



Plan2goTM

Admin Cadet Training Manual

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1. Workplace Health and Safety (WHS)

As an employee of Plan2go you have a duty whilst at work to care for your own health and safety and not adversely affect the safety of others. You should also comply with instructions, policies and procedures to do with WHS.

Plan2go have implemented a WHS management system that encompasses the Plan2go WHS policy (what we are going to do) and procedures (how we are going to do it).

Download the [Plan2go WHS Management System](#)

Plan2go have also developed a checklist to assist staff with assessing their computer workstation and identify any current health concerns that may be present.

Assistance will then be made available to staff as needed to assist them with working in a pain free environment.

Download the [Plan2go Workstation self-assessment checklist](#)

2. Digital Brand and Style Guidelines

The Plan2go Digital Brand and Style Guidelines ensure consistency and accuracy in publications and other forms of communication at Plan2go. Using the style guide will ensure a consistently high standard of work and will help clarify some situations where there may be variations.

This guide has three purposes

1. to encourage consistent editorial style across all business documents
2. to enable these publications to be of a uniform standard in keeping with our professional reputation
3. to provide a quick guide to common areas of confusion in editorial practice.

Download the [Plan2go Digital Brand and Style Guidelines](#)

3. Plan2go templates

Templates have been developed using the Plan2go Branding Toolkit and Style Guide to provide a consistent format for Plan2go documents.

[View Plan2go templates](#)



4. Designing a business document

When creating a word processed document, spreadsheet, database or PowerPoint presentation you should consider the following elements before you commence.

4.1 Purpose for the document

What is the reason you are preparing the document? Are you answering a customer enquiry, creating a petty cash sheet, managing customer records or preparing for a presentation? Is it to communicate detailed statistics where lots of figures and graphs will need to be used?

Deciding the reason for the document will help you to think about the amount of detail you need to include.

4.2 Identify the audience

The next logical question is: Who is my document for? Is it for customers, colleagues or potential clients? Identifying the audience will help you to customise your document to their individual needs. For example, avoid using jargon with those who have no idea what you are talking about! Use plain English so your audience will understand.

4.3 Method of communication

Now you know the reason why you are preparing this presentation and who your audience is going to be, the next question is:

- How am I going to present my work?
- Will it be a formal business letter or a quick email to a colleague?
- Are there any organisation templates that I can use?
- Is the tone appropriate for the type of document?
- Are the database records easy to update with well-designed forms?

It is very important to remember your document is about the information you are communicating, not about your ability to use every function, piece of clipart, font style or special effect!

In particular, when preparing PowerPoint presentations, sound and pictures should be used sparingly. If there are too many distractions the audience will be more focused on listening for what sound comes next, or what the picture is about to do, and you will lose the focus of your message.



4.4 Consistency is the key

With all business documents the best motto is “whatever you do, do consistently”. This is certainly the case with choice of fonts, text size, colours and other formatting features such as bullet points.

For example, in PowerPoint use the Master Slide to set up your colour schemes/themes and if your presentation is to be projected on to a large screen, test it first to make sure it is not too bright or dark. With a long document such as a report, use the same bullet styles throughout your document.

5. Checking documents

It is important to check all documents for the following:

- Accuracy of information
- Consistency of layout
- Ensuring instructions with regard to content and format have been followed
- Grammar
- Proofreading
- Spelling

5.1 Accuracy of information

When checking Plan2go documents be sure to check that the information is accurate. It is important to the reputation of Plan2go to produce accurate documents. Publishing incorrect information can lead to complaints from both staff and customers. If you are not sure you should ask your supervisor for help.

5.2 Consistency of layout

All documents created for Plan2go should conform to the style guide. This helps to ensure a consistency of layout.

5.3 Formatting instructions

All documents created for Plan2go should conform to the style guide as well as any specific changes requested by your supervisor.



5.4 Grammar and spelling

All documents created for Plan2go should be carefully checked to ensure both the grammar and spelling are correct. Refer to the section below on proof reading.

