

# BSBWRT301 Write Simple Documents - Resource



**BSB30115 Certificate  
III in Business**



---

# TABLE OF CONTENTS

---

<b>TABLE OF CONTENTS.....</b>	<b>2</b>
<b>COURSE INTRODUCTION.....</b>	<b>3</b>
ABOUT THIS GUIDE .....	3
ABOUT ASSESSMENT .....	3
<b>ELEMENTS AND PERFORMANCE CRITERIA .....</b>	<b>5</b>
<b>REQUIRED SKILLS AND KNOWLEDGE.....</b>	<b>6</b>
REQUIRED KNOWLEDGE .....	6
REQUIRED SKILLS .....	6
<b>EVIDENCE GUIDE.....</b>	<b>7</b>
<b>PRE-REQUISITES.....</b>	<b>8</b>
<b>TOPIC 1 – PLAN DOCUMENT .....</b>	<b>9</b>
<b>DETERMINE AUDIENCE AND PURPOSE FOR THE DOCUMENT .....</b>	<b>9</b>
<b>DETERMINE FORMAT AND STRUCTURE .....</b>	<b>11</b>
<b>ESTABLISH KEY POINTS FOR INCLUSION AND IDENTIFY ORGANISATIONAL REQUIREMENTS .....</b>	<b>12</b>
<b>ESTABLISH METHOD AND MEANS OF COMMUNICATION .....</b>	<b>15</b>
<b>TOPIC 2 - DRAFT DOCUMENT .....</b>	<b>18</b>
<b>DEVELOP DRAFT DOCUMENT TO COMMUNICATE KEY POINTS.....</b>	<b>18</b>
<b>OBTAIN AND INCLUDE ANY REQUIRED ADDITIONAL INFORMATION .....</b>	<b>21</b>
<b>TOPIC 3 - REVIEW DOCUMENT.....</b>	<b>23</b>
<b>CHECK DRAFT FOR SUITABILITY OF TONE FOR AUDIENCE, PURPOSE, FORMAT AND COMMUNICATION STYLE .....</b>	<b>23</b>
<b>CHECK DRAFT FOR READABILITY, GRAMMAR, SPELLING, AND SENTENCE AND PARAGRAPH CONSTRUCTION .....</b>	<b>25</b>
<b>CHECK DRAFT FOR SEQUENCING AND STRUCTURE AND TO ENSURE IT MEETS ORGANISATIONAL REQUIREMENTS.....</b>	<b>27</b>
<b>ENSURE DRAFT IS PROOFREAD, WHERE APPROPRIATE, BY SUPERVISOR OR COLLEAGUE.....</b>	<b>29</b>
<b>TOPIC 4 - WRITE FINAL DOCUMENT .....</b>	<b>31</b>
<b>MAKE AND PROOFREAD NECESSARY CHANGES AND ENSURE DOCUMENT IS SENT TO INTENDED RECIPIENT</b>	<b>31</b>
<b>FILE COPY OF DOCUMENT IN ACCORDANCE WITH ORGANISATIONAL POLICIES AND PROCEDURES .....</b>	<b>33</b>
<b>SUMMARY .....</b>	<b>36</b>
<b>REFERENCES.....</b>	<b>37</b>

---

# COURSE INTRODUCTION

---

---

## ABOUT THIS GUIDE

---

This learner guide covers one unit of competency that is part of the BSB30115 Certificate III in Business Training Package:

BSBWRT301A Write simple documents

This unit describes the performance outcomes, skills and knowledge required to plan, draft and review a basic document before writing the final version.

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

This unit applies to individuals who are skilled operators and apply a broad range of competencies in various work contexts. They may exercise discretion and judgement to produce a range of basic workplace documentation.

---

## ABOUT ASSESSMENT

---

This guide contains a range of learning activities which support you in developing your competence. To apply this knowledge to your assessment you will be required to complete the assessment tools that are included in your program. The assessment is a competency based assessment, which has no pass or fail; you are either competent or not yet competent. This means that you still are in the process of understanding and acquiring the skills and knowledge required to be marked competent.

For valid and reliable assessment of this unit, a range of assessment methods will be used to assess practical skills and knowledge.

Your assessment may be conducted through a combination of the following methods:

- Third-party reports from a supervisor
- Practical demonstration of your skills in a classroom situation
- Projects and assignments
- Portfolio of evidence
- Written or verbal questioning to assess knowledge and understanding of business policies and procedures.
- Oral presentation
- A combination of these methods

The assessment tool for this unit should be completed within the specified time period following the delivery of the unit. If you feel you are not yet ready for assessment, discuss this with your trainer.

To be successful in this unit you will need to be able to join you're learning to your work place, this should be achievable for those who are employed and for those who are not yet employed and you will be required to use observations of examples that can take place in a workplace environment.

