

## **Design and develop complex text documents (Word 2016)**

This workbook supports BSBITU401 Design and develop complex text documents in the BSB Business Services Training Package.

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Software Publications writing team

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# BSBITU401 Design and develop complex text documents

## Application

This unit describes the skills and knowledge required to design and develop business documents using complex technical features of word processing software.

It applies to individuals who work in a range of business environments and have skills which may be applied in the provision of administrative support within an enterprise, or by technical/knowledge experts responsible for producing their own word processed documents.

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 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	24–25, 65
	1.3 Identify organisational requirements for text-based business documents to ensure consistency of style and image	26–28, 31, 65
	1.4 Evaluate complex technical functions of software for its usefulness in fulfilling requirements of the task	Throughout workbook
	1.5 Match document requirements with software functions to provide efficient production of documents	Throughout workbook
2 Design complex documents	2.1 Design document structure and layout to suit purpose, audience and information requirements of task	24–25, 65
	2.2 Design document to enhance readability and appearance, and to meet organisational and task requirements for style and layout	26–31, 65
	2.3 Use complex software functions to enable efficient manipulation of information and other material, and ensure consistency of design and layout	Throughout workbook
	2.4 Use manuals, user documentation and online help to overcome problems with document design and production	19

<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 Add complex tables and other data	3.1 Insert a standard table into document, changing cells to meet information requirements	82–95
	3.2 Format rows and columns as required	82–95
	3.3 Insert images and other data, formatting as required	41–54, 5765, 118, 123, 237–238
4 Produce documents	4.1 Use complex operations to develop documents, and achieve required results	Throughout workbook
	4.2 Preview, adjust and print documents in accordance with organisational and task requirements	106–111, 115, 131, 153, 203
	4.3 Name and store documents in accordance with organisational requirements and exit application without information loss/damage	Throughout workbook
	4.4 Prepare documents within designated timelines and for speed and accuracy	18, 65, 102, 154, 208

## 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	1.3, 2.2, 2.4, 4.3, 4.4	<ul style="list-style-type: none"> <li>Recognises and interprets textual information from a range of resources to determine and confirm requirements and to assist with document issues</li> </ul>	Throughout workbook
Writing	2.1-2.4, 3.3, 4.2-4.4,	<ul style="list-style-type: none"> <li>Develops material using required format and incorporating technical functions to meet business needs</li> </ul>	Throughout workbook
Oral communication	1.2	<ul style="list-style-type: none"> <li>Uses specific and relevant language to confirm understanding of requirements and listens carefully to verbal instructions and discussions</li> </ul>	23–24, 31, 65
Numeracy	1.4, 3.3	<ul style="list-style-type: none"> <li>Recognises and inputs numerical information according to requirements</li> </ul>	97–101
Navigate the world of work	1.1-1.3, 1.5, 2.1-2.3, 3.1-3.3, 4.1-4.4	<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 and Software Publications WHS supplement
Interact with others	1.2	<ul style="list-style-type: none"> <li>Collaborates with others to achieve joint outcomes</li> </ul>	23–24, 31, 65, 124
Get the work done	1.4, 1.5, 2.1-2.4, 3.1-3.3, 4.1-4.4	<ul style="list-style-type: none"> <li>Applies formal processes when planning more complex/unfamiliar tasks, producing plans with logically sequenced steps</li> </ul>	18–19, 24–25, 65, 102–103
		<ul style="list-style-type: none"> <li>Uses advanced features within applications to access, store, organise data and perform routine and complex work tasks</li> </ul>	Throughout workbook

## Customised numbering

Multilevel numbering can be changed to suit your needs or the style guide of your workplace.




Options can also be changed before text is typed as well as by applying the changes to selected text.

