

Design and produce business documents

This workbook supports BSBTEC301 Design and produce business documents in the BSB Business Services Training Package.

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BSBTEC301 Design and produce business documents

Application

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

The unit applies those who possess fundamental skills in computer operations. 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

Element <i>Elements describe the essential outcomes.</i>	Performance Criteria <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>	Page reference
1. Select and prepare resources	1.1 Select and use technology and software applications to produce required business documents	16–17
	1.2 Select layout and style of publication according to information and organisational requirements	55–65
	1.3 Use basic design principles and ensure document design is consistent with organisational requirements	10, 51–65
	1.4 Discuss and clarify format and style with required stakeholders	10, 69
2. Design document	2.1 Identify, open and create files according to task and organisational requirements	21–23, 34
	2.2 Design document and ensure efficient entry of information	55–65, 66–70, 119–121, 135–140
	2.3 Use a range of functions to ensure consistency of design and layout	82–89, 135–140, 142–144
3. Produce document	3.1 Complete document production according to organisational policies, procedures and requirements	Throughout workbook
	3.2 Check document produced to ensure it meets task requirements for style and layout	66–69
	3.3 Store document appropriately and save document	12, 21–23
	3.4 Use help function to overcome basic difficulties with document design and production, where required	46

Element <i>Elements describe the essential outcomes.</i>	Performance Criteria <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>	Page reference
4. Finalise document	4.1 Proofread document for readability, accuracy and consistency of language, style and layout prior to final output	66–69
	4.2 Modify document according to task requirements	26–29, 66–72, 77
	4.3 Name and store document in accordance with organisational requirements and exit application	12, 21–23, 29
	4.4 Present document according to task requirements	76–77

Foundation Skills

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

Skill	Description	Page reference
Reading	<ul style="list-style-type: none"> Recognises and interprets textual information from a range of sources to determine and adhere to requirements 	Throughout workbook
Writing	<ul style="list-style-type: none"> Develops documents using required format, accurate spelling and grammar and terminology specific to requirements 	55–72
	<ul style="list-style-type: none"> Organises content to support purposes and audience of material, using clear and logical language 	9–10
Self-management	<ul style="list-style-type: none"> Recognises and follows explicit and implicit protocols and meets expectations associated with own role 	Throughout workbook

Assessment for this Unit

This Unit is assessed by creating a:

- creating a letterhead template
- creating a letter incorporating data from another Word document
- creating a leaflet
- using Help
- creating a memo incorporating data from a spreadsheet
- creating a report.

Assessment Requirements

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- design, produce and finalise four different types of business documents, using at least two different software applications.

In the course of the above, the candidate must:	Page reference
<ul style="list-style-type: none">• comply with organisational policies and procedures for producing business documents	10–13
<ul style="list-style-type: none">• adhere to task requirements when producing documents including:<ul style="list-style-type: none">• applying basic design principles	51–54
<ul style="list-style-type: none">• applying consistent formatting	10–11, 83–89, 135–140, 142–144
<ul style="list-style-type: none">• using appropriate style	10–11, 83–89
<ul style="list-style-type: none">• using correct layouts	55–65
<ul style="list-style-type: none">• proofreading	66–69
<ul style="list-style-type: none">• use required data storage options.	21–23

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:	Page reference
<ul style="list-style-type: none">• technology required for document production	16–17
<ul style="list-style-type: none">• key functions and features of contemporary computer applications	16
<ul style="list-style-type: none">• organisational policies and procedures	10–12
<ul style="list-style-type: none">• organisational requirements for document design, including style guide.	10–11

Word default style guide

Layout

Page size	Set to the Australia standard A4 (the USA standard page size is called Letter)
Margins	2.54 cm – the metric equivalent of 1 inch

Text styles

Body text (Normal style)	Calibri, 11 pt, black, left aligned text, 8 pt spacing after each paragraph
Heading 1 style – for document headings	Calibri Light, 16 pt, blue, 12 pt paragraph spacing above
Heading 2 style	Calibri Light, 13 pt, blue, 2 pt paragraph spacing above
Heading 3 style	Calibri Light, 12 pt, blue, 2 pt paragraph spacing above
Bulleted paragraphs	Black circle bullet indented 0.63 cm from the left margin with text indented 0.63 cm from the bullet
Numbered paragraphs	Arabic number followed by a full stop at left margin
Header/footer text	Calibri, 11 pt, black

The default settings for Word may have been altered on your device in your training organisation. In this case use your training organisation's default settings when completing exercises.

