

## **Design and produce business documents (Office 2016)**

This workbook supports BSBITU306 Design and produce business documents in the BSB Business Services Training Package.

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Software Publications writing team

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# BSBITU306 Design and produce business documents

## Application

This unit describes the skills and knowledge required to design and produce various business documents and publications. It includes selecting and using a range of functions on a variety of computer applications.

It applies to individuals who possess fundamental skills in computer operations and keyboarding. They may exercise discretion and judgement using appropriate theoretical knowledge of document design and production to provide technical advice and support to a team.

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

## Elements and Performance Criteria

<b>Element</b> <i>Elements describe the essential outcomes.</i>	<b>Performance Criteria</b> <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>	<b>Page reference</b>
1. Select and prepare resources	1.1 Select and use appropriate technology and software applications to produce required business documents	Throughout workbook
	1.2 Select layout and style of publication according to information and organisational requirements	Throughout workbook
	1.3 Ensure document design is consistent with company and/or client requirements using basic design principles	22–30
	1.4 Discuss and clarify format and style with person requesting the document/publication	23, 24, 31, 41, 146
2. Design document	2.1 Identify, open and generate files and records according to task and organisational requirements	Throughout workbook
	2.2 Design document to ensure efficient entry of information and to maximise presentation and appearance of information	22–30
	2.3 Use a range of functions to ensure consistency of design and layout	Throughout workbook
	2.4 Operate input devices within designated requirements	Throughout workbook

<b>Element</b> <i>Elements describe the essential outcomes.</i>	<b>Performance Criteria</b> <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>	<b>Page reference</b>
3. Produce document	3.1 Complete document production within designated timelines according to organisational requirements	18
	3.2 Check document produced to ensure it meets task requirements for style and layout	Throughout workbook
	3.3 Store document appropriately and save document to avoid loss of data	Throughout workbook
	3.4 Use manuals, training booklets and/or help-desks to overcome basic difficulties with document design and production	19, 50
4. Finalise document	4.1 Proofread document for readability, accuracy and consistency of language, style and layout prior to final output	Throughout workbook
	4.2 Make any modifications to document to meet requirements	Throughout workbook
	4.3 Name and store document in accordance with organisational requirements and exit application without data/loss damage	Throughout workbook
	4.4 Print and present document according to requirements	Throughout workbook

## Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

Skill	Performance Criteria	Description	Page reference
Reading	2.1, 2.2, 3.2, 3.4, 4.1	<ul style="list-style-type: none"> <li>Recognises and interprets textual information from a range of sources to determine and adhere to requirements</li> </ul>	22–26
		<ul style="list-style-type: none"> <li>Applies strategies to self-correct and verify clarity and conformity of information</li> </ul>	24–26, 31, 80, 101, 120, 131, 157, 171
Writing	2.2, 2.3, 3.1, 4.2, 4.3	<ul style="list-style-type: none"> <li>Develops documents using required format, accurate spelling and grammar and terminology specific to requirements</li> </ul>	Throughout workbook
		<ul style="list-style-type: none"> <li>Organises content to support purposes and audience of material, using clear and logical language</li> </ul>	Throughout workbook
Oral communication	1.4	<ul style="list-style-type: none"> <li>Confirms requirements with relevant personnel using specific terminology and listening and questioning techniques</li> </ul>	23, 24, 31, 41, 146
Navigate the world of work	1.2, 1.3, 2.1, 2.4, 3.1, 3.2, 4.2-4.4	<ul style="list-style-type: none"> <li>Recognises and follows explicit and implicit protocols and meets expectations associated with own role</li> </ul>	Throughout workbook
Interact with others	1.4	<ul style="list-style-type: none"> <li>Selects and uses appropriate conventions and protocols when communicating in a range of familiar work contexts</li> </ul>	19, 22–23, 57, 98
Get the work done	1.1-1.3, 2.1-2.4, 3.1-3.4, 4.1-4.4	<ul style="list-style-type: none"> <li>Uses basic features and functions within applications to access, store, organise data and perform routine work tasks</li> </ul>	Throughout workbook

## Assessment for this Unit

This Unit is assessed by:

- creating a letterhead template
- adding a record to a database
- planning and creating a letter incorporating data from a spreadsheet and a database
- planning and creating a flyer.

