

*Secretarial Studies*

LEARNING GUIDE

960-714

IN COMPLIANCE  
WITH THE NEW  
*Program of  
Study*

## PRODUCING REPORTS

22

SOFAD





# HeadUp

## *Secretarial Studies*

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960-714

**IN COMPLIANCE**  
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*Study*

## **PRODUCING REPORTS**

22

**SOFAD**

## PRODUCING REPORTS

This learning guide was published by the SOFAD (Société de formation à distance des commissions scolaires du Québec).

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The role of secretary-receptionist is traditionally one that is filled by a woman. For this reason, feminine forms (she, her) have been used in the guide where appropriate. This choice was made in the interest of readability and is not intended to reflect any prejudice.

Legal deposit – 2019  
Bibliothèque et Archives nationales du Québec  
Library and Archives Canada  
ISBN: 978-2-89798-142-6 (print guide)  
ISBN: 978-2-89798-143-3 (PDF)

September 2019

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- The Table of Contents;  
- The Introduction;  
- A sample of pages.

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# INTRODUCTION

The competency *Producing Reports* is part of the program of study for a diploma of vocational studies (DVS) in Secretarial Studies. The program is divided into 25 competencies representing a total of 1485 hours of training.

Code	Number	Competency	Length (h)	Credits
960-501	01	The Occupation and the Training Process	15	1
960-515	02	Proofreading	75	5
960-526	03	Word Processing	90	6
960-534	04	Quality of Written English	60	4
960-544	05	Customer Service	60	4
960-554	06	Document Management	60	4
960-562	07	Producing Spreadsheets	30	2
960-572	08	Designing Presentations	30	2
960-584	09	Business Texts in English	60	4
960-596	10	Accounting Operations	90	6
960-605	11	Business Correspondence	75	5
960-613	12	Producing Databases	45	3
960-623	13	Handling Cash	45	3
960-635	14	Translation	75	5
960-644	15	Producing Tables and Charts	60	4
960-656	16	Visual Design of Documents	90	6
960-666	17	Business Texts in French	90	6
960-672	18	Digital Media	30	2
960-833	19	Interacting in French	45	3
960-695	20	Following Up on Business Correspondence	75	5
960-704	21	Meetings and Events	60	4
<b>960-714</b>	<b>22</b>	<b>Producing Reports</b>	<b>60</b>	<b>4</b>
960-722	23	Technical Support	30	2
960-733	24	Coordinating Multiple Tasks	45	3
960-746	25	Entering the Workforce	90	6

One credit corresponds to 15 hours of training.

# PRESENTATION OF THE LEARNING GUIDE

The specific competency *Producing Reports* is one of the 25 competencies covered in the Secretarial Studies vocational program. The educational aims of the program are to maintain and promote the quality of English, improve the quality of customer service, develop learners' desire to improve their knowledge of technological tools, and develop their sense of autonomy and initiative.

Secretaries today are trained to work independently yet play an integral role in any management team. They are indispensable assistants to managers and professionals, handling a variety of files and assuming multiple responsibilities. The competencies required to meet the needs of modern organizations are numerous and increasingly varied.

This guide will help you develop your competencies in producing reports. You will learn the general characteristics of a report, its components, the manner in which to lay out the text and the components, such as headers and footers, pagination, citations and notes, tables and charts, appendices and the bibliography, all in accordance with current standards. You will also learn how to modify, create, number and manage styles in the Word application. Moreover, you will work with Word functions that allow you to update tables quickly and efficiently. Instructions come with screen shots so that you can easily grasp the various steps to follow when using the Word application. In order to support everything you have learned, you will be asked to format two reports as part of the scored activities.

## WORK SITUATIONS

This learning guide consists of three work situations (WS) that will not only lead you to acquire new knowledge but teach you to apply it with ease and use it skillfully. Each situation follows the same structure. First, you read about the work context and the assignment you must carry out. Next, you embark on a series of engaging and motivating tasks. You will be guided step by step through each task. All of the answers to the exercises can be found in the answer key, at the end of the guide.

