial lighting is positioned out of your line of vision, and making sure there is ventilation space around digital equipment.

<u>Digital devices and ergonomics</u>

Ergonomics in regards to using digital devices will be primarily concerned with posture, especially prolonged periods when using devices such as computers, and also eye health from using screens. This is why breaks from digital devices are important; you should break posture and move to have a rest and refocus your eyes. This can be done by taking a quick break or changing to another task that is completely different and does not include using a device. It is also recommended that you release musculoskeletal tension by stretching or performing ergonomic exercises. These will vary, but they are simple stretches or movements that help you to counteract the position/posture that you have been in.

Ergonomic issues that impact the use of digital devices include:

- Posture and position while using and typing on devices, causing possible musculoskeletal injuries and strains, such as neck, shoulder, wrist, and back pain; for example:
  - looking below or above eye level for long periods
  - leaning forwards or backwards (the back should be supported in an upright and neutral position)
  - twisting or leaning to one side (see the above point)
  - elbows not at a 90 degrees angle, meaning that arms are not properly supported
  - feet not flat on the floor, putting legs in a position that may cause stress
- Possible eye strain; for example:
  - glare and reflection on device screens and displays
  - poor lighting that causes reduced visibility
  - badly positioned screens, such as a distorted angle.

Ergonomics comes under work health and safety, and your organisation should assess the workspace to make sure this complies. Your organisation has an obligation to make sure you are safe at work and will have access to information for this purpose.

Arrangement for an ergonomic workspace

An employer should consult with employees to make sure their workspace is ergonomically set up. In discussions with your health and safety person or by reading information on setting up an ergonomic workspace, you will be able to see what needs to be done to achieve this.

This will include:

- Furniture (such as desks, chairs, and equipment)
- Lighting (type, position, brightness, etc.)
- Ventilation (there should be adequate ventilation and fresh air for your comfort)
- Temperature (the room/space should be comfortable to work in; there will be a temperature range that the working environment should be within)
- Space and access (the space used and in and around furniture/equipment).

See the appendices for some further information on ergonomics. You can also visit Comcare at the following website link for Government guidance: Ergonomic hazards | Comcare.

Chapter 2: Input and process information or data

2.1 – Identify and open application, according to task and organisational requirements

By the end of this chapter, the learner should be able to:

- Identify the application on the computer or device
- Open the application ready to start the task.

Identifying the application suitable for the task

Organisations use multiple applications for a variety of tasks. If you have your own work computer or device to access applications, you will quickly become familiar with their location on the desktop or device. Applications that are used regularly will most likely be found on the desktop either as a file icon on the screen or in a task/menu bar. The icons will consist of a graphic symbol or letter to help you identify what these are. They may also be identified by their colour.

If you are using a shared device, you may have to look for the application. You can use a search function if this is not easily found. Existing work files can be opened by clicking or tapping them, and this will also give you access to a particular application. Search functions are usually found in task/menu bars or you may be able to right-click the desktop to obtain this.

When the correct application is found you should open this to begin your task. As mentioned, you should be given training to do this along with how to use your organisation's technologies.

For example:

Consider an organisation that produces written communications, such as a newsletter. To create content, you will need to add text, graphics, and images. This will be developed using page layout and/or design-related software.

This might include desktop publishing software, such as:

- Microsoft Publisher
- Adobe InDesign
- Adobe Photoshop
- Adobe Illustrator
- Scribus.

Many organisations use Microsoft applications, although others are readily available. Some business industries also have bespoke software that has been developed and built to work with specific types of machinery and technologies.

Opening the application

Depending on the computer, device, and operating system, applications can be opened in different ways.

For example, you might need to:

- Use the mouse to double-click the application (or a file that was generated in the application) to open this
- With a mouse, search for the application in a folder or task bar (from a folder, you can double-click this to open it; an application in a task or menu bar may only need to be clicked on once)
- Look for the application in the start menu and click on this once with the mouse
- Tap once on the application on a smart device.

Looking at a specific example, Microsoft Word on a PC can be opened by:

- Clicking the **Start** button in the bottom left-hand corner and typing **Word** in the search box
- Clicking the **Start** button and then scrolling down the application menu to select Word
- Pressing the **Windows** key and **R** key at the same time to obtain a dialogue box that allows you to type in what you are looking for (in this case Word); type in 'WinWord.exe' (no quotation marks) and this will automatically open the application.

