Design and produce text documents (Word 2016)

This workbook supports BSBITU303 Design and produce text documents in the BSB Business Services Training Package.

BSBITU303 Design and produce text documents

Application

This unit describes the skills and knowledge required to design and develop text-based documents using advanced features of word processing software.

It applies to individuals who possess fundamental skills in computer operations and keyboarding, and basic skills in operation of word processing software. They may work as individuals who provide administrative support within an enterprise, or may be technical/knowledge experts responsible for production of their own word processed documents.

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

Elements and Performance Criteria

Element *Elements describe the essential outcomes.*	Performance Criteria *Performance criteria describe the performance needed to demonstrate achievement of the element.*	Page reference
1. Prepare to produce word processed documents	1.1 Use safe work practices to ensure ergonomic, work organisation, energy and resource conservation requirements are met	Software Publications WHS supplement
	1.2 Identify document purpose, audience and presentation requirements, and clarify with relevant personnel as required	22–25, 31, 206
	1.3 Identify organisational and task requirements for text-based business documents to ensure consistency of style and image	26–28, 31, 206
2. Design word processed documents	2.1 Design document structure and layout to suit purpose, audience and information requirements of task	24–25, 31, 206
	2.2 Design document to enhance readability and appearance, and to meet organisational and task requirements for style and layout	24–31, 206
	2.3 Use style sheets and automatic functions to ensure consistency of design and layout	26–28, 41, 52, 83–90, 120–130, 169–174
3. Add tables and other data	3.1 Insert a standard table into a document, changing cells to meet information requirements	44–51, 148–160, 166–167, 183–184
	3.2 Insert and delete columns and rows as necessary	149–151, 167
	3.3 Insert images and other data to meet required specifications	66–70, 96–102, 141–143

Element *Elements describe the essential outcomes.*	Performance Criteria *Performance criteria describe the performance needed to demonstrate achievement of the element.*	Page reference
4. Produce text documents	4.1 Use advanced software functions to enable efficient production of documents	Throughout workbook
	4.2 Enter or import, and edit text and other data to meet required specifications	Throughout workbook
	4.3 Preview, adjust and print documents in accordance with organisational and task requirements	Throughout workbook
	4.4 Name and store text documents, in accordance with organisational requirements and exit application without information loss/damage	15–18, 36–38, 41
	4.5 Prepare text documents within designated timelines and organisational requirements for speed and accuracy	Throughout workbook
	4.6 Use manuals, user documentation and online help to overcome problems with document design and production	19

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	2.2, 4.3, 4.4, 4.6	• Recognises and interprets textual information from a range of sources to determine and adhere to requirements	Whole workbook
Writing	2.1-2.3, 3.3, 4.2-4.5	• Develops documents using required format, accurate spelling and grammar and terminology specific to requirements	Whole workbook
		• Organises content to support purpose and audience of material using clear and logical language	Whole workbook
Oral communication	1.2	• Uses specific and direct language, and listening and questioning techniques to clarify requirements	23, 145, 206
Navigate the world of work	1.1-1.3, 2.1-2.3, 3.1, 3.3, 4.2-4.5	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role	Whole workbook and Software Publications WHS supplement
Interact with others	1.2	• Collaborates with others to achieve joint outcomes	24, 31
Get the work done	2.1-2.3, 3.1-3.3, 4.1-4.6	• Uses advanced features within applications to address routine and complex work tasks	Whole workbook

Assessment for this Unit

This Unit is assessed by:

- observation of good WHS practices
- using a manual or help facility
- completing a time management plan
- creating a logo
- formatting a document
- creating a letter template
- creating a mail merge document
- creating a plan for a newsletter
- creating a newsletter.