---

# ELEMENTS AND PERFORMANCE CRITERIA

---

- |    |                      |                                                                                                                                                                                                                                                                                                                                                                                                     |
|----|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Plan document        | 1.1. Determine audience and purpose for the document<br>1.2. Determine format and structure<br>1.3. Establish key points for inclusion<br>1.4. Identify organisational requirements<br>1.5. Establish method of communication<br>1.6. Establish means of communication                                                                                                                              |
| 2. | Draft document       | 2.1. Develop draft document to communicate key points<br>2.2. Obtain and include any required additional information                                                                                                                                                                                                                                                                                |
| 3. | Review document      | 3.1. Check draft for suitability of tone for audience, purpose, format and communication style<br>3.2. Check draft for readability, grammar, spelling, and sentence and paragraph construction<br>3.3. Check draft for sequencing and structure<br>3.4. Check draft to ensure it meets organisational requirements<br>3.5. Ensure draft is proofread, where appropriate, by supervisor or colleague |
| 4. | Write final document | 4.1. Make and proofread necessary changes<br>4.2. Ensure document is sent to intended recipient<br>4.3. File copy of document in accordance with organisational policies and procedures                                                                                                                                                                                                             |

---

# REQUIRED SKILLS AND KNOWLEDGE

---

This describes the essential knowledge and skills and their level required for this unit.

---

## REQUIRED KNOWLEDGE

---

- Basic grammar, spelling and punctuation.
- Communication protocols
- How audience, purpose and method of communication influence tone
- Organisational policies and procedures for document production
- Resources to assist in document production, such as dictionary, thesaurus, templates, style sheets

---

## REQUIRED SKILLS

---

- Literacy skills to read and understand a variety of texts; to prepare general information and papers according to target audience; and to proofread and edit documents to ensure clarity of meaning and conformity to organisational requirements
- Problem-solving skills to determine document design and production processes

---

# EVIDENCE GUIDE

---

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required knowledge and skills, the range statement and the assessment guidelines for this Training Package.

## **Critical aspects for assessment and evidence required to demonstrate competency in this unit**

Evidence of the following is essential:

- Producing a range of documents that accurately convey required basic information
- Using formatting suitable for intended audience
- Knowledge of organisational policies and procedures for document production

## **Context of and specific resources for assessment**

Assessment must ensure:

- Access to office equipment and resources
- Examples of documents

## **Method of assessment**

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

- Direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate
- Review of draft documents
- Analysis of responses to case studies and scenarios
- Demonstration of techniques
- Oral or written questioning to assess knowledge of communication protocols
- Review of final documents

## **Guidance information for assessment**

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

- BSBITU303A Design and produce text documents
- Other general administration units

---

# PRE-REQUISITES

---

This unit must be assessed after the following pre-requisite unit:

There are no pre-requisites for this unit.

---

# TOPIC 1 – PLAN DOCUMENT

---

## DETERMINE AUDIENCE AND PURPOSE FOR THE DOCUMENT

---

You have to grab your reader's attention if you want to get your ideas across. No one has time in the workplace to read long-winded, poorly spelt documents. When preparing a document for others to read it is important to hold someone's attention so you need to understand who they are and what they want to know. Put yourself in their shoes and it will give you a new perspective.

Tell your reader why the material is important to them. Say, "If you want to order extra of that product, here's what you have to do." Or, "If you want to receive an order outside your regular delivery cycle here's what you should know." Or, "If you are planning to apply for safety training, read this first."

Identifying your reader will do more than ensure that you write clearly. It will also help you focus on their needs. Start out by thinking about what your reader knows about the situation now. Then, think about how to guide them from their current knowledge to what you need them to know. To help you do this, try answering the following questions:

- Who am I writing to?
- What do they already know about the subject?
- What do they need to know?
- What questions will my reader have?
- Do they understand my industry jargon?
- Am I setting out my information clearly and in a logical order?
- Is my information accurate?
- Have I proof-read the document or had someone else do that for me?
- What's the best outcome for my organisation?
- What do I need to say to get this outcome?
- What's the best outcome for my reader?
- What do I need to say to get this outcome?

Consider the style of writing which already exists in your workplace. Some organisations are very casual and accept emails, texts and even chat software to communicate between departments but may have strict guidelines about who is authorised to contact customers or clients.

There may be policies and procedures outlining the type of contact and how it is to be conducted. For example you may be allowed to call a customer to arrange a delivery time but text to that same number would be considered inappropriate.

The higher up the organisational chain of command you go the more formal the style of communication you need to use. Your writing style would be very different if you were writing to the CEO compared to a peer or supervisor.

Fortunately in most workplaces the mystery of how to prepare documents has been resolved as there will be existing examples of various forms and emails received will guide you in how to approach various levels of work colleagues. There should also be an area on the staff server where templates are kept for producing electronic forms and letters which you will simply have to fill in the details.

It is important to spell correctly and be able to use the correct grammar and punctuation in your document in order to avoid putting yourself at a disadvantage by appearing careless in your writing style. There can also be a perception that those who cannot spell or who cannot be bothered using spell check whilst composing a document have lesser abilities in the workplace than might actually be the case. Most software has spelling and grammar checking options and it makes sense to use them to help you present in the most professional way you can. A small effort in this area can avoid a false perception about you – lazy, uneducated, or sloppy – becoming a true reflection of your working style.

### Self-Test 1.1

Identifying your reader will do more than ensure that you write clearly. It will also help you focus on their needs.

- True
- False

### Self-Test 1.2

Fill the gaps with words from the list below:

**Correctly, punctuation, grammar**

It is important to spell \_\_\_\_\_ and be able to use the correct \_\_\_\_\_ and \_\_\_\_\_ in your document.

## DETERMINE FORMAT AND STRUCTURE

---

Although it is unlikely, if you need to use a certain type of document in the workplace and no such form exists, you may need to create one using a template. Before you let your creative side run free, it is important to check with your supervisor or department administrator if there is a template you can use.