(Source: https://smallbusiness.chron.com/five-ways-open-microsoft-word-42092.html Accessed on 18.08.2021)

Now, the user has the application open and ready to use.

2.2 – Enter information or data into application according to organisational requirements

By the end of this chapter, the learner should be able to:

- Type or input text, images, and data into the open application.

Entering data into the application

With the application open, you can start your task. This may be entering new data or information into an existing file, or it may be editing the information or data that is already there.

For example, if you needed to add a work progress note to a customer's record in a customer database, you would first need to locate the correct record. This may be through a search function or by clicking through to the correct page in the open database. Once located you would then add your note.

Finding your file

However, in the open application, it may be necessary to select the correct file from a folder. To do this, you may need to go to the 'File' menu, select 'open' and then search through folders on the system to find the document you need. You can then open this into the application.

Alternatively, back on the desktop, you may be able to locate the file from its folder and then open this directly.

If you are creating a new document, you will need to select the correct template or set up the document according to organisational instructions.

Entering information or data

When entering information and data, you must make sure this is entered into the correct information areas or fields, and that you follow the correct data formats. You must check that information is entered correctly and that any previous information or data is not lost in error.

Each application will have its own features and functions for entering information and data. This will include using the mouse to click and locate where you want to place it, and it can include using the tab keys on the keyboard to move along and across information fields (such as a database) until you find the right place.

You can then type in new information or data, or you may want to copy this in from another file. To copy text, you can simply scroll over the text to highlight it and then either press the 'Ctrl' key and the 'C' key at the same time (on an Apple keyboard it will be the 'Command' and 'C' keys) or you can right-click on the highlighted text and then click on the 'copy' option in the menu. In the place where you want it to be, you can then press 'Ctrl' (or 'Command') and the 'V' keys at the same time or right-click and select the correct paste option.

For example, to enter data in a Word document:

- In the open document, place the cursor at the position where you want to enter the text
- Type the data
- To replace a single word, double-click the word to highlight this and then type the new word in its place
- To replace a line, click to the left and scroll across the line to be replaced, once highlighted, you can then type to create a new text line.

(Source: https://support.microsoft.com/en-us/office/add-and-edit-text-ed1e3147-a846-41ca-8087-49e324cb50bd Accessed on 18.08.2021)

You may also have images that need to be included. Images and graphics will apply to desktop publishing tasks, and they may be used in documents and presentations.

Inserting images

Images may be required to illustrate content or to convey information. These are best accessed from your computer or a shared drive. This way, you have access to them easily and can create a library of images. You can upload or save these to your computer before adding them to the document. It is also possible to get images directly from the Web.

Using Microsoft Word (and PowerPoint) for this example.

To insert images stored on the computer:

- Place the cursor where you want to insert the image
- Click the **Insert** tab
- From the **Illustrations** group, click the **Pictures** icon
- From the menu that appears, click **This device**; the **Insert Picture** dialogue box will open
- Navigate to the folder where the images are stored
- Select the image that you want to insert
- Click the **Insert** button; the image will appear in the document.

To insert images from the Web:

- Place the cursor where you want to insert the image
- Click the **Insert** tab
- From the **Illustrations** group, click the **Pictures** icon

- From the menu that appears, click **Online Pictures**; the **Online Pictures** dialogue box will open
- In the search field, enter the keywords to search the image
- From the resulting images, select the image that you want to insert
- Click the **Insert** button; the image will appear in the document.

An option to add stock images is also available; follow the instructions as shown for the web option, choosing 'Stock Images' rather than 'Online Pictures'.

(Source: https://support.microsoft.com/en-us/office/insert-pictures-3c51edf4-22e1-460a-b372-9329a8724344 Accessed on 18.08.2021)

Note: Care should be taken by you/your organisation when accessing images online. You will need to check if these are copyrighted and whether permission is needed to use these for commercial purposes. Your organisation may need to pay a fee to the owner of the image to do this.

Graphics

At times, you may need to create graphs or tables to show data. For example, these may be required to show organisational growth or sales. Data can be inputted into graphics in applications that have this functionality. A graphic chart can be selected and styled; all you will need to do is to input your data.