Assessment Requirements v1.0

Performance Evidence

Evidence of the ability to:	Page reference

• adhere to organisational requirements and strategies when creating text documents including:
  • ergonomic requirements
  • energy and resource requirements
	Software Publications WHS supplement

• adhere closely to task requirements and required specifications by:
  • following designated timelines
  • achieving consistency of style and image
  • ensuring correct editing and style requirements
  • adhering to designated timelines
	18, 26–31

• use advanced software features	Throughout workbook
• communicate effectively with personnel	23
• overcome problems by referring to user documentation, manuals and online help.	19–20

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:	Page reference
• outline various formatting styles and their impact on formatting, readability and appearance of documents	28–31
• explain organisational requirements for ergonomics, work periods and breaks, and conservation techniques	Software Publications WHS supplement
• describe purpose and contents of an organisational style guide	26–27
• identify purpose, uses and functions of word processing software.	36

Paragraph and line spacing defaults
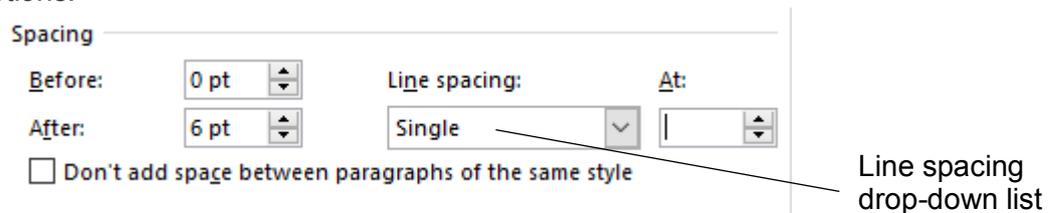
Line spacing

In Word 2016 the default spacing between lines of text is 1.08. This means there is a small space between each line. To apply a different line spacing, click on the Line and Paragraph Spacing button ⬍☰▾ and select the spacing required.
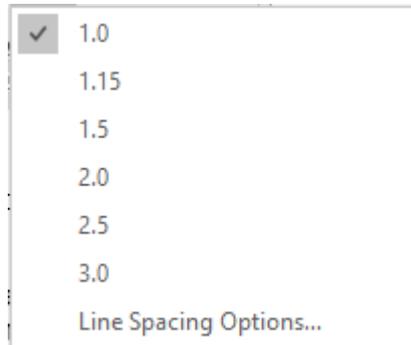
The Paragraph dialog box provides more options for line spacing. To display the dialog box, click on the Paragraph Group Dialog Box Launcher button ⬚ OR click on ⬍☰▾ and select Line Spacing Options.

Line spacing drop-down list

Options from the Line spacing drop-down list are:

Single	Single line spacing.
1.5 lines	Extra half line between lines.
Double	Extra line between lines.
At least	At least the amount of spacing specified in the *At:* box. Extra spacing will automatically be added for large characters, increased font size, etc.
Exactly	Exactly the amount of spacing specified in the *At:* box. Text may disappear if enough space isn't available with large font sizes.
Multiple	Allows line spacing to be increased or decreased by any percentage.

Exercise 4

1. Open Word.

2. Open the document **Managing a mortgage** in the *978-1-925291-20-9 BSBITU303 exercise files* folder. Enable editing if required.

3. Format the heading to centred, 22 pt.

The top of the heading has been cut off because the original document was typed using the Exactly 12 pt line spacing option.

4. Press Ctrl A to select the whole document. Check the Home Ribbon is displayed. Click on ⬍☰▾ from the Paragraph Group and select 1.0. The problem with the heading will be rectified.

5. Change the font size of the subheadings to 14 pt.

6. Save the file and keep it open for the next exercise.

Pagination

Controlling pagination

The Line and Page Breaks tab of the Paragraph dialog box allows you to control paragraph positioning on the page so a heading is kept with the following text or a table does not have a page break in the middle, etc.