## EVALUATION OF LEARNING

This guide comes with two scored activities, that you can download from the [portailsofad.com](http://portailsofad.com) website. You will find all the information you need in your guide when you reach the appropriate stage for evaluation.

Scored activities must be submitted for correction and grading. You will hand them in to your teacher if you are taking the course in an education centre, or you will send them to your tutor if you are registered for distance learning. In either case, the corrected document will be returned to you.

Scored activities are an excellent way for you to identify areas of difficulty so that you can work to overcome them. The last scored activity in the guide was developed following the same criteria as those of the final evaluation for the course. It therefore serves as an effective practice test for the official final examination, which will take place under supervision in an adult education centre.



## REQUIRED MATERIALS

The materials for this course include the following:

- the learning guide and its answer key
- two scored activities
- access to the [portailsofad.com](http://portailsofad.com) website
- the *Report Layout Procedure and Style List* reference tool (available on the [portailsofad.com](http://portailsofad.com) website)
- documents relating to situations 1, 2 and 3 (available on the [portailsofad.com](http://portailsofad.com) website)

## RECOMMENDATIONS FOR SUCCESS

We recommend that you do all the exercises in the learning guide as well as the two scored activities provided. Carefully compare your answers with the answer key and, if necessary, review content to make sure you fully understand it before going on to the next task.

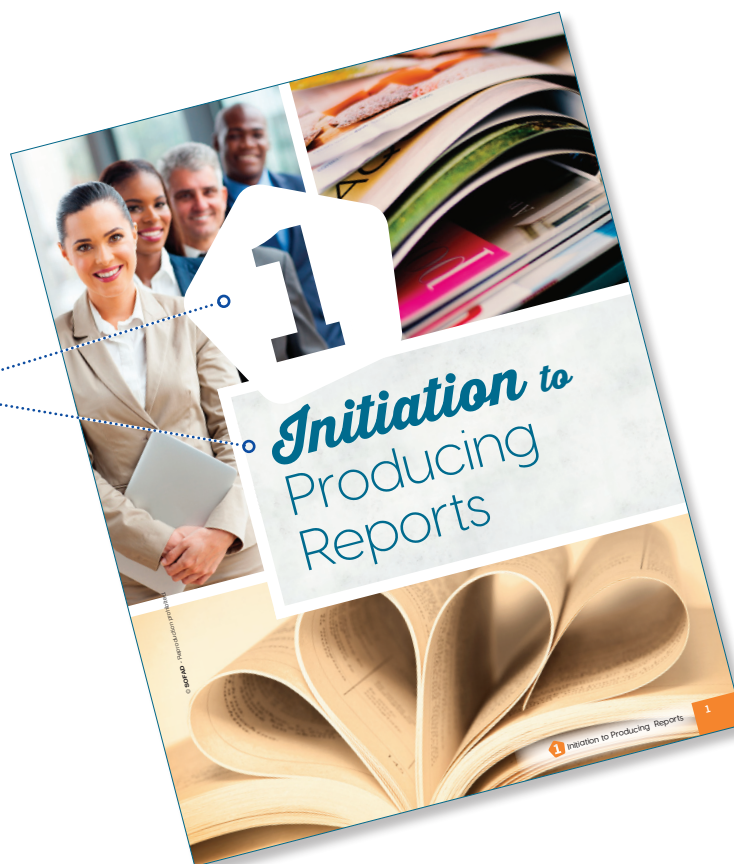
If you have questions, do not hesitate to ask your teacher or tutor for explanations.

The course is estimated to take approximately 60 hours to complete. Set up a study schedule that takes into account your needs as well as your obligations: family, work or other responsibilities. Follow the schedule you have set as closely as possible.

# OVERVIEW OF THE LEARNING GUIDE

## Opening Pages

The title page presents the number and title of the work situation.