Page numbers, headers, and footers

The user can also insert page numbers, headers, and footers into page layout document files. Page numbers help the reader to find information in the document. Headers allow you to repeat information at the top of the page, such as a title heading. Footers allow you to add footnotes and references.

2.3 – Ensure information or data is checked and amended according to organisational and task requirements

By the end of this chapter, the learner should be able to:

- Check and correct information and data according to organisational and task requirements.

Checking your work

After you have inputted the information and data, you will need to check this is correct. This is an important step in the task and must not be missed out on. You should look over your task instructions or steps and make sure you have completed this as needed.

Checking information and data will depend on what your task is; it may include making sure:

- The information and data have been entered, added, or edited correctly
- The information is accurate in spelling and grammar
- The information and data are written in the correct style and format
- The information and data are clear and fit on the document page or in the correct information fields.

To do this you can use a combination of application and user checks. Firstly, you may want to run a spell and grammar check on the device, if the application has this functionality. You should then read and check through your work, either on-screen or a printed copy.

When checking this yourself, you should perform a series of checks to look for the individual elements in turn. If you try to check everything at once, you will be more likely to miss something as there could be too much to look at in one check.

For example:

- Firstly, you might want to check the spelling
- Secondly, you might want to check the grammar and meaning
- Lastly, you might want to check this for layout and style.

If you are checking numerical information, you should take care to check number formats and any decimal place positions. If numbers relate to measures, you must ensure you use the correct measurement types, and this is specified where needed.

Amending your work

When errors are found, you should rectify these immediately and then check your work again. You should check that information and data are inputted correctly and that you have not changed anything else that does not need to be. Care should be taken to select just what needs to be changed, and nothing else. It can be useful to complete the whole checking procedure again if the document or work is lengthy or includes many elements. If the work is simple and short, just checking what has been corrected may be enough.

If you find a spelling error, you will simply need to correct the spelling; however, if you think this may be found elsewhere, you should check through the document or run a spell check/text search function to find any other occurrences of this. If you need to input data figures, you may also need to check that calculations or data results have also been updated. All work should be saved, logged, processed, and stored as required in organisational information and work systems.

2.4 – Format information or data using appropriate application functions according to organisational and task requirements

By the end of this chapter, the learner should be able to:

- Format data or information using application functions.

Formatting data or information

Once the user has checked and amended the information, the next step is to format the information or data. Formatting is used to change the layout and/or arrangement of information and data. This ensures that the information is presented correctly for organisational use.

Application functions may include:

- Applying:
  - font style
  - font size and colour
  - heading and text styles
  - text alignment (such as text arranged to the left)
  - bold or underline text features
- Separating information or data into specific document/record features, such as columns, rows, tables, paragraphs, information fields, graphics, and so on
- Using data for creating graphs and charts
- Arranging information and data into a specific order
- Applying data formulas or calculations
- Sending information to other users.

You should follow task instructions to format your information; you may have an organisational formatting or style guideline for some of the work that you do. For example, this will tell you how information needs to look and be presented in documents.

Formatting will require you to follow specific steps in the software program; applications differ but all will have a logical process to apply formatting.

Using Microsoft Word as an example, to change the font style, size, and colour in a document:

- Select the text for which you want to apply the formatting
- On the **Home** tab, from the font drop-down list, select the font
- From the font size drop-down list, select the font size

- From the font group, click the font colour icon
- From the colour pallet, click the font colour.

The user can also format the text as a bulleted or numbered list.

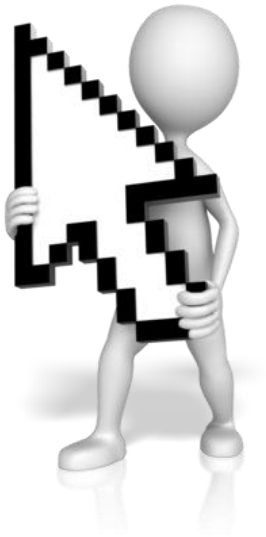
To format the text as a list in Word:

- Select the text that you want to put into a list
- On the **Home** tab, from the **Paragraph** group, click the **Bullets** or **Numbering** icon.