Templates are used by organisations to ensure all their documents look similar, use the approved colours and logos and conform to any auditing or quality control requirements. They provide a basic outline of a form or letter and you fill in the rest as required. Unless you are working for a new company who may not have all the documentation it requires yet, the chances of you having to create a document from scratch are slim.

Even emails in the workplace have a company signature which will appear automatically when you open a new email. It should state your name, position, and provide contact details such as your mobile, office number, webpage, physical location and postal address. If you are not familiar with writing emails in the workplace, seek guidance from your supervisor or mentor if you have not been given any instructions during your orientation.

The appearance of the document will change depending on what it is used for. Workplace policies and procedures will be contained as a hard copy in a folder and may also be available on the company website in a section known as the intranet and will require you to log on using a password or perhaps your staff number to access these forms.

Other documents such as invoices, order forms and timesheets will have spaces for you to fill details in and may be paper-based. Some organisations use order books which have carbonated paper which produces several copies – one for you, one for the office and one for your supplier or customer. Computer generated forms are becoming commonplace and you may simply need to move down the page filling in information as you go.

### Self-Test 1.3

If your workplace has a set template for the document you are writing you should...

- A. Write the document the way you want
- B. Use the template provided
- C. Use another company's format

## Self-Test 1.4

Fill the gaps with words from the list below:

Organisations, similar, colours, logos

Templates are used by \_\_\_\_\_ to ensure all their documents look \_\_\_\_\_, use the approved \_\_\_\_\_ and \_\_\_\_\_ and conform to any auditing or quality control requirements.

## ESTABLISH KEY POINTS FOR INCLUSION AND IDENTIFY ORGANISATIONAL REQUIREMENTS

When you are creating a document for an organisation you will need to ensure that you follow all of the requirements that they may have in place. These requirements may include:

- Company colour scheme
- Company logo
- Consistent corporate image
- Content restrictions
- Established guidelines and procedures for document production
- House styles
- Observing copyright legislation
- Organisation name, time, date, document title, filename etc. In header/footer
- Templates

You will be able to find all of the organisational requirements within the organisational policies and procedures manual for your workplace. If you are unsure of the location of the organisational policies and procedures manual then you will need to talk to your manager or supervisor about the location of the manual. Your manager or supervisor will also be able to help you with any questions you have about the layout and design of your documents.



Some forms will be pre-printed for you such as timesheets or timecards to use in time clocks as you enter and leave the premises. They will be custom printed to suit your organisation or come from a supplier who will ensure the card will fit the time clock.

The information on the card will depend on organisational requirements. Sometimes breaks will need to be recorded as well. This information is used to calculate your wage so it is important that you don't forget to clock on or off as directed.

Other organisations will have a book where you sign in and out. Again, it is important for you as well as the payroll department that you write clearly and legibly and are accurate in recording times and dates. It may make the difference between your being paid overtime and/or penalty rates or not.

It is important to know what to include in documents. What might not seem important to you might mean the document is not dealt with properly where it is sent to. Most forms for example will require details of the sender as well as the receiver.

In the workplace it is crucial to remember that filling out the personal details section by simply writing “John” is not sufficient as there may be more than one person with your name where the form is heading and it could make it difficult for the receiver to contact you if there is more than one person in your organisation with the same name as you. Remember to include your first and last name as well as at least one method of contacting you – mobile, pager number, office number, work email address or postal address.

Some of these details along with a space to write in may be pre-printed on the form to help you. It is never appropriate to use your own email address to deal with colleagues or customers. Try to put yourself in the receiver’s shoes. They need to know who sent them this paperwork and be able to contact you if they have any queries. If you provide your personal email they may not know where you are from. It also provides them with the ability to contact you out of hours. Whilst you may not be too bothered about this initially, after a while being contacted on Sunday morning at 9am will become bothersome.

The other reason for not providing personal emails to customers is that all workplace communications are owned by the organisation. This means they are not your property and should not be held in your inbox.

### Self-Test 1.5

You have been asked to complete the personal details section of a form in your workplace. The customer's name is John Benson. What would you need to write in the name section?

- John B
- John
- J.B.
- John Benson

### Self-Test 1.6

Fill the gaps with words from the list below:

Office, postal, email, first, last, mobile

Remember to include your \_\_\_\_\_ and \_\_\_\_\_ name as well as at least one method of contacting you – \_\_\_\_\_, pager number, \_\_\_\_\_ number, work \_\_\_\_\_ address or \_\_\_\_\_ address.

## Self-Test 1.7

Why should you refrain from using your personal email address when dealing with customers?  
You can choose more than one answer.