## Assessment Requirements v1.0

### Performance Evidence

Evidence of the ability to:	Page reference
<ul style="list-style-type: none"> <li>• select appropriate technology and software for design and production of business documents</li> </ul>	Throughout workbook
<ul style="list-style-type: none"> <li>• adhere to organisational requirements when:               <ul style="list-style-type: none"> <li>• selecting layout and style</li> <li>• opening and generating files</li> <li>• producing documents within designated timelines</li> <li>• naming and storing documents</li> <li>• printing and presenting documents</li> </ul> </li> </ul>	Throughout workbook
<ul style="list-style-type: none"> <li>• adhere to task requirements when producing documents including:               <ul style="list-style-type: none"> <li>• applying basic design principles</li> <li>• applying consistent formatting</li> <li>• using appropriate styles</li> <li>• using correct layouts</li> <li>• proofreading as required</li> </ul> </li> </ul>	Throughout workbook
<ul style="list-style-type: none"> <li>• use appropriate data storage options</li> </ul>	Throughout workbook
<ul style="list-style-type: none"> <li>• apply knowledge of functions and features of contemporary computer applications</li> </ul>	Throughout workbook
<ul style="list-style-type: none"> <li>• print and present completed documents.</li> </ul>	Throughout workbook

### Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:	Page reference
<ul style="list-style-type: none"> <li>• identify appropriate technology for production requirements</li> </ul>	30, 32–33
<ul style="list-style-type: none"> <li>• describe functions and features of contemporary computer applications</li> </ul>	Throughout workbook
<ul style="list-style-type: none"> <li>• outline organisational policies, plans and procedures</li> </ul>	22–26, 24–27–31
<ul style="list-style-type: none"> <li>• list organisational requirements for document design e.g. style guide.</li> </ul>	24–30

## How to use this workbook

This workbook will provide you with skills required to integrate data created in one application into a file created in another application. Copying and pasting data from one application to another removes the need to enter the same data more than once, saving time and reducing the risk of data entry errors.

The following applications are used:

- Word 2016
- Excel 2016
- Access 2016
- PowerPoint 2016

This workbook has been arranged into workplace scenarios. A list of tasks is included at the beginning of each section. The following is a summary of each section.

Section 1 Office procedures	This section includes basic Windows 10 instructions and document design and planning fundamentals.
Section 2 Care Cosmetics	This section includes the creation and editing of Word documents and templates. It also includes basic spreadsheets and charts.
Section 3 Care Cosmetics (continued)	This section covers integrating Excel data into Word documents. You are introduced to creating and using Access databases. You also create PowerPoint presentations.
Section 4 Hillside College	This section covers integrating Excel functions and charts into Word documents and PowerPoint presentations.
Section 5 Accurate Training Centre	This section covers database queries for a mail merge. Excel data analysis and more charts are also included.
Section 6 Main Mags Bookstore	This section covers integrating advanced features of all Office applications to create business documents.

## Spelling and grammar in this workbook

At times different spellings of one word are used in this workbook.

References to buttons, groups, tabs and other features are used in the same way as they appear in the application so instructions resemble the application as closely as possible.

In all other instances Australian spelling is followed, for example, the Font Color button is used to change the colour of selected text.

## Images used in this book

Your monitor size and resolution will determine how Office applications will display on your screen. There will be variation in the number of buttons shown on the Ribbon and the format of some buttons. For example on a bigger screen the Copy button has text on it  Copy whereas on a smaller screen it displays as , therefore sometimes your screen or buttons may vary from those shown.

## Creating a memo template

You will create a memo template based on the Care Cosmetics letterhead template. This template will contain field codes to facilitate data entry when a memo is created.