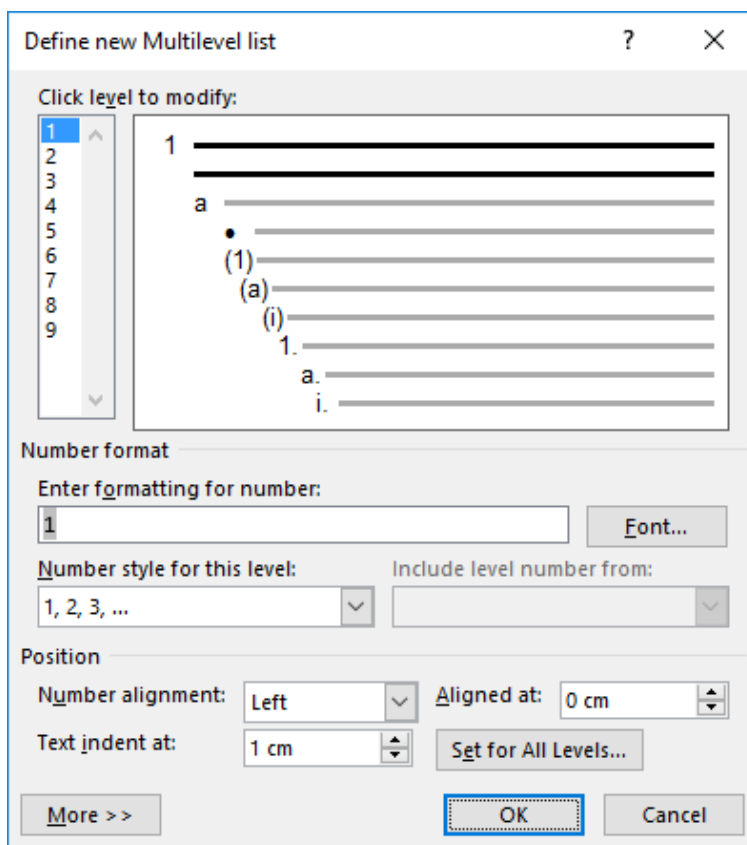
When options are changed **first** and then text is typed using multilevel numbering, the same keystrokes for promoting and demoting levels, skipping and stopping numbering apply.

### Exercise 38

1. Open the file called **Triathlon** from the 978-1-925291-29-2 BSBITU401 exercise files folder. The required result is shown on the next page.

First, you will indent text according to the levels that will be used by the multilevel list feature.

2. Select paragraphs shown with bullets and click on  twice.
3. Select paragraphs shown as a, b, c and d and click on  once.
4. Select from the beginning of *Swimming* to the end of the *Running* paragraph.
5. Click on  and select **Define New Multilevel List...**
6. Click at the right of 1) in the *Enter formatting for number:* box. Press the Backspace key to delete the bracket.



7. Change the *Text indent at:* measurements to **1 cm**.
8. Click on 2 in the *Click level to modify:* box at the top left of the dialog box.
9. Change the Level 2 option by deleting the bracket in the *Enter formatting for number:* box. In the Position section set *Aligned at:* to **1 cm** and *Text indent at:* to **2 cm**.
10. Click on 3 in the *Click level to modify:* box.

# Macros

A macro is a series of Word commands grouped together as a single command. Macros can include text but are mostly used for speedy selection of Ribbon options. A macro can be operated by using a name, can be assigned to a shortcut key or to a button on the Quick Access Toolbar.

Macro names cannot have spaces in them; an underscore can be used to separate words. Alternatively, Ctrl Shift Spacebar can be used to enter a hard space between words.

## Examples

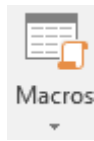
- Selecting A4 landscape paper size and changes margins.
- Setting a tab at the right margin with leader dots.
- Distributing all columns and rows evenly in a table.
- Skipping numbering and indenting.
- Assigning your preferences for outline numbering.

Macros cannot be used to create headers or footers in Word using the technique in Exercise 42; the macro would have to be coded.