The user can add a border to pages *(or images, boxes, and shapes)* in the document to make it more appealing.

To add a border in a Word document:

- Click the **Design** tab
- From the **Page Background** group, click the **Page Borders** icon. The borders and shading dialogue box will appear
- Under **Setting**, click the required option
- From the **Style** list, select a style
- From the **Colour** drop-down list, select a colour
- From the **Width** drop-down list, select the width
- From the **Art** drop-down list, select the required option (if required)
- Click **OK**.



These are examples of formatting; others apply and will vary according to the software application and its functionality. Each formatting command will follow one or more steps to complete. When this is performed, the results of formatting will need to be checked for accuracy.

2.5 – Use relevant help functions to overcome simple issues

By the end of this chapter, the learner should be able to:

- Identify help functions
- Use help functions to overcome common user issues.

Overcome issues using the help functions

When working in applications, you may experience user issues that need to be resolved. For example, you may not know how to perform a software command or when you do, this may not work as intended. Many applications will have a help function included; they are designed to answer basic software queries.

The questions that you ask and the terms that you use must be clear and direct, so the software can respond with accuracy.

Help functions can be connected to an online help facility that allows you to search more broadly for terms and answers to your questions about the software application. Alternatively, the application may have an internal library of information that you can search through to find information.

For example, help functions may be found in the following ways:

- By pressing the **F1** key on a keyboard (if programmed or applicable to the software/device)
- A question mark in the software menu (this symbol is used in some applications)
- Under **Help** (you may find that an application has a **Help** menu item that you can access)
- As a search field with a magnifying glass symbol next to it (this will bring up information about a search query).

This facility is designed to answer common user issues; it allows you to overcome simple problems yourself rather than asking others unnecessarily. When these fail to resolve the issue, you should speak with your IT department or person to obtain further help.

Using a help function

When you locate your help function, you will need to type in a basic question or term, or search through the information sections that are provided. It will depend on the device and software as to what you may need to do; this is something that you can check yourself or ask your manager/IT person.

For example, in Microsoft Word, you may want to know how to insert a picture; to do this, you might type ‘insert a picture’. If you have a problem with performing a function, such as deleting a section break in a document, you might want to ask ‘how do I remove a section break?’

Therefore, taking the first example, you can:

- Press **F1** on your keyboard
- Access the menu that appears on the right side of the screen
- Type in **insert a picture** in the search bar
- Check the response that appears below this
- Follow the procedure listed to insert a picture.

You should use key words in your searches to ensure the software can identify the topic in question.

You may also have device and software instructions and manuals with a 'frequently asked questions' section or a list of common problems and how to resolve them. Other user guides may also give you more information about the product that you were not aware of; this can also help you to solve some minor problems. When you have access to these, it may be worthwhile taking a few minutes to look through them for the information that you need; although, if a quick search does not prove successful, you should seek help from the appropriate person instead.

Chapter 3: Finalise and store document

3.1 – Review and edit final information or data, and prepare for storage in accordance with organisational and task requirements

By the end of this chapter, the learner should be able to:

- Review information or data for any errors
- Edit and update information and data as needed.

Reviewing and editing final information or data

After you have completed your task, you should review this before moving on to your next task. This is your opportunity to double-check that the details are correct and the file looks as expected.

Reviewing information means:

- Checking that you have followed the task instructions correctly and that the information/data reflect this
- Making sure that the file looks as it should do and that nothing is missing or has unexpectedly changed
- Checking that spelling and grammar are correct
- Checking that data and any calculations are correct
- Checking that formatting is as it should be
- Making sure the file is in the correct file format.

You may have organisational checking procedures to follow for this process.

Often, it is only after a short break or when the task is complete that you can see this with clarity. Errors may happen and they can be easily rectified at this stage. If any have been found, you should amend them to be correct.

For example, you may need to:

- Correct a spelling
- Re-position text or graphics
- Update a figure or change a number format.

Your procedures may include having your work checked by another person. If so, any comments and amendments that have been specified to you should be assessed and made as needed. When editing and making changes, you will need to make another final check afterwards. This is to ensure that you have completed editing correctly.

Now the information or data is reviewed and edited. Next, it will be ready for storage in accordance with organisational and task requirements.