5.5 Proof reading

The following information has been taken from [The Writer's handbook - How to Proofread](#). (2014)

Proofreading means examining your text carefully to find and correct typographical errors and mistakes in grammar, style, and spelling. Here are some tips.

BEFORE YOU PROOFREAD

Be sure you've revised the larger aspects of your text. Don't make corrections at the sentence and word level if you still need to work on the focus, organization, and development of the whole paper, of sections, or of paragraphs.

Set your text aside for a while (15 minutes, a day, a week) between writing and proofing. Some distance from the text will help you see mistakes more easily.

Eliminate unnecessary words before looking for mistakes. See the writing center handout [how to write clear, concise, direct sentences](#).

Know what to look for. From the comments of your professors or a writing center instructor on past papers, make a list of mistakes you need to watch for.

WHEN YOU PROOFREAD

- **Work from a printout, not the computer screen.** (But see below for computer functions that can help you find some kinds of mistakes.)
- **Read out loud.** This is especially helpful for spotting run-on sentences, but you'll also hear other problems that you may not see when reading silently.
- **Use a blank sheet of paper to cover up the lines below the one you're reading.** This technique keeps you from skipping ahead of possible mistakes.
- **Use the search function of the computer to find mistakes you're likely to make.** Search for "it," for instance, if you confuse "its" and "it's;" for "-ing" if dangling modifiers are a problem; for opening parentheses or quote marks if you tend to leave out the closing ones.
- **If you tend to make many mistakes, check separately for each kind of error, moving from the most to the least important, and following whatever technique works best for you to identify that kind of mistake.** For instance, read through once (backwards, sentence by sentence) to check for fragments; read through again (forward) to be sure



subjects and verbs agree, and again (perhaps using a computer search for "this," "it," and "they") to trace pronouns to antecedents.

- **End with a spelling check, using a computer spelling checker or reading backwards word by word.** But remember that a spelling checker won't catch mistakes with homonyms (e.g., "they're," "their," "there") or certain typos (like "he" for "the").

6. Printing

While the attempt is to progress to a paperless world, documents will always need to be printed. When printing it is important to consider the following things:

- Which printer will be used
- Number of copies and whether to collate or group the copies (e.g. pages 1,2,3,1,2,3,1,2,3 or pages 1,1,1 and then 2,2,2 and then 3,3,3)
- Use of colour, black and white or grey scale
- Which pages to print
- Scaling and printing more than one page per sheet
- Printing on both sides of the paper (if possible)

Make yourself aware of the [Plan2go Sustainability Policy](#) - consumables section

7. Keyboarding

Plan2go recommends the following training from Tipp10 for all staff developing their keyboarding skills. You can access this training to use on or offline. This program is designed to teach you how to touch type and will assist you in developing your keyboarding skills, speed and accuracy.

7.1 Register for Tipp10 to use online

1. Click here to register <http://www.tipp10.com/en/auth/register/>
2. You will receive a confirmation email to your nominated address
3. Click on the email confirmation
4. Read the introduction on the first page
5. Then select the Training tab or the Go to training button



7.2 Download Tipp10 to use offline

1. Click here to download and install <http://www.tipp10.com/en/download/>
2. When the program opens read through the Introduction and then select Launch TIPP10

8. Word processing

Plan2go recommends the following training for staff undertaking word processing.