The completed template is shown on page 43.

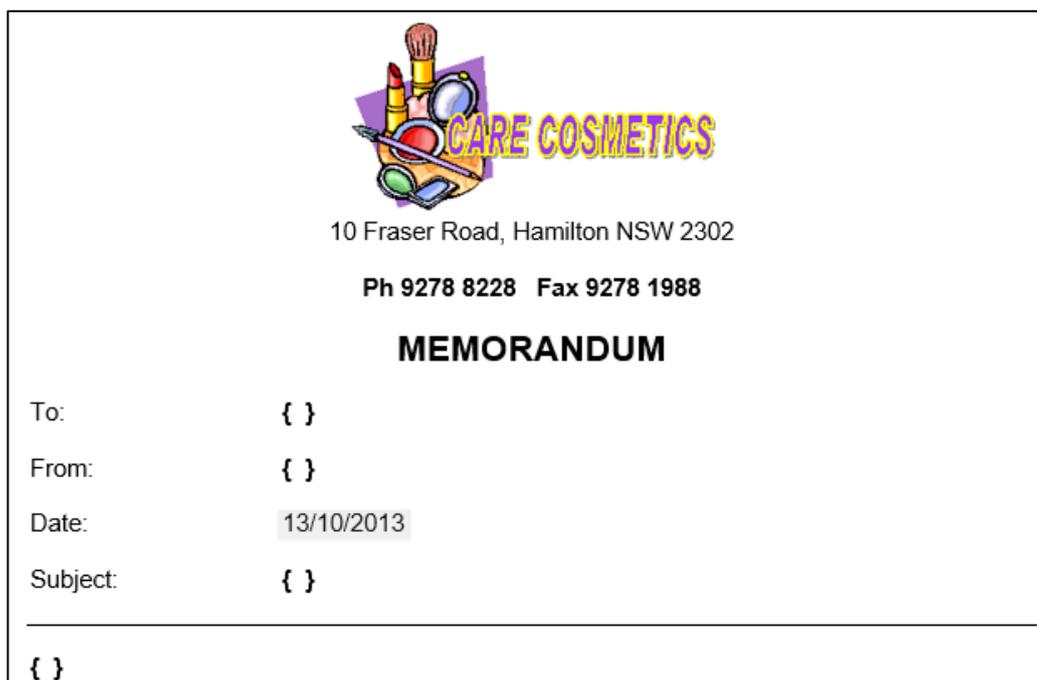
### Exercise 6

1. Click on **FILE** and click on **New**.
2. Click on **PERSONAL** to display your templates.
3. Click on **Care Cosmetics letterhead**. A document will open based on the template.
4. Press Ctrl End.
5. Type: **MEMORANDUM** and format to Arial, 16 pt, bold, centred.
6. Press Enter twice and change to Arial, 11 pt, left aligned, not bold.
7. Type: **To:**
8. Check the Left Tab  is shown at the left of the horizontal ruler.
9. Click on the horizontal ruler at 4 cm to insert a left aligned tab.
10. Press the Tab key to indent the cursor.
11. Press Ctrl F9 then press the End key. A field code will be inserted into the document { }.
12. Press Enter twice and type: **From:**
13. Press Tab and insert a field code.
14. Press Enter twice and type: **Date:**
15. Press Tab and the press Alt Shift D to insert the date.

This date will automatically update every time a document is created from the template.

16. Complete the rest of the template shown below.

To insert the line type --- (three hyphens), then press Enter.



  
10 Fraser Road, Hamilton NSW 2302  
Ph 9278 8228 Fax 9278 1988

**MEMORANDUM**

To: { }

From: { }

Date: 13/10/2013

Subject: { }

---

{ }

# Mail merge wizard

The Step-by-Step Mail Merge Wizard displays instructions in the Mail Merge Task Pane.

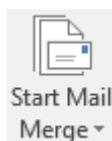
## Exercise instructions

Exercise 15 to Exercise 19 must be completed in one session. Make sure you have enough time to complete these exercises without closing Word.