Conventions for personal names

In most western cultures a person has a first name followed by a last, family name; however in some eastern cultures the order is reversed. When you encounter a name from a culture you are not familiar with, you may not be able to determine which is which.

Depending on the organisation and the age of its data, you are likely to come across different generations of personal name terminology.

When creating documents, current conventions should be applied.


Current convention	Previous terms
Given name	First name Christian name Forename
Family name	Last name Surname Byname

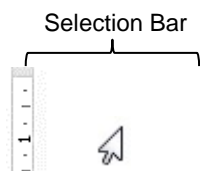
Group discussion

If you are learning in a classroom environment, share your name with your fellow learners (write it on a whiteboard if available) and discuss the personal naming conventions of your culture.

Selecting text

Selecting text (also called highlighting) is used to define text that you wish to do something to – delete, move, copy, change the font, size, etc. The most commonly used method of selecting text is to hold down the left mouse button and drag across and/or down the text.

When the insertion point is moved into the Selection Bar area on the left of your document it will display as a right-pointing arrow . By dragging up or down in this area you can select lines of text quickly.



The area to the left of your text is called the Selection Bar. When you move your mouse into the Selection Bar it changes to a mouse pointer. Quick selection movements can be made using the Selection Bar by simply clicking and dragging.

Text can also be selected by using the methods described below.



Selecting text using the mouse

A character	Click and drag across a character.
A word	Double click in a word.
A sentence	Ctrl click anywhere in a sentence.
A line	Move the mouse pointer into the Selection Bar and click.
A paragraph	Move the mouse pointer into the Selection Bar. Point to the paragraph and double click. OR Triple click in the actual paragraph.
To select text between two points	Click at the beginning of the text to be selected. Move the insertion point to the end of the text. Hold down the Shift key and click.
Random selections	Hold down the Ctrl key and select each group of text.
To select the whole document	Press Ctrl A. OR Triple click in the Selection Bar.

If text is selected and you press a key on the keyboard the text will be overwritten or deleted.

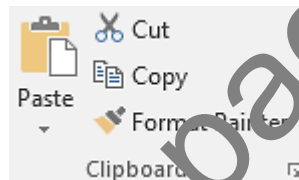
Basic text editing summary




Editing feature	Procedure
Insert content	Inserting is automatic. Click the insertion point to insert text and just type the text to be inserted.
New paragraph	Place the cursor on the left of the first character of the intended new paragraph and press Enter. Word default paragraph spacing automatically inserts an 8 pt space.
Join paragraphs	Place the cursor at the end of the first paragraph and press Delete. OR Place the cursor at the beginning of the second paragraph and press Backspace. Press Spacebar once.

Editing feature	Procedure
Delete to right of cursor	Press the Delete key.
Delete to left of cursor	Press the Backspace key.
Delete a blank line	Place the cursor on the blank line and press Delete.
Insert a blank line	Place the cursor below the line to be inserted and press Enter.
Undo last action(s)	Click on the Undo button  or use the keyboard shortcut Ctrl Z.
Redo last undo	Click on the Redo button  to redo the last undo OR use the keyboard shortcut Ctrl Y.
Typing replaces selection	Select text and type new text.

Moving and copying text

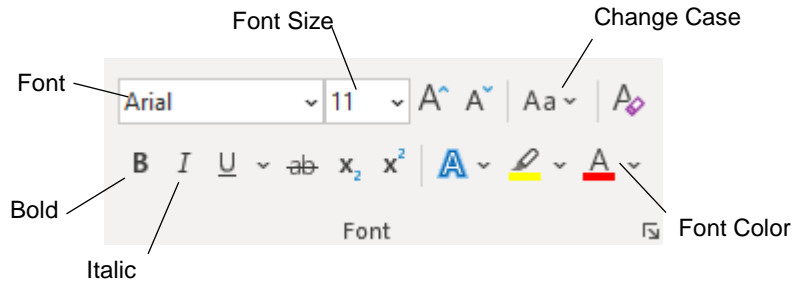
Text and other elements of a document can be cut (moved) or copied to the Clipboard and pasted to another location, document or app. The Clipboard Group on the Home Ribbon contains the controls used for moving and copying.