Pagination instructions

1. Select the paragraph(s).

2. Right click and select Paragraph then select the Line and Page Breaks tab.
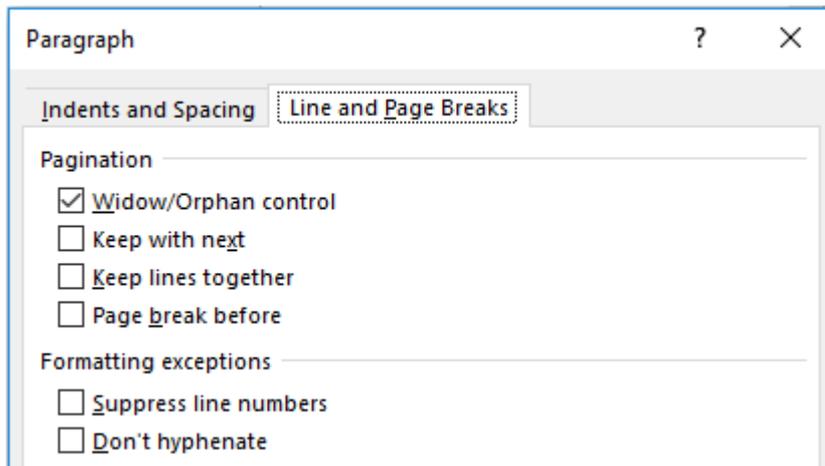
Widow/Orphan control	A widow is the first line of a paragraph that is left at the bottom of a page.
	An orphan is the last line of a paragraph that is carried to a new page.
	In Word, widow/orphan control is automatically turned on by default so a minimum of two lines of a paragraph will be at the top or bottom of a page.
Keep with next	Keeps the selected paragraph (which could be a heading) with the following paragraph so that both appear on the same page.
Keep lines together	Keeps the lines of the selected paragraph together so a page break does not occur in the middle of the paragraph.
Page break before	Inserts a page break before the selected paragraph to ensure the paragraph always appears at the top of a page.

3. Click on OK.

Exercise 19

1. Using **Italy**, check the Show/Hide formatting marks are displayed.

2. Delete the page break at the end of page 1 by clicking before ----------Page Break----------¶ and pressing Delete twice.

3. Click on ¶ to hide the formatting marks.

4. Select the paragraph which extends from the end of the second page to the top of the third page which begins: *If you have hired a car*.

5. Display the Paragraph dialog box and click on the Line and Page Breaks tab.

6. Put a tick in the *Keep lines together* check box ☑ Keep lines together.

Borders and shading

Borders can be applied to paragraphs, characters, words, pages and tables. By default borders are applied to a paragraph unless text is selected.

The Borders button ⊞ ▾ in the Paragraph Group on the Home Ribbon is used to add

borders. Click on the ▾ of this button to display the border options. Select the type of border required.

Each time a border is selected, the name of the button changes. For example, if you apply a Top Border then that will be the name of the button. (This button will sometimes be referred to as the Borders button in this workbook.)
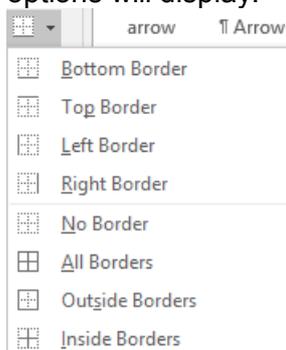
Note

Ctrl Q can be used to remove paragraph borders and lines but remember that this shortcut key will also remove all paragraph formats.

## Applying a border to a paragraph

Exercise 28

1. Open the file **Dewey Decimal System** in the *978-1-925291-20-9 BSBITU303 exercise files* folder.

2. Click anywhere in the first paragraph after the heading.

3. With the Home Ribbon displayed, click on the ▾ of the Borders button ⊞ ▾. The border options will display.

⊞ ▾	arrow	¶ Arrow
⊞	Bottom Border	
⊞	Top Border	
⊞	Left Border	
⊞	Right Border	
⊞	No Border	
⊞	All Borders	
⊞	Outside Borders	
⊞	Inside Borders	

4. Select ⊞ Outside Borders to add a border around the selected paragraph.

5. Click in the second paragraph.

6. Click on the Outside Borders button ⊞. Since Outside Border was the last option selected, this button will apply an outside border. Note that the border now extends around both paragraphs.

7. From the Borders button select ⊞ No Border to remove the borders from the paragraphs.

8. Leave the document open for the next exercise.

Printing styles
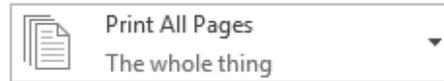
Style specifications can be printed by clicking on [Print All Pages / The whole thing ▼] and selecting Styles, List of styles used in document from the Print Backstage view
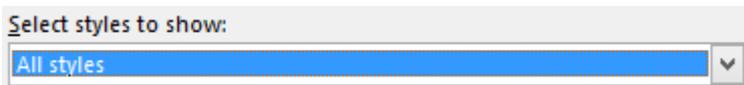
Styles
List of styles used in your document .

Applying styles

Exercise 39

1. Open the file called **Caffeine function** in the *978-1-925291-20-9 BSBITU303 exercise files* folder. Convert the document to Word 2016 format.