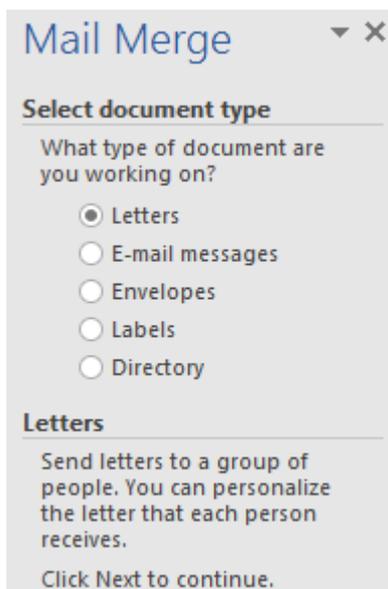
## Selecting the main document

### Exercise 15

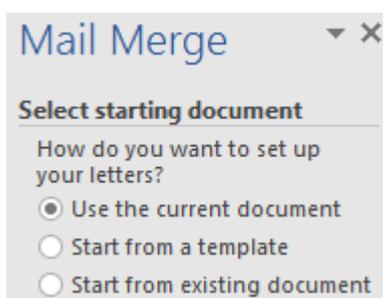
1. Create a new document based on the **Care Cosmetics letterhead** template. Press Ctrl End.
2. Display the Mailings Ribbon.



3. Click on the Start Mail Merge button **Start Mail Merge** from the Start Mail Merge Group and select **Step-by-Step Mail Merge Wizard...**. The Mail Merge Task Pane will display at the right of the screen.



4. Check the *Letters* option is selected from the Select document type section.
5. Click on the [Next: Starting document](#) hyperlink displayed at the bottom of the Task Pane.
6. Step 2 will appear on the Task Pane. Check *Use the current document* option is selected.



7. Click on the [Next: Select recipients](#) hyperlink.  
Step 3 of 6 will appear.

# Formatting a workbook

## Exercise 22

1. Use Excel to create the workbook below using the following instructions:
  - a. Widen column A by dragging the column divider between columns A and B to the right.



- b. Select cells A1 to C1 and click on the Merge & Center button  Merge & Center on the Home Ribbon. Format to 12 pt bold.
  - c. Bold cells B3 and C3 and add a bottom border.
  - d. Format row 16 to bold and add a top and double bottom border.

	A	B	C
1	<b>Sales for January and February</b>		
2			
3		<b>January</b>	<b>February</b>
4	Sports massage oil	15000	25000
5	Sports bath oil	8600	9875
6	Relaxing massage oil	8500	8750
7	Relaxing bath oil	5500	5875
8	Refreshing massage oil	7600	8520
9	Refreshing bath oil	8700	8600
10	Mountain fresh body spray	5400	5300
11	Mountain fresh soap	3200	3620
12	Mountain fresh lotion	6420	6200
13	Max sunscreen	6524	6300
14	Baby talc	8750	8950
15			
16	<b>Total sales</b>		

2. Select from cell B4 to cell C16 and click on the AutoSum button  AutoSum on the Home Ribbon. This will total both columns.

Ctrl 1 3. With the numbers selected, using the Number Group of the Home Ribbon, click on the  of the Number Format list .

4. Select Currency.
5. With the numbers still selected, click on the Decrease Decimal button  twice.
6. Save the workbook as **Projected sales - Jan&Feb** in your working folder.
7. Click on  and select  to close the workbook.
8. Leave Excel open for the next exercise.

# Linking Excel data and charts

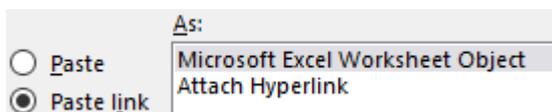
The teachers are meeting next week to review all mid-semester exam results and would like that information in a PowerPoint presentation.