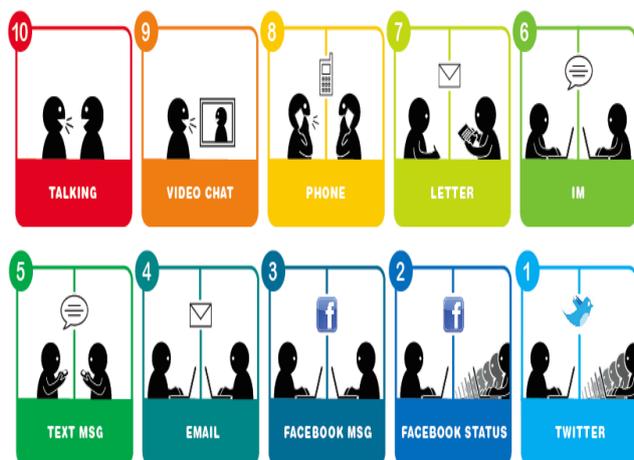
- Because you should not provide personal details to customers
- Because your personal life can be interrupted at any time of the day
- Because work related emails are the property of the organisation
- None of the above

## ESTABLISH METHOD AND MEANS OF COMMUNICATION

The best communication methods succeed in putting across the right message in a clear, unambiguous way that gets noticed by the target audience, whilst also saving on time and cost. Good communicators succeed in choosing the best medium of communication for the particular purpose in mind. For external communications, the Australian Tax Office typically uses:

- Written communications dispatched by mail e.g. statements detailing tax liabilities and payment schedules. Paper-based items sent by mail have the advantage of providing a clear, fileable statement that is likely to reach its intended recipient.
- Oral communications: customers can 'phone in' with their queries. They can also speak directly to the employee who is managing their account. Oral communication allows most misunderstandings to be resolved immediately.
- Face-to-face communications e.g. a visit to the local office by arrangement. This can save time and subsequent communications.
- Online communications. Today consumers can complete their Tax Return, claim tax credits and do a variety of other business with the Inland Revenue directly online, thereby saving a great deal of time. An important advantage of this method is that ongoing 'help' is provided by pop-up help facilities. This is a cheap, quick and efficient means of communication.
- Advertising on TV and in the press e.g. to alert people to tax payment deadlines or to eligibility for tax credits. By this method the Inland Revenue is able to communicate with millions of customers cost effectively.

### 10 LEVELS OF INTIMACY IN TODAY'S COMMUNICATION



## PRINCIPLES OF COMMUNICATION

Communication is a two-way process of giving and receiving information through any number of channels. Whether one is speaking informally to a colleague, addressing a conference or meeting, writing a newsletter article or formal report, the following basic principles apply:

- Know your audience
- Know your purpose
- Know your topic
- Anticipate objections
- Present a rounded picture
- Achieve credibility with your audience
- Follow through on what you say
- Communicate a little at a time
- Present information in several ways
- Develop a practical, useful way to get feedback
- Use multiple communication techniques

Communication is complex. When listening to or reading someone else's message, we often filter what's being said through a screen of our own opinions. One of the major barriers to communication is our own ideas and opinions.

There's an old communications game, telegraph, that's played in a circle. A message is whispered around from person to person. What the exercise usually proves is how profoundly the message changes as it passes through the distortion of each person's inner "filter."

When writing your document you need to be competent in use of software packages such as Word, Excel, PageMaker, and PowerPoint. If your skills are weak here, your document will be poorly presented.

Master the skills appropriate to the level of your document such as:

- How to select fonts
- How to make a contents page
- How to use bullets and numbering

Means of communication may include:

- Software packages such as MS Word, MS Excel, MS PageMaker, MS PowerPoint and templates

### Self-Test 1.8

The best communication methods succeed in putting across the right message in a clear, unambiguous way that gets noticed by the target audience.

- True
- False

### Self-Test 1.9

Fill the gaps with words from the list below:

Receiving, giving, two

Communication is a \_\_\_\_\_-way process of \_\_\_\_\_ and \_\_\_\_\_ information through any number of channels.

### Self-Test 1.10

When writing a newsletter article or formal report you must ensure that you:

- A. Know your audience
- B. Know your purpose
- C. Know your topic
- D. All of the above

---

## TOPIC 2 - DRAFT DOCUMENT

---

### DEVELOP DRAFT DOCUMENT TO COMMUNICATE KEY POINTS

---

Text may be drafted in a document and the document may then go through a number of revisions before it is finished. Even the simplest of documents generally go through a process of drafting, checking and finalising. For example, a letter may be written, read through and then changes made or content confirmed, before it is posted. With a complex document, it can go through many processes of amendment and correction before it is finished. It would be read and then corrected by the author as a first step, and this may be done a number of times.

It may then be sent onto a second level of checking and further changes may be suggested. Once these changes are completed, it may then be sent to a third or fourth level of checking depending on the document's complexity and the areas that need to be checked before it is complete. With some documents it is not just the way the content is written that is checked but also the technical accuracy, the layout of the document and the way it is presented.

As mentioned previously, genre is the style of writing used in a document. You are creating a number of different documents in this unit and each of these documents will be set out in a way that reflects their own genre. For example, minutes may differ in their formatting but they are always set out in a particular order with certain headings, such as Apologies, always being present. In the same way, a software manual has a similar style to other software manuals with steps and graphics to show how a particular process is carried out.

Depending on your role in the workplace you may need to complete reports which require input from you and some thought needs to be given to the content. It is a business document and so the use of personal remarks, current socially acceptable jargon, acronyms (unless commonly used within your organisation) and an informal tone should all be avoided.

If you have not completed a business report before or emailed a supervisor or manager you will need to check previous reports or emails to understand the tone and level of formality required by your recipients.

Businesses rely on efficient and effective written communication and email is the most common way to communicate in the workplace. However, it can be difficult to write clear, effective emails when there is too little time and too many to read and respond to. It is easy to approach workplace communication in the same way as you do with personal correspondence. This is the most common area for misunderstandings and frustrations to occur. A lot of time is lost in trying to work out what is really meant so you need to intentionally practice more formal, businesslike writing skills in order to be understood and to make sure your reports have clarity and accuracy.