The situation begins with a description of the context in which you will complete different tasks to acquire the target competency.

The **Your Assignment** section summarizes and lists the tasks you will perform during the work situation.

The total length of all the situation tasks includes the scored activity, if applicable.





# Situation Highlights

The task number is clearly indicated.

## TASK 1.1

### Distinguishing the General Characteristics of the Report

In order to transcribe and lay out the text of a report, you must understand the nature of the text and its characteristics. You are now taking a few minutes to go over the essential information about the reports that Vy has given you.

A report is an "official or unofficial, elaborate summary prepared by a person or an organization that was mandated to do so."

The following table presents these three categories, their objectives and examples of reports associated with each category.

CATEGORIES OF REPORTS	OBJECTIVES	EXAMPLES
Analytical report	<ul style="list-style-type: none"> <li>Presents the reasoning process</li> <li>Allows for the process to be repeated for further analysis</li> </ul>	<ul style="list-style-type: none"> <li>Financial report</li> <li>Technical report</li> <li>Report on the impact of social media</li> </ul>
Information report	<ul style="list-style-type: none"> <li>Details relevant, necessary and appropriate facts</li> <li>Presents observed and verifiable data</li> <li>Presents quantified or qualified information</li> </ul>	<ul style="list-style-type: none"> <li>Monthly, quarterly or annual report</li> <li>Activity report</li> <li>Status report</li> <li>Communication report</li> </ul>
Recommendation report	<ul style="list-style-type: none"> <li>Leads the reader to adopt the ideas expressed in the report</li> <li>Presents facts that enable comprehension</li> <li>Presents the strong points of the analysis</li> </ul>	<ul style="list-style-type: none"> <li>Business plan</li> <li>Evaluation preparation guide</li> </ul>

The report is therefore an essential business tool. Indeed, it allows its readers to position themselves with regard to the decisions to be made over the short, medium and long term.

Content is often presented in tables to make it easier to understand.

## TASK 2.1

# Using Page and Section Breaks

Vy recognizes the importance of properly preparing one's work. In order for you to get off to a good start, she wants to make sure that you understand the specifics of page and section breaks.

The formatting of an administrative document, regardless of the type, is an aspect to which particular attention must be paid. This is even more true for a report because it could be long and divided into parts (sections) that could run on several pages. Proficiency with page and section breaks is therefore important. For example, if only one page needs to be printed in Landscape mode, you must insert a section break for this page.

### Section

Part or portion of a one- or multi-page document with its own specific formatting.

Terms that may be difficult to understand are defined in the page margins. The definitions used in the guide are inspired in great part by the *Antidote* software.

## Reminder Speech Writing Checklist

- 3 Correct the text of the document *Report\_1*. To help you with this process, here is a checklist to use as a reminder.

ELEMENTS TO CHECK	QUESTIONS TO ASK	✓
1. Sentence structures	Are the sentences well structured? Are the links between the elements adequate?	
2. Grammar	Are the verbs properly conjugated? Are the correct prepositions used?	
3. Spelling mistakes	Are the words properly written? Are there typos?	
4. Punctuation	Do all the sentences have periods? Are the commas in the right places? Do the questions have a question mark?	
5. Abbreviations	Did I check all the abbreviations?	
6. Capital letters	Did I check the forms of address (titles)? The first names? The job titles?	
7. Numbers	Should the numbers be written in number form or letter form?	
8. Vocabulary: Gallicisms, incorrect expressions, imprecise information, repetitions and redundancies	Do I have any doubts regarding the use of certain words? Did I take the time to check them?	
9. Clarity and simplicity	Is there any information that is missing? Is there too much information? Are there sentences that are too long? Will the reader understand all the words that I have used?	
10. Elegance and persuasion	Is the language polite and proper? Is my message elegant, inviting?	



### Tip

To help you correct texts entered on a computer, do not hesitate to use the **Spelling and Grammar** function of Word or Antidote.