## Exercise 70

1. Open PowerPoint and create a blank presentation.
2. Display the Design Ribbon. From the Themes Group, click on  and select the Integral theme.
3. Click where it displays *Click to add title* and type: **Hillside College**
4. Click where it displays *Click to add subtitle* and type: **Mid-semester exam results** then press Enter and type: **Rooms 10 and 11**
5. Click outside the subtitle.



6. Save the presentation in your working folder with the file name **Hillside College mid-semester**
7. From the Home tab click on  and select a Title Only slide.
8. Click in the title and type: **Room 10 students**
9. Switch to Excel and open the **Mid-semester exam** workbook. Check the Exam results sheet tab is displayed.
10. Click and drag across cells A3 to I13 to select.
11. Click on .
12. Switch to PowerPoint.
13. Click on the  at the bottom of the Paste button. Select Paste Special.
14. Select the *Paste link* option and check Microsoft Office Excel Worksheet Object is selected as shown below.



15. Click on OK.  
The Excel data will be pasted into the slide as an object.

## Mail merge using a database

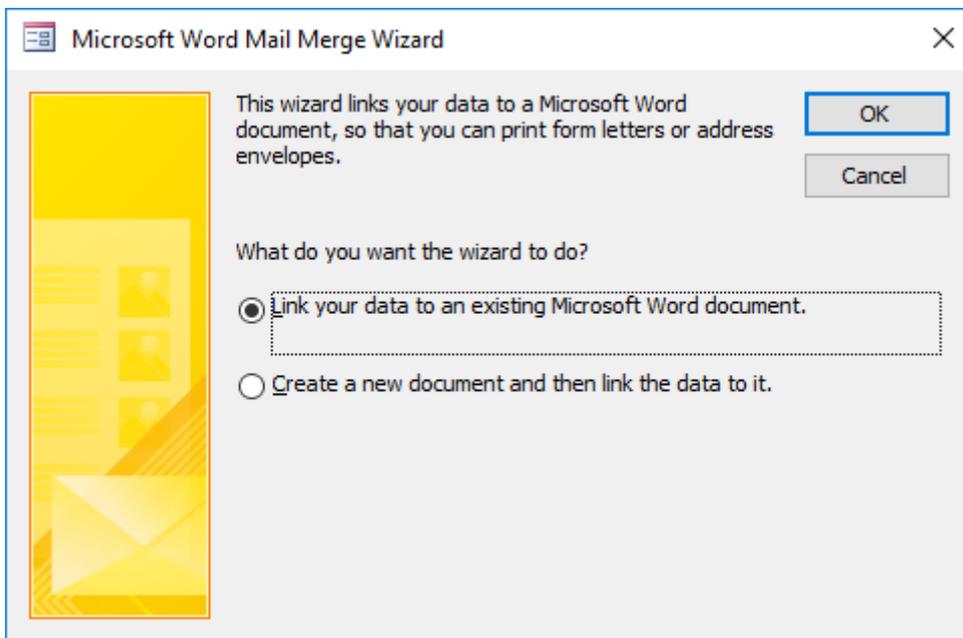
### Task

Send a letter to all business students inviting them to a lunch for the Certificate Presentation at 12.30 pm on Thursday 18 December in Lecture Theatre 1.

Use the query called **qryBusinessStudents** in the Accurate Training student database.

### Exercise 82

1. In the **Accurate Training student database** click on the query called **qryBusinessStudents** in the Navigation Pane. You may need to display the Navigation Pane by clicking on the Shutter Bar Open/Close Button **>>**, to access the query.
2. Display the External Data Ribbon. Click on **Word Merge** from the Export Group.



3. Click in the *Create a new document and then link the data to it* option.
4. Click on OK. This will allow you to type the letter in a new document and insert the fields from the query.  
Word will display ready for you to type the letter.
5. Change the top margin to 5 cm.
6. Remove all line and paragraph spacing.
7. Type today's date.
8. Press Enter three times.
9. At the bottom of the Task Pane click on **Next: Starting document**.
10. Click on **Next: Select recipients**.
11. The recipients have already been selected (from Access). Click on **Next: Write your letter**.
12. Click on **More items...**.