Documents which require more input from you include reports such as:

- Accident and Incident reports – these can be internal or required by your organisation’s insurance company, WorkSafe or any emergency services involved in the event.
- Monthly reports discussing sales, stock movement, staff changes, departmental challenges and achievements
- Minutes from WHS meetings or departmental/project meetings

These are documents which will need to be prepared by you but checked for clarity and accuracy by various other colleagues such as the Safety Rep, your supervisor or manager or the chair of any sub-committee or group for which you provide minutes to. It is important to remember, before you start writing that writing has no body language, no tone of voice and no facial expressions.

The only way you have to convey what you mean are words. In a conversation you can deduce the real meaning by watching how the other person stands, sounds and looks as they speak to you. In business communication it is vital that you learn to draft documents that are received in a positive and informative light. This gives a good impression to other workmates, supervisors and customers and ultimately makes your working life easier as people understand clearly what you have to say and are not offended by the way you say it.

Let’s consider tone in writing. When you write what might seem to be a simple sentence it can be taken in more than one way. For example, if you sent the following email to a colleague:

- E-mail received: I heard you said at the meeting that I was rude to you!
- Response: I never said you were rude to me.

Consider the response and the meaning and implication of each statement when the emphasis changes on only one word.

- I never said you were rude to me. (someone else did...)
- I **never** said you were rude to me. (a third party may have though...)
- I never **said** you were rude to me. (rudeness was implied but not stated...)
- I never said **you** were rude to me. (someone else was...)
- I never said you were **rude** to me. (offence was caused, but not by your rudeness...)
- I never said you were rude to **me**. (implies you were rude to someone else...)

Without the opportunity to see and hear the speaker, you have no ability to judge accurately the tone, and intention of what was said. This is just a small example of the importance when drafting business communications of being clear and concise, and not using personal remarks and casual attitudes. Try to visualize the person reading and reacting to your writing.

Hopefully you can see that reading existing business reports and correspondence will help guide you in your organisation's conventions, grammar, style and the kind of vocabulary used to convey information.

You may not have used a computer often before or haven't used one for drafting documents. You may even require some basic training in using Word or Excel in order to feel confident in the workplace. Word has a facility to spell-check as well as grammar-check your document and it would be wise to use it. Some machines are set up to use that function automatically and it can assist you if spelling, punctuation and grammar are not your strong points.

Consider these functions to be tools of trade in your workplace and use them to avoid embarrassing yourself. Using your knowledge of the way any documents are written in your business, combined with the information you are putting into yours and using tools such as spell-check will turn your draft into a final version that you will be proud to put your name to and send off to the receiver.

As you progress through your organisation you may become responsible for producing or at least contributing to the following high-level documents:

- Safety procedures
- Workplace policies
- Standard Operating Procedures
- Business plans

### Self-Test 2.1

Fill the gaps with words from the list below:

Effective, efficient, written

Businesses rely on \_\_\_\_\_ and \_\_\_\_\_ \_\_\_\_\_ communication and email is the most common way to communicate in the workplace.

### Self-Test 2.2

If you have not completed a business report before (or emailed a supervisor or manager), you will need to check previous reports or emails to understand the tone and level of formality required by your recipients. Why should you need to do this?

- So you ensure the way you write to them is acceptable to the organisation and aimed at the correct level of understanding
- So that information in the document is correct
- So that the spelling and grammar are correct
- All of the above

## OBTAIN AND INCLUDE ANY REQUIRED ADDITIONAL INFORMATION

---

There are a number of issues to consider regarding adding or changing information in a document. One is whether the author agrees with the changes suggested and therefore will incorporate them. A second issue is that if they are agreed, how the amendments are to be incorporated into the document.

A third consideration is how to show the reviewer what changes have been made to the document. It should not be necessary for the reviewer either to simply accept that changes have been done as requested or to have to check the original document with the one presented as amended.

With the use of Word's option to track changes, it is easy to see that all comments have been reviewed and how and what changes have been incorporated into the document. You have already looked at putting comments into your document. Now you will see how you can track any changes made to your document and then accept or reject those changes. The changes that are tracked in your document have the user name recorded against them.

### **Self-Test 2.3**

One of the reasons for adding or changing information in a document is:

- A. The author wants the changes made
- B. You don't like the way it has been written
- C. Your work colleagues say you should change it
- D. None of the above

---

## TOPIC 3 - REVIEW DOCUMENT

---

### CHECK DRAFT FOR SUITABILITY OF TONE FOR AUDIENCE, PURPOSE, FORMAT AND COMMUNICATION STYLE

---

Once documents have been drafted, they need to be reviewed to ensure that the objectives and requirements of the document have been achieved. It is possible when creating a document for a writer to become more interested in a particular area of a document, and in doing so neglect other areas. This can cause the document to become unbalanced and not achieve its original objectives. Alternatively, it is possible that a particular objective was missed or misunderstood at the first reading of the requirement specification.

Once a document has been drafted, it should be read and compared to the original objectives. In the case of your manual and report, it is important that the right information is included, and any superfluous information, no matter how interesting it may seem, is removed from the document. Your advertisement has to present information in a very brief format and has to be accurate and concise.

The minutes have to convey the information originally intended by the author of the notes. When expanding notes into full sentences and paragraphs, it is always possible to lose the original intention of the author. If the original notes had been handwritten, as is often the case with minutes, there is also the possibility of a particular word or phrase being unclear and then being misread or misinterpreted.