The **Reminder** feature refers to concepts which you have already studied and may contain exercises.

The **Tip** feature presents practical advice to help you do an exercise.

## TASK 2.3

# Inserting and Formatting the Various Elements of a Report

By reminding you that, for a report to be complete and look professional, various elements must be integrated into it, such as figures and tables, quotes, notes and references, headers and footers, pagination, appendices and bibliographical references.

These various elements, which are often inserted in reports to provide specific information or to clarify the content, are presented successively according to a pre-established order. Regarding bibliographical references, note that several models exist although the present guide lists only the most common. Furthermore, as you have previously seen, you can add a page entitled 'Webliography' as you have previously seen. However, this remains optional.

**N.B.** In many reports or other reference works, the webliography is not created in a separate page, no matter how many entries there are. Webliographical references are then added to the bibliography. That is why this remains optional.

**2** Using Word, create a cover page for the report on the opinion survey. Enter the information below and lay it out according to the standards.

- Université du Québec à Trois-Rivières
- Report on the opinion survey on the sustainable development of tourism in Québec
- Report presented to the Department of Studies
- Prepared by the Department of Studies in Leisure, Culture and Tourism
- In collaboration with the Québec Tourism Ministry and the Department of Evaluation and Strategic Analysis
- April 20XX

To obtain the logo of the Québec Tourism Ministry, go to the [portailsofad.com](http://portailsofad.com) site.

>> Compare your answers with the ANSWER KEY.

This pictogram tells you that you must use the Internet or a computer to complete the task.

This pictogram indicates that you must download documents from the [portailsofad.com](http://portailsofad.com) site.

A regularly repeated instruction points out the best time to compare your answers with the Answer Key (at the end of the guide).

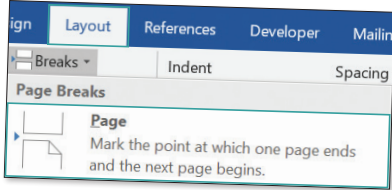


## Inserting a Page Break

The following is how to insert a page break:

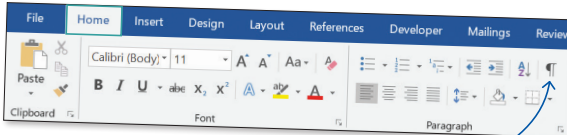
1. Place the cursor where you want the page to finish and the next page to start.
2. In the menu bar, click the **Layout** tab, then **Breaks** and select **Page**.

Figure 2.1



To display the page breaks in order to delete them, click the **Home** tab, then the paragraph symbol.

Figure 2.2



### Keyboard Shortcuts

Using keyboard shortcuts allows you to minimize work using the mouse and thereby reduces repetitive movements on the upper limbs.

The **Ergo** feature offers suggestions of good posture and working positions to adopt at your desk and elsewhere in the workplace.

## Scored Activity 1

 You must now complete Scored Activity 1.

Go to the SOFAD site at [portailsofad.com](http://portailsofad.com) and download the document entitled *Scored Activity 1*.  
Complete the activity and hand it in to your teacher, or send it to your tutor according to the terms provided when you registered.



At the end of Situations 2 and 3, this pictogram tells you to complete a scored activity.







# 1

## *Initiation* to Producing Reports

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# Initiation to Producing Reports



1

**Y**our secretarial training is coming to an end and you must now complete it with a practicum in an organization. Your application was selected at **Grazia Communications**, a company specialized in writing and producing all types of documents.

Your practicum will take place under the supervision of Vy Pham, who has been working there as an administrative assistant for a few years now. In general, her tasks consist of transcribing and laying out texts. Laying out texts

inevitably requires formatting, the insertion of all the elements essential to documentation and, naturally, the addition of the table of contents, the index and sometimes the table of figures, depending on the scope of the document.