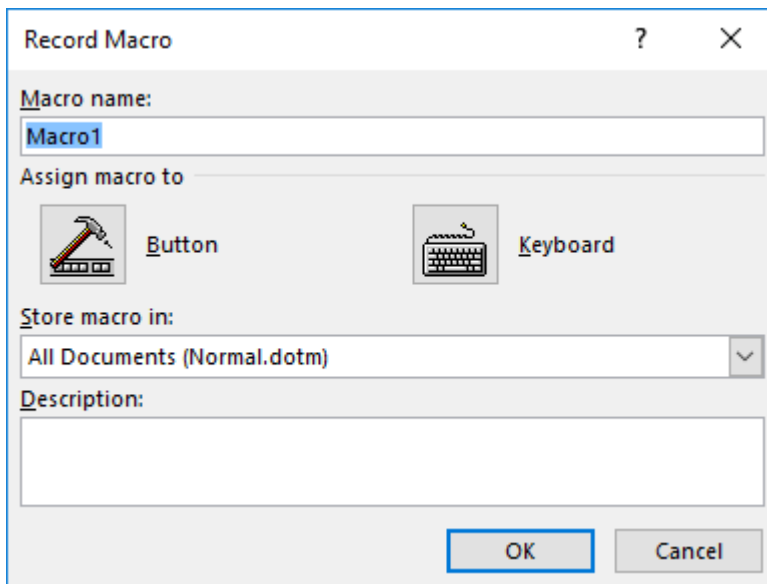
## Recording a macro

### Exercise 42

1. In a new document display the View Ribbon.



2. Click on the Macro button and select **Record Macro...**. The Record Macro dialog box will display.



3. With the text in the *Macro name:* box selected, type: **Page\_border**
4. Click in the *Description:* box and type: **Applies a 3/4 pt fine dotted page border to the whole document**



5. In the Assign macro to section click on the Keyboard button
6. In the Press new shortcut key: box press **Alt P**.

## Changing column widths/row heights

Position your mouse pointer on the column divider between columns then click and drag to the left or right.

	Brisbane
Airfares	595


To change row height, position the mouse pointer on the line of a row and drag downwards (or upwards).

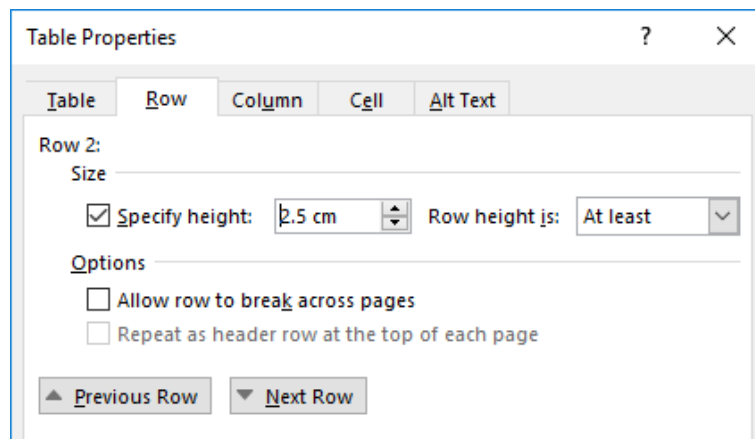
Alternatively, use the Table Row Height and Table Column Width tools in the Cell Size Group on the Table Tools Layout Ribbon.



## Table Properties dialog box

The Table Properties dialog box can also be used to change column widths and row heights.

1. Click within the column or width to be changed. With the Table Tools Layout Ribbon displayed, click on the Cell Size Group dialog box launcher .





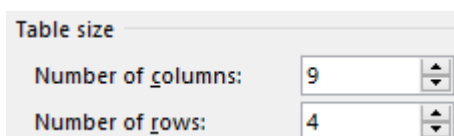
2. Select the Row or Column tab.
3. Enter the row height or column width required.