3.2 – Name and store document and exit application

By the end of this chapter, the learner should be able to:

- Save a document
- Exit the application.

Saving a document

When ready, you should name the document and save it. You need to save a document to preserve the information and/or data. If you need to name the document/file, you should follow your organisation's naming convention to make this identifiable and accessible to you and any others.

This may need to be saved and stored on your computer, to a shared work system/drive, to the server, or online, such as in cloud storage.

The first thing to consider is whether:

- You are saving over the existing file version
- You are creating a new file version
- Where this needs to be saved.

There will be information that needs to be kept historically, and you must be clear on whether the file replaces an existing one or is to sit alongside it.

Your organisation will have a system for handling digital information; they should determine locations for storing files and how they need to be filed.

Using an organisational file naming convention will include:

- A consistent process to name files and folders
- A way to identify the file, such as a department code
- A series of letters/numbers in an abbreviated format to make the file recognisable
- A specific order for naming files (for example, it may be a file code first, followed by a file name, and then the file date).

For example:

You are saving a company staff newsletter on your computer. This needs to be saved along with the previous newsletters that have been created.

It needs to be saved with the following naming details:

- A newsletter code *(in this example, this will be N1_Staff)*
- The date the newsletter was finished *(in this example, May 2021)*

- The initials of the person creating this *(in this example, it will be BH)*
- Therefore, the file name will be:
    - N1_Staff_May 2021_BH.

As you can see, some extra lines in between the different parts of the file name have been added to make this easier to read. A file name should also have fewer rather than too many characters as this will make it harder to find (if there are too many letters/characters the file name may not appear in full).

An organisation will have requirements for the storage of files/digital information. There are common characteristics to this.

File storage requirements will include:

- Categorising files for storage (for example, by work department or type)
- Placing files into specific folders/designated storage locations
- Determining access requirements (for example, whether files need to remain confidential or if they need to be used by others)
- Locating files/folders according to work systems
- Backing up files to prevent data loss (this is usually done automatically as part of the system set-up)
- Archiving files (to remove older files that are no longer needed from sight/access, but which still need to be kept).

When the file name has been determined and you know where the file needs to be stored, you can proceed to save this. If the file is already saved on your desktop/device, you may now need to move this to the correct storage location.

To save the document in Microsoft Word:

- With the document open, click the **File** tab
- Click **Save As**; the **Save As** screen will display. Alternatively, you can click the **Save** option to make the same message display, but this will only work on a file that has never been saved before. If a file has already been saved, selecting the second option will just save over what was there before. Care should be taken to not lose information in this way
- Click **Computer** and locate the position or folder that you want to save the file to
- In the **File name** box, enter the name of the file **N1_Staff_May 2021_BH**
- Click **Save**.

Once you name and save the document, you can simply press **Save** or **Ctrl + S** on the keyboard to save any further changes to the document.

When saving a document, you should make sure you click the correct file type.

You may also want to save the document in another format. For example, from a Word document to a PDF file. Care should be taken to select the correct file format in the **Save As** dialogue box.

You can then gain access to this in the future to make further updates or to use this for work purposes.

Exiting the application

Once the document is saved in the correct location, you can now close the document and exit the application.

To close the document:

- Click the **File** tab and then click **Close**
- Click the **Close** button (or cross) in the corner of the open file.

There may be other ways to close the file, and you should ensure that you know what these are. When the file is safely closed, you can now close the application if this has not already happened.

To exit the application (with the application open on screen):

- Click the **File** tab
- Click **Exit**.

There may be other options to close this too, and you should be fully aware of these and any specific protocols you need to follow.

For example, you may need to log out of an application that you use frequently rather than exiting this completely. Logging out provides a layer of protection for data; it prevents others from being able to view or access information when you are away from your computer/device.

Appendices

Ergonomics

Chair

A chair should provide good lumbar support at the bottom of your back. Sit as far back in it as possible, so your back is resting against the back of the chair. You may need to adjust the tilt to be either straight upright or slightly forward in order to ensure you are comfortable. Don't tilt it backward; this will lead to poor posture and more difficulty with using a keyboard. The chair back should ideally reach up to support the shoulder blades.