Vy is a resource person with Grazia Communications, because she is thorough and committed to a job well done. That is the reason why she will be supervising your practicum. If all goes well, you may be offered a job after the practicum.



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## *Your Assignment*

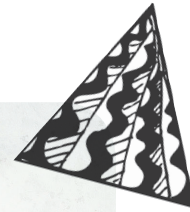
This is the first week of your practicum at Grazia Communications and the Communications manager, Luna Sancha, has told you that you will help Vy transcribe and lay out the text of a report. You therefore decide to review these concepts because several weeks have passed since you have exercised your skills related to producing reports. You will take advantage of this time to review everything, starting with the basic concepts.

Your assignment consists of the following:

1. distinguishing the general characteristics of the report
2. transcribing the text without error
3. laying out the text of a report



# Distinguishing the General Characteristics of the Report



In order to transcribe and lay out the text of a report, you must understand the nature of the text and its characteristics. You are now taking a few minutes to go over the essential information about the reports that Vy has given you.

**A** report is an “official or unofficial, elaborate summary produced by a person or an organization that was mandated to do so.”<sup>1</sup>

## The Objectives of the Report

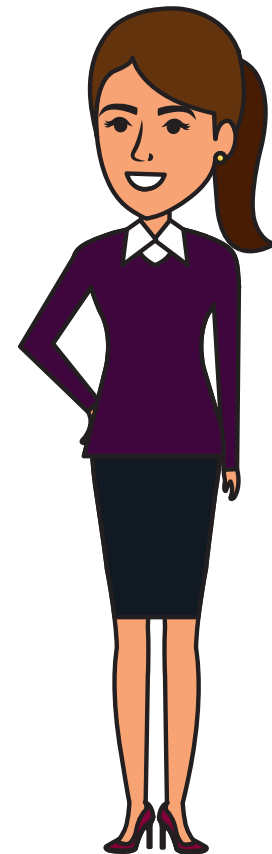
The report presents facts used to inform, explain and present solutions to the reader. It must therefore be objective, drafted in the affirmative form and contain no judgment or point of view, except in the case of recommendation reports.

## Types of Reports

A multitude of types of reports exist such as financial, technical, annual or analytical reports, status reports, business or activity plans, memoranda presented to the government, evaluation preparation guides, etc.

Reports can be categorized into three groups:

- analytical reports – aimed at providing understanding of an issue or situation
- information reports – aimed at providing knowledge
- recommendation reports – aimed at recommending a particular course of action



1. Translated from the French definition from the OFFICE QUÉBÉCOIS DE LA LANGUE FRANÇAISE, *Banque de dépannage linguistique*, [Online], (consulted on April 5, 2018).

The following table presents these three categories, their objectives and examples of reports associated with each category.

CATEGORIES OF REPORTS	OBJECTIVES	EXAMPLES
<b>Analytical report</b>	<ul style="list-style-type: none"> <li>• Presents the reasoning process</li> <li>• Allows for the process to be repeated for further analysis</li> </ul>	<ul style="list-style-type: none"> <li>• Financial report</li> <li>• Technical report</li> <li>• Report on the impact of social media</li> </ul>
<b>Information report</b>	<ul style="list-style-type: none"> <li>• Details relevant, necessary and appropriate facts</li> <li>• Presents observed and verifiable data</li> <li>• Presents quantified or qualified information</li> </ul>	<ul style="list-style-type: none"> <li>• Monthly, quarterly or annual report</li> <li>• Activity report</li> <li>• Status report</li> <li>• Communication report</li> </ul>
<b>Recommendation report</b>	<ul style="list-style-type: none"> <li>• Leads the reader to adopt the ideas expressed in the report</li> <li>• Presents facts that enable comprehension</li> <li>• Presents the strong points of the analysis</li> </ul>	<ul style="list-style-type: none"> <li>• Business plan</li> <li>• Evaluation preparation guide</li> </ul>

The report is therefore an essential business tool. Indeed, it allows its readers to position themselves with regard to the decisions to be made over the short, medium and long term.