In the process of reviewing a document, information that is missing may be noticed or there may be information that requires further clarification. For example, there is a member's name missing from the committees. You need to check whether this person is a current member of the committee and if so, whether or not they attended the meeting.

When documents are sent to a reviewer electronically, it is possible to put notes into them that will not be seen if the document is printed. The reviewer may also put suggested changes into the document that the author can then accept or reject. All these and other functions are available in Word through the use of the markup function.

You will now electronically comment on the minutes using Word's markup function. The minutes would then be electronically sent to the original author's notes via email or a

shared directory. The author could then check that you have interpreted their content correctly.

**When using markup, your document can be viewed in a number of different formats:**

- **Original** - this is a view of your document prior to the changes being made.
- **Original Showing Markup** - this view shows your original document with the changes displayed.
- **Final** - this is a view of your document incorporating all the changes.
- **Final Showing Markup** - this is a final view of your document but with the changes displayed.

When entering your comments you will use the Original Showing Markup format, which will display your comments. If Track Changes was selected, then any changes in your document would also be displayed. You will use Track Changes later in this chapter.

The comments that you will put into your document in this next activity are intended for the author of the draft minutes. When you enter comments or record changes in a document, the reviewer's name or initials are also recorded. This information comes from the User specified within Word. The first step when entering electronic comments is to check that the name and initials are correct so that ongoing reviewers know who has made the comments. This is particularly important when a number of reviewers make comments in the same document

**Self-Test 3.1**

Once documents have been drafted, they need to be reviewed to ensure that the objectives and requirements of the document have been achieved.

- True
- False

**Self-Test 3.2**

Fill the gaps with words from the list below:

Right, superfluous, read, removed, compared

Once a document has been drafted, it should be \_\_\_\_\_ and \_\_\_\_\_ to the original objectives. In the case of your manual and report, it is important that the \_\_\_\_\_ information is included, and any \_\_\_\_\_ information, no matter how interesting it may seem, is \_\_\_\_\_ from the document.

## CHECK DRAFT FOR READABILITY, GRAMMAR, SPELLING, AND SENTENCE AND PARAGRAPH CONSTRUCTION

---

With any business documents that you produce, it is necessary to ensure that the grammar, spelling and punctuation are accurate. Word 2013 can help when checking these issues in your document, and you will go into this later in this section. However, it is important to manually read through your documents very carefully and also where possible get someone else to read through them too. It is very easy to miss simple errors that you yourself have made.

For example, the sentence 'Move to the second green underling' should read 'Move to the second green underlining'. In this case, the sentence makes approximate sense and so Word will not pick up the error. You may read such a sentence several times and simply read the words as you expect them to be, not as they actually are. Missing your own typographical errors is very common and it often requires someone else to read through your document to pick up the mistakes.

### LANGUAGE SETTING

As mentioned earlier, Word can help both with spelling and with grammar and punctuation. The first thing you must do of course is to make sure the language being used in your document is correct. Many words are spelled differently in the United States and if your language is set to English (United States) then some words will be spelled incorrectly for the English (Australia) language. As mentioned in Chapter 2, some functions in Word automatically change the language to English (United States) even though you may have the default language set as English (Australia). It is important, therefore, to make sure that the whole of your document is set to English (Australia) before using the spelling and grammar functions.

### PROOF READING

Check for accuracy – proofreading can save you and your organisation from embarrassment! A slip up in an important document can affect your career. The report must be proofread, by someone else if possible to correct any errors of spelling, grammar, or fact. A report without errors is a credible report!

### PROOFING OPTIONS

You have the facility within Word to set a number of different proofing options for your document. You will have noticed when keying in text that often Word will automatically change a word to the correct spelling. This is part of the settings in the AutoCorrect options.

## SPELLING

As mentioned before, the spell checker uses the dictionary of the language selected in the document. Any words in your documents that are underlined in red have been marked as having the incorrect spelling. You have three options when words are marked as being spelt incorrectly.

The first option is to right-click the word and check the alternative spellings given by Word. You can then click on one of these to replace your word with the correctly spelt word. The second is to add the word to the custom dictionary by right-clicking and selecting Add to dictionary from the shortcut menu. The third is simply to ignore the red underlining. You may do this if the word is the name of a town or business that is correct, but you do not wish to add it to your dictionary.

## GRAMMAR AND PUNCTUATION

When Word finds text that it considers to be suspect in respect of grammar or punctuation, the sentence or word is underlined in green. Grammar and punctuation go together; this is because it may be that the grammar is correct if the punctuation is fixed.

Sometimes Word may suggest that a whole sentence is changed around so that it reads in a better way. It is possible, however, that the suggestion given under the Grammar option is not correct.

For example. The Frankston report one of the statements is: 'The largest age group in Frankston is the 25-54 age group'. In this case, Word believes that because the wording is 25-54 that there are a number of age groups and suggests the word group be changed to groups. However, there is only one group and so the wording is correct. Microsoft Word also often indicates when the passive tense of words are used and this will become apparent when you read your minutes. The passive tense, however, may be the best option in a particular case. Remember that Word can only suggest changes, and it is up to you to check whether you should act on any suggestions given or ignore them.