Topic	Link
Create a document	http://office.microsoft.com/en-au/word-help/video-start-using-word-VA103982185.aspx?CTT=5&origin=HA104030981
Save a document	http://office.microsoft.com/en-au/word-help/video-save-a-word-document-VA103982188.aspx?CTT=5&origin=VA103982188
Format a document	http://office.microsoft.com/en-au/word-help/video-format-a-document-VA103982191.aspx?CTT=5&origin=VA103982188
How to change the font	http://www.dummies.com/how-to/content/how-to-change-the-font-in-word-2013.html
How to Adjust Line and Paragraph Spaces in Word 2013	http://www.dummies.com/how-to/content/how-to-adjust-line-and-paragraph-spaces-in-word-20.html
Custom margins	http://office.microsoft.com/en-au/word-help/video-custom-margin-VA104097725.aspx?CTT=5&origin=HA104030981
Heading styles	http://office.microsoft.com/en-au/word-help/add-a-heading-HA102809690.aspx?CTT=1
Format Borders	http://office.microsoft.com/en-au/word-help/format-borders-HA102849681.aspx?CTT=1
How to Make Lists with Bullets and Numbers in Word 2013	http://www.dummies.com/how-to/content/how-to-make-lists-with-bullets-and-numbers-in-word.html
Insert pictures	http://office.microsoft.com/en-au/word-help/insert-pictures-HA102840169.aspx?CTT=1
Insert a table	http://office.microsoft.com/en-au/word-help/insert-a-table-HA102840167.aspx?CTT=1



Topic	Link
Add header or footer	http://office.microsoft.com/en-au/word-help/add-a-header-or-footer-HA102849855.aspx?CTT=1
Use landscape and portrait orientation	http://office.microsoft.com/en-au/word-help/video-use-landscape-and-portrait-orientation-VA104141335.aspx?CTT=5&origin=HA104030981
Working with watermarks	http://office.microsoft.com/en-au/word-help/video-working-with-watermarks-VA104015466.aspx?CTT=5&origin=HA104030981
Mail Merge	http://office.microsoft.com/en-au/word-help/video-mail-merge-VA104092878.aspx?CTT=5&origin=HA104030981
Top tips for working online	http://office.microsoft.com/en-au/word-help/video-top-tips-for-working-in-word-online-VA104238132.aspx?CTT=5&origin=HA104030981
Insert a screenshot or screen clipping	http://office.microsoft.com/en-au/word-help/insert-a-screenshot-or-screen-clipping-HA010355185.aspx?CTT=1
Insert SmartArt	http://office.microsoft.com/en-au/novice/lets-insert-and-lay-out-smartart-graphics-HA010376910.aspx?CTT=1
Templates	http://office.microsoft.com/en-au/word-help/edit-templates-HA104053479.aspx?CTT=1
Online Help	http://office.microsoft.com/en-au/support/better-help-HA103929298.aspx
Create a document	http://office.microsoft.com/en-au/word-help/video-start-using-word-VA103982185.aspx?CTT=5&origin=HA104030981



9. Spreadsheets

Plan2go recommends the following training for staff undertaking spreadsheets.

Topic	Link
Excel Basics	
Getting Started with Excel	http://www.gcflearnfree.org/office2013/excel2013/4
Creating and Opening Workbooks	http://www.gcflearnfree.org/office2013/excel2013/5
Saving and Sharing Workbooks	http://www.gcflearnfree.org/office2013/excel2013/6
Cell Basics	http://www.gcflearnfree.org/office2013/excel2013/7
Modifying Columns, Rows and Cells	http://www.gcflearnfree.org/office2013/excel2013/8
Formatting Cells	http://www.gcflearnfree.org/office2013/excel2013/9
Worksheet Basics	http://www.gcflearnfree.org/office2013/excel2013/10
Page Layout	http://www.gcflearnfree.org/office2013/excel2013/11
Printing Workbooks	http://www.gcflearnfree.org/office2013/excel2013/12
Formulas and Functions	
Simple Formulas	http://www.gcflearnfree.org/office2013/excel2013/13
Complex Formulas	http://www.gcflearnfree.org/office2013/excel2013/14
Relative and Absolute References	http://www.gcflearnfree.org/office2013/excel2013/15
Functions	http://www.gcflearnfree.org/office2013/excel2013/16
Working with Data	
Freezing Panes and View Options	http://www.gcflearnfree.org/office2013/excel2013/17
Sorting Data	http://www.gcflearnfree.org/office2013/excel2013/18
Charts	http://www.gcflearnfree.org/office2013/excel2013/22



10. Document samples

The following links contain samples of the following workplace documents:

- [Letter](#)
- [Email](#)
- [Staff bulletin](#)
- [Fax](#)
- [Report](#)