## Assessment material and equipment

Make sure you have the following before you start this assessment:

### If you are using a printed version of this workbook

Your own copy of this workbook

Pen/pencil

### If you are using an electronic version of this workbook

Follow the instructions of your assessor on how to complete and submit tasks.

### All candidates

Access to a computer with:

Windows 10

Access 2016

Excel 2016

PowerPoint 2016

Word 2016

access to a printer

The following assessment files:

Brisbane Realty visitor list.xlsx

Document plan.pdf

Properties details.xlsx

Property database.accdb

# Evidence guide

## Elements and performance criteria

<b>Element</b> <i>Elements describe the essential outcomes.</i>	<b>Performance Criteria</b> <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>	<b>Assessment tasks</b>
1. Select and prepare resources	1.1 Select and use appropriate technology and software applications to produce required business documents	Assessment tasks 2, 3 and 4
	1.2 Select layout and style of publication according to information and organisational requirements	All assessment tasks
	1.3 Ensure document design is consistent with company and/or client requirements using basic design principles	All assessment tasks
	1.4 Discuss and clarify format and style with person requesting the document/publication	Assessment tasks 3 and 4
2. Design document	2.1 Identify, open and generate files and records according to task and organisational requirements	All assessment tasks
	2.2 Design document to ensure efficient entry of information and to maximise presentation and appearance of information	All assessment tasks
	2.3 Use a range of functions to ensure consistency of design and layout	All assessment tasks
	2.4 Operate input devices within designated requirements	All assessment tasks
3. Produce document	3.1 Complete document production within designated timelines according to organisational requirements	Time limit should be applied to assessment tasks
	3.2 Check document produced to ensure it meets task requirements for style and layout	Assessment tasks 3 and 4
	3.3 Store document appropriately and save document to avoid loss of data	All assessment tasks
	3.4 Use manuals, training booklets and/or help-desks to overcome basic difficulties with document design and production	Assessment task 4
4. Finalise document	4.1 Proofread document for readability, accuracy and consistency of language, style and layout prior to final output	Assessment tasks 2, 3 and 4
	4.2 Make any modifications to document to meet requirements	Assessment tasks 2, 3 and 4
	4.3 Name and store document in accordance with organisational requirements and exit application without data/loss damage	All assessment tasks
	4.4 Print and present document according to requirements	Assessment tasks 1, 3 and 4

## Assessment Requirements v1.0

### Performance Evidence

Evidence of the ability to:	Assessment task
<ul style="list-style-type: none"> <li>select appropriate technology and software for design and production of business documents</li> </ul>	All assessment tasks
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<ul style="list-style-type: none"> <li>adhere to task requirements when producing documents including:               <ul style="list-style-type: none"> <li>applying basic design principles</li> <li>applying consistent formatting</li> <li>using appropriate styles</li> <li>using correct layouts</li> <li>proofreading as required</li> </ul> </li> </ul>	Assessment tasks 1, 3 and 4
<ul style="list-style-type: none"> <li>use appropriate data storage options</li> </ul>	All assessment tasks
<ul style="list-style-type: none"> <li>apply knowledge of functions and features of contemporary computer applications</li> </ul>	All assessment tasks
<ul style="list-style-type: none"> <li>print and present completed documents.</li> </ul>	Assessment tasks 1, 3 and 4

### Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:	Assessment task
<ul style="list-style-type: none"> <li>identify appropriate technology for production requirements</li> </ul>	All assessment tasks
<ul style="list-style-type: none"> <li>describe functions and features of contemporary computer applications</li> </ul>	All assessment tasks
<ul style="list-style-type: none"> <li>outline organisational policies, plans and procedures</li> </ul>	All assessment tasks
<ul style="list-style-type: none"> <li>list organisational requirements for document design e.g. style guide.</li> </ul>	Assessment tasks 2, 3 and 4