### Self-Test 3.3

Fill the gaps with words from the list below:

**Punctuation, spelling, grammar**

With any business documents that you produce, it is necessary to ensure that the \_\_\_\_\_, \_\_\_\_\_ and \_\_\_\_\_ are accurate.

### Self-Test 3.4

When typing a document you should:

- A. Use the spell checker to check you document
- B. Check spelling and grammar yourself
- C. Get a colleague to check the spelling and grammar
- D. All of the above

## CHECK DRAFT FOR SEQUENCING AND STRUCTURE AND TO ENSURE IT MEETS ORGANISATIONAL REQUIREMENTS

---

All writing requires revision, and usually multiple revisions. To be thorough, go through three steps:

### Step One

Critically and objectively read the text, placing yourself in the reader's position. Ask the following questions:

- What am I trying to say?
- Have I said it?
- Is it clear to someone encountering the subject for the first time?

### Step Two

Simplify style and make the text more readable and effective. Ask yourself:

- Could I put it more succinctly?
- Is every word necessary?
- What can be deleted without loss of meaning or emphasis?
- Can I replace jargon with plain words?
- Will readers understand the technical vocabulary used?
- Could I use stronger, action verbs?
- Do the passives clarify my meaning or would an active form be better?
- Can I turn negative structures into positive ones?
- Can I shorten and/or vary sentence length?
- Are the leads sharp enough?

- Are there too many lists breaking up and complicating the text?
- Could a table or graph be useful?
- Can I reduce cross-references?

### Step Three

Do a final reading for spelling and typographical consistency.

NOTE: Microsoft Word™ grammar and spell check function can provide “readability” information. It tells you the average number of sentences per paragraph, the average number of words per sentence and the percentage of passive sentences. Although this tool will not ensure that you write any better than you already do, it can provide interesting information.

Nothing, however, is a better test than to submit your document for comment to someone outside your specific field of expertise.

It is very important that before you let your document be published or sent out, that you check the document to ensure that all the requirements are met including use of knowledge of enterprise style guide/house style.

### Self-Test 3.5

All writing requires revision, and usually multiple revisions

- True
- False

### Self-Test 3.6

When checking the draft you need to (select all correct answers):

- A. Ensure spelling is correct
- B. Critically and objectively read the text
- C. Skim over the text
- D. Assume the writer did a good job

### Self-Test 3.7

Fill the gaps with words from the list below:

Requirements, style, published, knowledge

It is very important that before you let your document be \_\_\_\_\_ or sent out, that you check the document to ensure that all the \_\_\_\_\_ are met including use of \_\_\_\_\_ of enterprise \_\_\_\_\_ guide/house style.

### ENSURE DRAFT IS PROOFREAD, WHERE APPROPRIATE, BY SUPERVISOR OR COLLEAGUE

---

It is important that the relevant personnel approve the documents you create. Sometimes it is necessary to get approval while the document is in an early draft form or when only part of a long document has been completed. Other times the document may be finished before it is read and approved; for example, a letter that has been written may only require a final proofing before it is sent out.

You have already put comments in three of your documents ready for them to be sent to the relevant personnel. Your manual would also need approval from the relevant staff member. This may be your supervisor or it may be someone in another department such as a training department. Staff in the training department would be able to point out not only whether the content is correct, but whether the document is set out in a format that will fit in with the other documents of this type produced by the organisation.

If your documents are received back with suggested amendments, it may be necessary to make the amendments and resubmit the document for approval a second time. If the document is a complex one then this process may be repeated a number of times before the document is finally approved.

Sometimes it is necessary to check the final document with an alternate staff member. For example, the minutes you have written would need to be checked and approved by the person chairing the meeting before they are sent out to other members. Therefore it is a good idea to ensure your draft text is approved by relevant enterprise personnel.

Relevant enterprise personnel may include:

- Colleagues/staff in own work section/ team members
- Consultative committees
- Internal providers of specialist expertise
- Managers/leaders/coordinators/supervisors
- Owners
- Staff in relevant work sections

### Self-Test 3.8

Fill the gaps with words from the list below:

**Resubmit, repeated, complex, amendments, second**

If your documents are received back with suggested \_\_\_\_\_, it may be necessary to make the amendments and \_\_\_\_\_ the document for approval a \_\_\_\_\_ time. If the document is a \_\_\_\_\_ one then this process may be \_\_\_\_\_ a number of times before the document is finally \_\_\_\_\_.

### Self-Test 3.9

Sometimes it is necessary to check the final document with an alternate staff member. Why?

- To make sure the document has the correct information in it
- To make sure the spelling and grammar are correct
- To make sure the formatting is correct
- All of the above

---

## TOPIC 4 - WRITE FINAL DOCUMENT

---

### MAKE AND PROOFREAD NECESSARY CHANGES AND ENSURE DOCUMENT IS SENT TO INTENDED RECIPIENT

---

You probably already use some of the strategies discussed below. Experiment with different tactics until you find a system that works well for you. The important thing is to make the review process systematic and focused so that you catch as many errors as possible in the least amount of time.

Don't rely entirely on spelling checkers. These can be useful tools but they are far from foolproof. Spell checkers have a limited dictionary, so some words that show up as misspelled may really just not be in their memory. In addition, spell checkers will not catch misspellings that form another valid word. For example, if you type "your" instead of "you're," "to" instead of "too," or "there" instead of "their," the spell checker won't catch the error.