2. Click on the Styles Dialog Box Launcher button 🔲. The Styles Pane will display.

3. Click on Options... at the bottom of the Styles Pane.

4. Check All Styles is selected from the *Select styles to show:* list.

   Select styles to show:
   [All styles ▼]

5. Check the ☑ Show next heading when previous level is used check box has a tick in it.

6. Click on OK.

7. Click anywhere in the heading *The effects of caffeine on autonomic function*.

8. From the Styles box on the Home Ribbon, click on the Title style [AaB Title].

9. Click the cursor in the heading *Introduction* and select Heading 1 from the Styles gallery
   [AaBbC Heading 1].

10. Apply the Heading 1 style to the following headings (you can use F4 to repeat styles):

    Hypothesis
    Methods
    Autonomic function assessment:
    Measuring autonomic activity
    Dosage
    Controls
    Testing timeline
    Data analysis
    Results
    Discussion
    Conclusion
    References
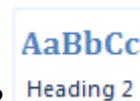
11. Click within the subheading *Subjects* (below *Methods*) and apply Heading 2 [AaBbCc Heading 2].
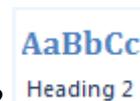
12. Apply Heading 2 to the text *This was done by measuring HR and BP* below *Measuring automatic activity*. (Do not forget you can use the Find tool to find the text.)

13. Select the subheading *Baseline results:* and apply Heading 3.

14. Save the file and leave it open for the next exercise.

Sections

A document can be divided into any number of sections and each section can be formatted differently. A section can be as short as a single paragraph or as long as an entire document. Each section ends with a section break.

When the Show/Hide button ¶ is on a section break is shown as a double line across the screen with the type of section break described.

<div align="center">=================================Section Break (Next Page)=================================</div>
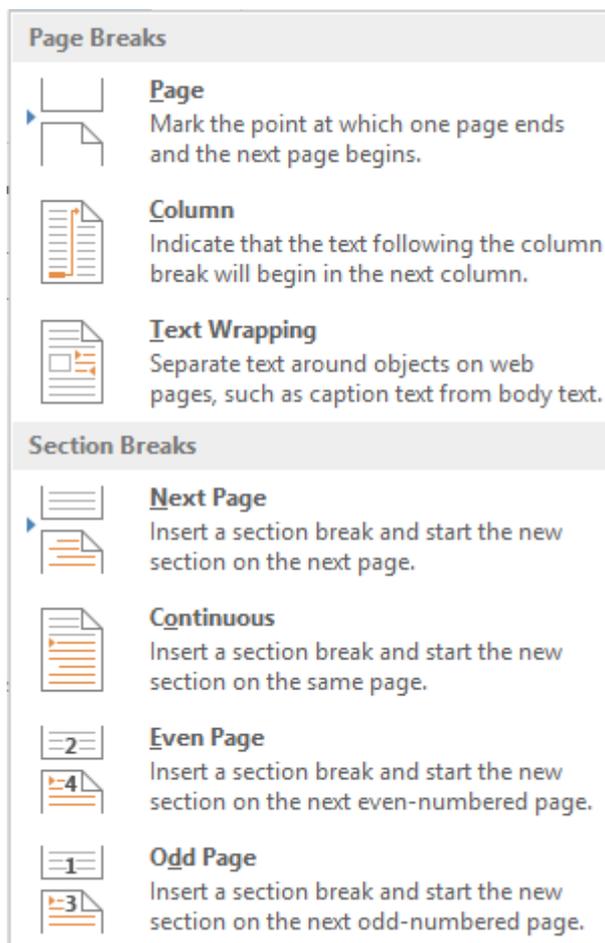
Word stores section formatting characteristics in the section break at the end of a section. If the section break is deleted the formats are deleted also.

A new section is created when you want to change the elements in part of a document, e.g.:

- different paper orientation
- different margins
- different vertical alignment
- text and formatting of headers and footers
- format, position and sequence of page numbers.

Section breaks are inserted from the Layout Ribbon.

1. With the Layout Ribbon displayed, click on [Breaks ▾]. The menu displays page and section breaks options.

2. Select the type of break required from the menu.

Page Breaks

Page
Mark the point at which one page ends and the next page begins.

Column
Indicate that the text following the column break will begin in the next column.

Text Wrapping
Separate text around objects on web pages, such as caption text from body text.

Section Breaks

Next Page
Insert a section break and start the new section on the next page.