Here are a few questions to ask yourself to help you determine the type of report to present:

- What is the objective of this report? To inform, analyze or convince?
- Who is producing this report? An organization, a private company, the government?
- Who is drafting this report? A teacher, a contractor, an employee, a representative of a renowned company?
- Who is this document for? For investors? For the members of a management committee? For company shareholders? For engineers?
- Are there constraints related to the presentation of this report?

You must know the objectives of the report because they will allow you to present the content in a clear, fair and professional manner.

**1** Indicate the category (information, analytical or recommendation report) of the following types of report:

- a) financial report
- b) business plan report
- c) status report
- d) report on the impact of social media
- e) monthly report
- f) activity report

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**>> Compare your answers with the ANSWER KEY. ✓**



## TASK 1.2

# Transcribing Text Without Errors

Upon request from Ms. Sancha, Vy sends you a document for quick transcribing. She will pay specific attention to your transcription speed as well as the quality of the language used.

**T**he touch-typing method, once widely taught, is no longer considered standard practice. The focus today is on transcription time. In fact, younger generations, because of their use of new technologies (including keyboards), are fast and comfortable with entering text, even without using the touch-typing method.

## Mastering the Transcription Method

Because speed of execution is a considerable asset in the field of administration, you should practise for about 15 minutes a day, at a time that is convenient for you, in order to maintain a good cadence.

- 2 a)** Using a stopwatch, time your transcription speed by entering the entire text of the two following pages using Word. This text contains mistakes, but for the purposes of this exercise, concentrate only on the speed of your transcription. You will revise the text in the next question.





## Introduction (Main heading)

One of the first phases of the intervention plan consist of gathering and analyzing information. To this effect, several factors must be taken into account: family factors that often justify an issue; personal factors that influence an individual's behaviour; and several other factor on which we based ourselves for the purposes of this report. Finally, in order to carry out an evaluation of the students, intervention methods are presented.

## Information gathering and analysis (Title)

In the case of a student with a learnings disability, the instructor will first stdy the student's file. The instructor will examining the student's file to see if the problem is known. Let's take a look at Jasmine's case, who is in elementary school in the second grade.

## Student cases (Subtitle)

Since the beginning of the year, Jasmine has been turning her work in on time, but it is often incomplete or riddled with errors. Her teacher, Mrs. Hélène, therefore wanted to analyzes her student's problem more closely. She gave Jasmine a few first grade exercises in order to evaluate the breadth of her knowledge. To her great dismay, Mrs. Hélène discovered that that Jasmine's difficulties date back to the previous year and that they have not been resolved.

When this type if learnings disability situation presents itself, information gathering and analysis must be evaluated as accurately as possible in order to understand the student's reality and determine her real needs. Obviously, the teachers must gather information from everyone who is ready to help the student: parents, support staff, the child and ideally a few specialists or intervention workers. Together, they must try to establish the risk factors. Is there a lack of motivation? How does the child behaves in different learning situations? The resource personnels must collaborate together, identify these elements and work on them using an intervention plan.

## Face to face (Subtitle)

On a blackboard, the teacher presents the problem to the student in order to work through the area she is interested in:

- strengths
- needs
- elements to improve
- elements to develop

The following step consists of communicating at the parents and all of the personnel involved. An intervention plan is then created or modified depending on whether this is a first experience or a re-evaluation. Communication with a parent is essential. The approach used by the staff must, at all times, be established with the greatest of respect in order to reassure and involve the parent. The parents' thoughts as to their perception of their child's difficulties must also be heard and assessed.



After discussion with the parent, the teacher can review a few aspects of the plan to be drafted. For example: the parent mentions that the child does her homework late at night in front of the TV. The student had left that detail out. Trivial or not?

Keep in mind that the objective being to develop the expected skills in the child within a desired timeframe.