Grammar checkers can be even more problematic. These programs work with a limited number of rules, so they can't identify every error and often make mistakes. They also fail to give thorough explanations to help you understand why a sentence should be revised. You may want to use a grammar checker to help you identify potential run-on sentences or too-frequent use of the passive voice, but you need to be able to evaluate the feedback it provides.

Proofread for only one kind of error at a time. If you try to identify and revise too many things at once, you risk losing focus, and your proofreading will be less effective. It's easier to catch grammar errors if you aren't checking punctuation and spelling at the same time. In addition, some of the techniques that work well for spotting one kind of mistake won't catch others.

Read slowly, and read every word. Try reading out loud, which forces you to say each word and also lets you hear how the words sound together. When you read silently or too quickly, you may skip over errors or make unconscious corrections.

Separate the text into individual sentences. This is another technique to help you to read every sentence carefully. Simply press the return key after every period so that every line begins a new sentence. Then read each sentence separately, looking for grammar, punctuation, or spelling errors. If you're working with a printed copy, try using an opaque object like a ruler or a piece of paper to isolate the line you're working on.

Circle every punctuation mark. This forces you to look at each one. As you circle, ask yourself if the punctuation is correct.

Read the paper backwards. This technique is helpful for checking spelling. Start with the last word on the last page and work your way back to the beginning, reading each word separately. Because content, punctuation, and grammar won't make any sense, your focus will be entirely on the spelling of each word. You can also read backwards sentence by sentence to check grammar; this will help you avoid becoming distracted by content issues.

Proofreading is a learning process. You're not just looking for errors that you recognise; you're also learning to recognise and correct new errors. This is where handbooks and dictionaries come in. Keep the ones you find helpful close at hand as you proofread.

Ignorance may be bliss, but it won't make you a better proof-reader. You'll often find things that don't seem quite right to you, but you may not be quite sure what's wrong either. A word looks like it might be misspelled, but the spell checker didn't catch it. You think you need a comma between two words, but you're not sure why. Should you use "that" instead of "which"? If you're not sure about something, look it up.

The proofreading process becomes more efficient as you develop and practice a systematic strategy. You'll learn to identify the specific areas of your own writing that need careful attention, and knowing that you have a sound method for finding errors will help you to focus more on developing your ideas while you are drafting the paper.

After you have finalised proofreading you need to ensure document is sent to intended recipient whether that be via email, mail or physically handing the document to the recipient.

### Self-Test 4.1

The spell checker is set to Australian English. In this case what spelling is correct?

- Behavior
- Behaviour
- Behaevur
- Behavure

### Self-Test 4.2

Fill the gaps with words from the list below:

**Focused, systematic, least, errors**

The important thing is to make the review process \_\_\_\_\_ and \_\_\_\_\_ so that you catch as many \_\_\_\_\_ as possible in the \_\_\_\_\_ amount of time.

### Self-Test 4.3

When proof reading you should:

- A. Proofread for only one kind of error at a time
- B. Read slowly, and read every word
- C. Circle every punctuation mark
- D. All of the above

## FILE COPY OF DOCUMENT IN ACCORDANCE WITH ORGANISATIONAL POLICIES AND PROCEDURES

---

Once you have finalised and printed a document you will need to ensure that it is saved and or stored in a way that will allow you or anyone interested to be able to access it. This may be so that you can reprint more copies or edit the document further or even to be used as a template for future documents.

When naming and storing a document you will need to adhere to you organisations policies and procedures regarding this. If you are unsure on how your organisation names and stores documents on the computer system you will need to seek assistance from you supervisor or manager.

Most workplaces have an electronic server that you save your work to so that all parties can access it if needed. For example if you have produced a flyer for a Wagon Wheel marketing campaign you will need to save the original file in the appropriate folder (Wagon Wheel Marketing), in case you need to print more out.

The file needs to also be named appropriately, you wouldn't name your Wagon Wheel flyer as document 10947389 if your company doesn't use a number system. You would name it something like Wagon Wheel flyer version 1, this makes it easier for anyone trying to find the file in the future.

Naming and storing documents may include:

- Appropriate file type
- Authorised access
- File names according to organisational procedure e.g. Numbers rather than names
- File names which are easily identifiable in relation to the content
- File/directory names which identify the operator, author, section, date etc.
- Filing locations
- Organisational policy for backing up files
- Organisational policy for filing hard copies of documents
- Security
- Storage in folders/sub-folders
- Storage on hard/floppy disk drives, CD-Rom, tape back-up

Ensure that whenever storing or naming a document you follow all work place procedures and or any instruction given to you by your supervisor or manager.

#### **Self-Test 4.4**

Once you have finalised and printed a document you will need to ensure that it is saved and or stored in a way that will allow you or anyone interested to be able to access it.

- True
- False

### Self-Test 4.5

When naming and storing a document you should (choose the one correct answer only):

- A. Adhere to workplace procedures
- B. Name the file whatever you want
- C. Use a title that will remind you of the content
- D. Store the file in a folder unrelated to it

---

## SUMMARY

---

Now that you have completed this unit, you should have the skills and knowledge required to plan, draft and review a basic document before writing the final version.

If you have any questions about this resource please ask your trainer. They will be only too happy to assist you when required.

---

# REFERENCES

---

<http://businesscasestudies.co.uk/hmrc/getting-the-message-across-the-importance-of-good-communications/methods-of-communication.html#ixzz35hWXpXw>