### Exercise 46

1. Create a new document and change the left and right margins to 1.5 cm.
2. Display the Insert Ribbon.



3. Click on  and select  Insert Table...
4. Set the Number of columns: to 9 and the Number of rows to 4.




5. Click on OK.
6. Select the table and change the font to Arial 9 pt.




## Table styles

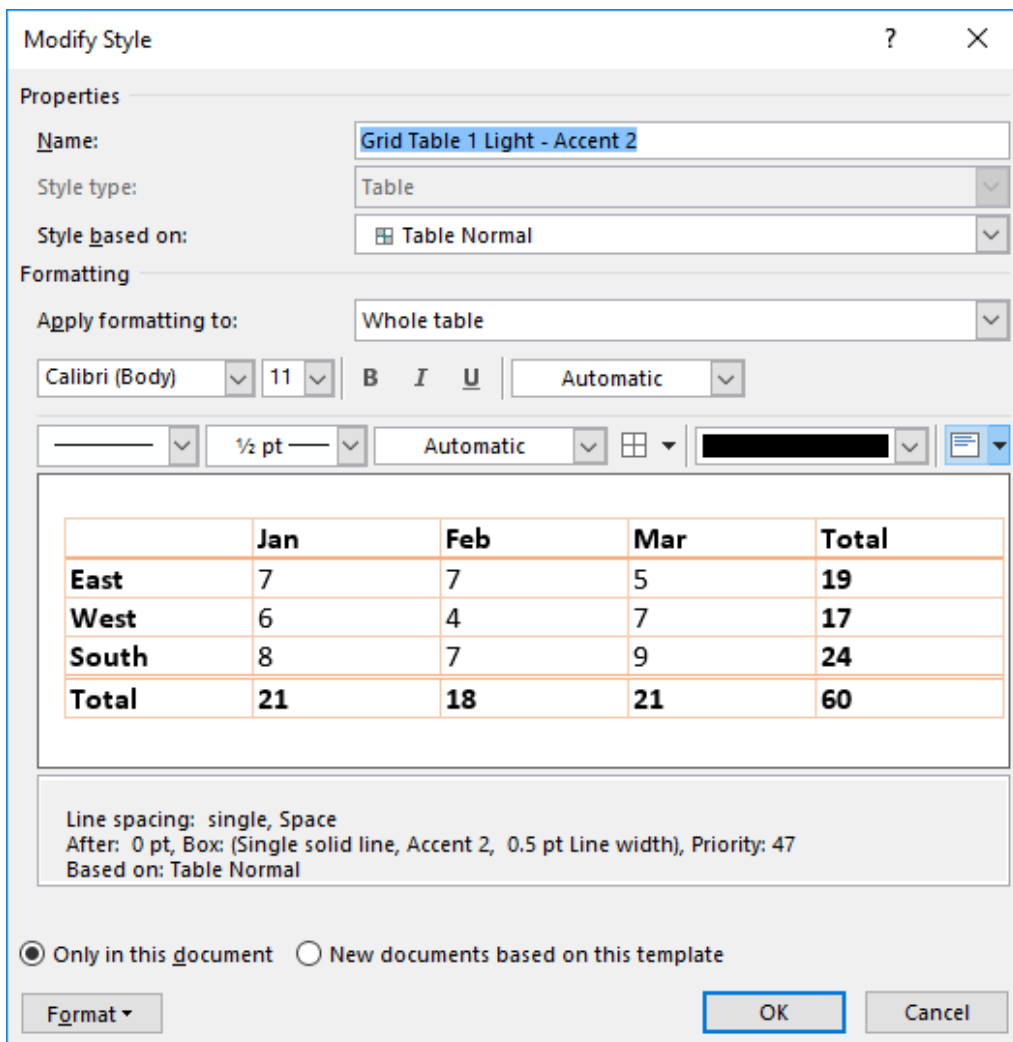
A table style is a group of formatting instructions applied to a table. The same style can be applied to varying table sizes to give a consistent appearance. When a table style is edited and updated the changes will be made to all tables with that style applied throughout the document.

### Exercise 53

1. Open the file called **Bookstore report** from the 978-1-925291-29-2 BSBITU401 exercise files folder.
2. Place the cursor in the table on page 2.
3. From the Table Tools Design Ribbon click on the More button  from the Table Styles Group. Position the mouse pointer over individual styles to preview the style applied to the table.



4. Select the Grid Table 1 Light - Accent 2 style . (Position the mouse pointer over the styles to display the names.)
5. Scroll to the table on page 3 and apply the same table style.
6. With the cursor still in the table on page 3, click on the More button  from the Table Styles Group. Select  **Modify Table Style...** to display the Modify Styles dialog box.



**Modify Style**

**Properties**

Name: **Grid Table 1 Light - Accent 2**

Style type: Table

Style based on: Table Normal

**Formatting**

Apply formatting to: Whole table

Calibri (Body) 11 B I U Automatic

½ pt Automatic

	Jan	Feb	Mar	Total
East	7	7	5	19
West	6	4	7	17
South	8	7	9	24
Total	21	18	21	60

Line spacing: single, Space  
After: 0 pt, Box: (Single solid line, Accent 2, 0.5 pt Line width), Priority: 47  
Based on: Table Normal

Only in this document  New documents based on this template

Format OK Cancel


The Formatting section is used to apply different formats to various parts of a table.