Adjust the height of the chair so that your feet rest flat on the floor. If this isn't possible, use a footrest. Your upper legs should be parallel to the floor, and there should be a gap between the back of your knees and the edge of the chair. If your chair has armrests, adjust them so you can rest your forearms on them. This should allow you to drop your shoulders. However, don't use them to slouch back in your chair; try to maintain upright at all times.

Desktop

Your desk should be about elbow height with everything within easy reach, so you do not have to twist unnecessarily. It is important you feel relaxed when seated at your desk; if you are uncomfortable or aching, you will need to change your position. Ideally, you should be able to see everything on your desk without turning your head, as continually having to turn your head could lead to pain in the neck.

When using a computer, your keyboard should be positioned, so your wrists are neutral, not bending up or down, and your forearms are parallel with the desk. Some people have a wrist rest to support them while they are typing. (Laptops place more strain on wrists than conventional keyboards as they are usually higher, so make the relevant compensations with your posture.) When using a mouse, you should reduce the pressure placed on your wrist by releasing the mouse as often as possible and keeping it close to the keyboard.

The monitor should be just over an arm's length away, with the top of it slightly below eye level. However, you may have to make compensations if you have problems with your sight and adjust it to wherever you can focus on it best. People with bifocal or multifocal lenses will need to find a position where they can see out of both lenses. If you have two monitors, ensure they are placed close together, so you don't have to turn your head when changing screens.

Consider how large the icons and text on the screen are. If it doesn't decrease your productivity, it may be advisable to enlarge them to avoid straining your eyes. This is particularly relevant when looking at typing for long periods of time.

Lighting

Poor lighting can cause damage and strain to the eyes. If possible, there should be natural light in your work environment. Light can also cause glare or reflection on a screen, which may damage your eyes and make it more difficult to work. To determine if there is glare on your screen, place a book above your eye level and see if the screen changes and becomes clearer. This is particularly prominent when working directly under a light. You should try to eliminate glare whenever possible.

Glare can be reduced by:

- Moving workstations to a better location
- Closing nearby curtains or blinds
- Purchasing an anti-glare surface to put over the screen
- Changing the contrast. White writing on a black background may be easier to see
- Tilting your screen forward, so less light falls on it
- Placing a folder or book overhanging the screen by around three inches
- Purchasing an LCD screen to eliminate glare.

If you experience discomfort when looking at a bright screen, try to reduce the brightness or change the contrast again. Take short breaks to look away from the computer every ten minutes. Even if you don't suffer from discomfort, short visual breaks every hour or so can still help you reduce strain on your eyes.

Noise

Excessive noise can cause hearing damage and poor work productivity. If noise interferes with your concentration or you struggle to hear speech, talk to your manager/supervisor to rectify the situation. In noisy environments, it may not be possible to eliminate this, but it may be possible to obtain ear protection (personal protective equipment).

Movement

When you are seated, try to keep moving so you aren't stationary for too long in order to avoid tight muscles in your back and legs. Constantly changing posture is known as dynamic sitting. Good ergonomic chairs are designed to facilitate this and allow movement.

If you have control over your working times, try to take several shorter breaks rather than one long break. This will reduce fatigue and keep your muscles in better condition. Talk to your supervisor to see if this would be possible in your workplace.

Reducing repetitive movement

You should try and reduce the time spent doing the same movements by rotating tasks and taking breaks when it is possible. Try to incorporate 'micro pauses' into your work routine to reduce tension. For example, when waiting for a document to load, relax your hands into your lap momentarily instead of leaving them on the keyboard and mouse. These pauses give your muscles time to relax without lowering your work productivity.

Phone calls

If you have to make long phone calls in your role, avoid holding the phone between your shoulder and ear. Always use a hand to hold it; if you need to write or type while on the phone, use a headset or speakerphone instead to leave your hands free.

References

These suggested references are for further reading and do not necessarily represent the contents of this unit.

Websites

Comcare (Australian Government) 'Ergonomic hazards': https://www.comcare.gov.au/safe-healthy-work/prevent-harm/ergonomic-hazards

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Power Home Biz '8 Types of Communication Technologies Taking Businesses to the Next Level': https://www.powerhomebiz.com/managing-and-growing/technology/8-types-communication-technologies-taking-businesses-next-level.htm

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