“If we could choose the best strategy for Jasmine, it would be the strategy of reciprocal teaching. This strategy, developed by Palinscar and Brown (1984), has helped elementary school children since the 80s understand and successfully to solve a problem that requires reading. Here, Jasmine has difficulty in reading comprehension and mathematics.”

#### Risk factors (Subtitle)

Let's take a look at the systemic vision within which many factors can be found. Let's analyze Jasmine's personal, family and social aspects.

#### Family (Sub subtitle)

The teacher also learned that during homework time, Jasmine's parents are mostly or completely unavailable to help her. This is an example that characterizes the family's values. The parents' previous educational practices influence children a great deal. In this case, they unfortunately influence Jasmine negatively.

#### Social (Sub subtitle)

Socially, Jasmine is a model child. She identifies with younger children as well as older children. Her behaviour is exemplary. In class however, the teacher observed that Jasmine regularly becomes impatient when faced with a (problem) to solve. One of the difficulties Jasmine has is shyness. She therefore needs to work on her courage. According to certain specialists, this skill is one of the most difficult to adopt in a child her age.

#### Intervention method (Title)

#### Planning interventions with the child (Subtitle)

Everyone concerned meets during a meeting to review student cases: the teacher, a specialist qualified in the child's needs, the child and her parents. The teacher expresses the child's priorities in terms of her needs and the team supports these statements with facts. The skills to improve have been determined as well as the schedule. The same is true for the skills to be developed.

#### Conclusion (Main heading)

When analyzing a case such as Jasmine's, it is desired and recommended to analyze the student's file and produce a realistic intervention plans ideally without undue delay. Communication between all those concerned is critical and unavoidable to carry out an intervention plan.

What is the time on your stopwatch? If you have transcribed this text in less than 25 minutes, very good! You are within the allotted time. If it took you longer than 30 minutes, keep practising.

- b) Place the texts that have the mention Heading and Title on a new page, in a new section. To do so, click **Page break** in the **Format** tab, then, under the **Section break** section of the pop-up menu, select **Next page**.
- c) Organize all the texts that have the mention Subtitle and Sub subtitle so that they are in keeping with the following paragraph. To do so, use the paragraph text flow parameters available in the **Paragraph** group of the **Format** tab.

Save your work under *Report\_1* and keep your document open.

## Checking the Quality of the Written English

Text transcription requires you to enter content that has already been written by hand or dictated. Sometimes the text may even have already been entered. However, you must pay particular attention to the quality of the written English. The person who wrote the report could have made a few typos, careless mistakes or errors of grammar or punctuation.





## Reminder Speech Writing Checklist

- 3 Correct the text of the document *Report\_1*. To help you with this process, here is a checklist to use as a reminder.

ELEMENTS TO CHECK	QUESTIONS TO ASK	✓
1. Sentence structures	Are the sentences well structured? Are the links between the elements adequate?	
2. Grammar	Are the verbs properly conjugated? Are the correct prepositions used?	
3. Spelling mistakes	Are the words properly written? Are there typos?	
4. Punctuation	Do all the sentences have periods? Are the commas in the right places? Do the questions have a question mark?	
5. Abbreviations	Did I check all the abbreviations?	
6. Capital letters	Did I check the forms of address (titles)? The first names? The job titles?	
7. Numbers	Should the numbers be written in number form or letter form?	
8. Vocabulary: Gallicisms, incorrect expressions, imprecise information, repetitions and redundancies	Do I have any doubts regarding the use of certain words? Did I take the time to check them?	
9. Clarity and simplicity	Is there any information that is missing? Is there too much information? Are there sentences that are too long? Will the reader understand all the words that I have used?	
10. Elegance and persuasion	Is the language polite and proper? Is my message elegant, inviting?	



### Tip

To help you correct texts entered on a computer, do not hesitate to use the **Spelling and Grammar** function of Word or Antidote.

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ISBN 978-2-89798-142-6



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