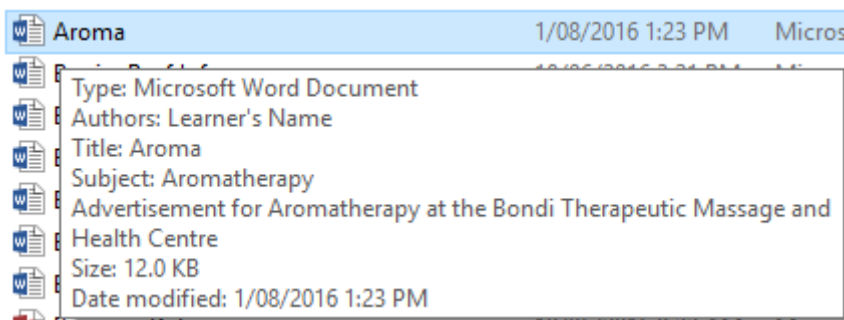


# Document properties

File properties are details such as the file name, author, size and keywords which describe the file's contents. Some of these properties can be amended.

## Exercise 62

1. Open the file called **Aroma** from the *978-1-925291-29-2 BSBITU401 exercise files* folder.
2. Click on **FILE** and check **Info** is selected.
3. In the Properties Pane click on **Show All Properties**.
4. Add information to the document Properties by clicking in each field and entering:  
*Tags:* Aromatherapy, Bondi, Health  
*Comments:* Advertisement for Aromatherapy at the Bondi Therapeutic Massage and Health Centre  
*Status:* Draft  
*Categories:* Advertisement  
*Subject:* Aromatherapy  
*Company:* Bondi Therapeutic Massage and Health Centre
5. To add your name as an author, click on **Add an author**. Type your name into the Add an author box and click on .
6. Right click on the previous author's name and select **Remove Person**.
7. Close the file saving changes.
8. Open File Explorer and navigate to the **Aroma** file.
9. Position your mouse cursor over the file name. Information entered into the Properties dialog box is displayed as shown below.



## Preview a file

Previewing a file displays the document as it will be printed before you print. Using preview before printing reduces paper wastage.

## Exercise 63


1. Open the file called **Computers** from the *978-1-925291-29-2 BSBITU401 exercise files* folder.

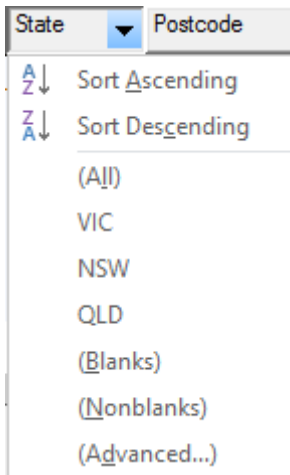
To preview a document as it will be printed you need to enter Backstage view.



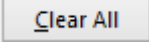
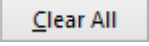
2. Click on **FILE** then select **Print**.

## Applying filters in the Mail Merge Recipients window

### Exercise 86

1. With the Mail Merge Recipients window displayed, click on the State . A menu will display:



2. Select NSW from the menu. This will display only those records with NSW in the State field.
3. Click on the State  and select (All). This will turn off the filter for the State field.
4. Filter the Rate field by 7. Click on the Payment column heading to sort ascending by Payment.
5. Remove the filter from the Rate field by selecting (All) from the filter list.
6. Perform the following:
  - a. Filter the Suburb field to display only Sydney. Remove the filter.
  - b. Filter the Date field to display 15 June 2015. Remove the filter.
  - c. Sort descending by the Payment field.
7. Click on the State field  and select (Advanced...). This will display the Filter and Sort dialog box. Within this dialog box more complex filters and sorts can be performed.
8. From the Filter Records tab click on the Clear All button . Click on the Sort Records tab and click on . Click on OK.
9. Click on OK to close the Mail Merge Recipients dialog box.
10. Leave the main document open for the next exercise.