Continuous
Insert a section break and start the new section on the same page.

Even Page
Insert a section break and start the new section on the next even-numbered page.

Odd Page
Insert a section break and start the new section on the next odd-numbered page.

Page Setup dialog box

Exercise 64

In this exercise you will type a two page letter. The first page will have an increased top margin setting to allow for a letterhead and the second page is used for information which will be vertically centred on the page.

1. In a new document, display the Layout Ribbon.

2. Click on the Page Setup Dialog Box Launcher button 🔲 and check the Margins tab is displayed.

Tip

You can double click on the shaded area at the left or right of the horizontal ruler to display the Page Setup dialog box.

3. Change margins to:

Margins			
Top:	7	Bottom:	2
Left:	3	Right:	3
Gutter:	0 cm	Gutter position:	Left

4. Notice in the *Apply to:* box that the margins will be changed for your Whole document.

Preview

Apply to: Whole document

5. Click on OK.

6. Use the Paragraph Spacing button on the Design Ribbon to remove all paragraph and line spacing from the document.

7. Save the document in your working folder with the file name **Farrow-Natures Choice**.

8. Type the letter on the following page, setting it out in a suitable letter format. Use Calibri 11 pt, justified.

Evidence guide

Elements and Performance Criteria

Element *Elements describe the essential outcomes.*	Performance Criteria *Performance criteria describe the performance needed to demonstrate achievement of the element.*	Assessment tasks
1. Prepare to produce word processed documents	1.1 Use safe work practices to ensure ergonomic, work organisation, energy and resource conservation requirements are met	Assessment task 1
	1.2 Identify document purpose, audience and presentation requirements, and clarify with relevant personnel as required	Assessment task 8
	1.3 Identify organisational and task requirements for text-based business documents to ensure consistency of style and image	Assessment task 8
2. Design word processed documents	2.1 Design document structure and layout to suit purpose, audience and information requirements of the task	Assessment tasks 5, 8 and 9
	2.2 Design document to enhance readability and appearance, and to meet organisational and task requirements for style and layout	Assessment tasks 5, 8 and 9
	2.3 Use style sheets and automatic functions to ensure consistency of design and layout	Assessment tasks 4, 5, 8 and 9
3. Add tables and other data	3.1 Insert a standard table into a document, changing cells to meet information requirements	Assessment tasks 7 and 10
	3.2 Insert and delete columns and rows as necessary	Assessment task 10
	3.3 Insert images and other data to meet required specifications	Assessment tasks 5, 9 and 10
4. Produce text documents	4.1 Use advanced software functions to enable efficient production of documents	Assessment tasks 5, 6 and 7
	4.2 Enter or import, and edit text and other data to meet required specifications	Assessment tasks 5, 8 and 10
	4.3 Preview, adjust and print documents in accordance with organisational and task requirements	Assessment tasks 5, 7, 9 and 10
	4.4 Name and store text documents, in accordance with organisational requirements and exit application without information loss/damage	Assessment tasks 5, 6, 7, 9 and 10
	4.5 Prepare text documents within designated timelines and organisational requirements for speed and accuracy	Assessment task 3
	4.6 Use manuals, user documentation and online help to overcome problems with document design and production	Assessment tasks 2 and 10

Assessment Requirements v1.0

Performance Evidence

Evidence of the ability to:	Assessment task

• adhere to organisational requirements and strategies when creating text documents including:
  • ergonomic requirements
  • energy and resource requirements
	Assessment task 1

• adhere closely to task requirements and required specifications by:
  • following designated timelines
  • achieving consistency of style and image
  • ensuring correct editing and style requirements
  • adhering to designated timelines
	Assessment tasks 3–10

• use advanced software features	Assessment tasks 4–7 and 9–10
• communicate effectively with personnel	Can be assessed through communication between candidate and assessor
• overcome problems by referring to user documentation, manuals and online help.	Assessment task 2

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:	Assessment task
• outline various formatting styles and their impact on formatting, readability and appearance of documents	Assessment tasks 5–10
• explain organisational requirements for ergonomics, work periods and breaks, and conservation techniques	Assessment task 1
• describe purpose and contents of an organisational style guide	Assessment tasks 3–10
• identify purpose, uses and functions of word processing software.	Assessment tasks 4–10