# 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. Prepare to produce word processed documents	1.1 Use safe work practices to ensure ergonomic, work organisation, energy and resource conservation requirements are met	Task 1
	1.2 Identify document purpose, audience and presentation requirements, and clarify with relevant personnel as required	Task 3 Part A
	1.3 Identify organisational requirements for text-based business documents to ensure consistency of style and image	Task 3 Part A
	1.4 Evaluate complex technical functions of software for its usefulness in fulfilling requirements of the task	Task 3 Part B
	1.5 Match document requirements with software functions to provide efficient production of documents	Task 3 Parts A and B
2. Design complex documents	2.1 Design document structure and layout to suit purpose, audience and information requirements of task	Task 3 Parts A, C and D Task 4 Task 5 Task 6 Part A
	2.2 Design document to enhance readability and appearance, and to meet organisational and task requirements for style and layout	Task 3 Parts A, C and D Tasks 4 and 5 Task 6 Part A
	2.3 Use complex software functions to enable efficient manipulation of information and other material, and ensure consistency of design and layout	Task 3 Parts C and D Tasks 4 and 5 Task 6 Part A
	2.4 Use manuals, user documentation and online help to overcome problems with document design and production	Tasks 3–6
3. Add complex tables and other data	3.1 Insert a standard table into document, changing cells to meet information requirements	Task 6 Part A
	3.2 Format rows and columns as required	Task 6 Part A
	3.3 Insert images and other data, formatting as required	Task 3 Parts C and D Tasks 4 and 5
4. Produce documents	4.1 Use complex operations to develop documents, and achieve required results	Task 3 Parts C and D Tasks 4–6
	4.2 Preview, adjust and print documents in accordance with organisational and task requirements	Task 3 Parts C and D Tasks 4–6

<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>
	4.3 Name and store documents in accordance with organisational requirements and exit application without information loss/damage	Task 3 Parts C and D Tasks 4–6
	4.4 Prepare documents within designated timelines and for speed and accuracy	Task 2 Task 3 Parts C and D Tasks 4–6

## Assessment Requirements v1.0

### Performance Evidence

Evidence of the ability to:	Assessment task
<ul style="list-style-type: none"> <li>follow organisational and safe work practices including: <ul style="list-style-type: none"> <li>ergonomic requirements</li> <li>energy and resource conservation techniques</li> </ul> </li> </ul>	Task 1
<ul style="list-style-type: none"> <li>adhere to organisational requirements for: <ul style="list-style-type: none"> <li>producing documents within designated timelines</li> <li>naming and storing documents</li> </ul> </li> </ul>	Task 2 Task 3 Parts C and D Tasks 4–6
<ul style="list-style-type: none"> <li>adhere to task requirements when producing complex documents including: <ul style="list-style-type: none"> <li>using appropriate styles and layout consistently throughout the document</li> <li>using correct formatting and document structure</li> </ul> </li> </ul>	Task 3 Parts C and D Task 4 Task 5 Task 6 Parts A and B
<ul style="list-style-type: none"> <li>resolve issues by referring to user documentation and online help</li> </ul>	Tasks 3–6
<ul style="list-style-type: none"> <li>use appropriate data storage options</li> </ul>	Task 3 Parts C and D Tasks 4–6
<ul style="list-style-type: none"> <li>apply knowledge of complex operation and functions of industry software applications</li> </ul>	Task 3 Parts B–D Tasks 4–6
<ul style="list-style-type: none"> <li>communicate with relevant personal.</li> </ul>	Task 3 Part A

### Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:	Assessment task
<ul style="list-style-type: none"> <li>outline various formatting styles and their effect on formatting, readability and appearance of documents</li> </ul>	Task 3 Parts A, C and D Task 4 and 5 Task 6 Part A
<ul style="list-style-type: none"> <li>explain organisational requirements for ergonomics, work periods and breaks, and conservation techniques</li> </ul>	Task 1
<ul style="list-style-type: none"> <li>describe purpose and contents of an organisational style guide.</li> </ul>	Task 3 Parts A, C and D Tasks 4 and 5 Task 6 Part A