Moving	<ol style="list-style-type: none"> 1. Select the text to be moved. 2. Click on the Cut button  OR use the keyboard shortcut Ctrl X. 3. Move the cursor to where you wish to move the text. 4. Click on the Paste button  OR use the keyboard shortcut Ctrl V.
Copying	<ol style="list-style-type: none"> 1. Select the text to be copied. 2. Click on the Copy button  OR use the keyboard shortcut Ctrl C. 3. Move the cursor to where you wish to copy the text. 4. Click on the Paste button OR use the keyboard shortcut Ctrl V.

Formatting text

The Font Group on the Home Ribbon provides tools for formatting text.



Font sizes

Fonts are measured in **points (pt)**. There are 72 points to 2.54 cm.

Font half sizes

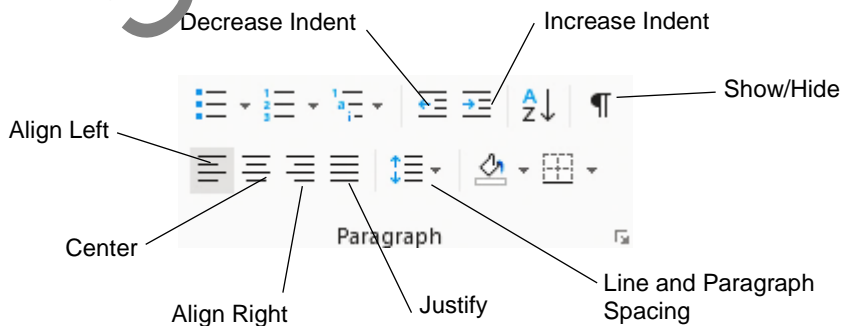
Font half sizes such as 11.5 pt can be typed into the Font Size box.

Exercise 2

1. Using **Exercise 1...** select the *Many types* subheading.
2. With the Home Ribbon displayed click in the Font Size box to select the number displayed .
3. Type: **15.5** and press Enter.
4. Use the function key F4 to apply the same formatting to the second subheading *Using a broker*.
F4 is a shortcut key for repeat.
5. Save the file and leave it open for the next exercise.

Formatting paragraphs

The Paragraph Group on the Home Ribbon contains tools for formatting paragraphs.

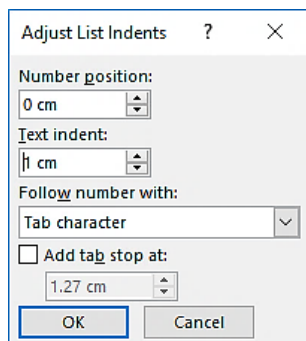


Indenting numbered paragraphs

1. Select the numbered paragraphs and click the right mouse button.
2. Select Adjust List Indents.



The *Number position* is the position of the number relative to the left margin.

The *Text indent* is the position of the text relative to the left margin.



3. Click on OK.

This technique will not work if you have skipped numbers for some paragraphs or if you have blank lines between numbers.

If you need to change the indent of a numbered list which contains blank lines, use the Increase  and Decrease  Indent buttons on the Home Ribbon.

Exercise 11

Ctrl N



1. Create a new document and remove line spacing and paragraph spacing.
2. Set the font to Calibri 12 pt.
3. Type the heading shown below and format appropriately.

NEWVIEW NETWORK TELEVISION

Each NEWVIEW channel is individually dedicated to bringing you the world's best in news, movies and sport.

1. The NEWVIEW News Channel brings you 24 hours of national and international news and information from the BBC and the legendary CNN.
2. The NEWVIEW Movie Channel, presented by HBO (Home Box Office – the world's greatest movie channel), screens the best movies available, 100 per cent commercial free.
3. The NEWVIEW Sports Channel presents 24 hours of national and international sport – most of it live and exclusive to NEWVIEW.

Our monthly magazine NEWVIEWS contains all the information you'll need. It is designed to maximise your subscription to NEWVIEW television.

4. Type the first paragraph and press Enter.
5. Click on  to insert the first number. It will be indented automatically.
6. Type the first numbered paragraph shown below.
7. Press Enter to insert the second number.
8. Continue in this way down to the last numbered paragraph.
9. Press Enter after the third numbered paragraph then click on  to turn off numbering.
10. Type the last paragraph.

Document design concepts

Balance

Balance is about arranging the content of a document so that it looks tidy, inviting and is easy to read.

White space is the area of the document without content. Good white space usage includes ensuring there is enough space between paragraphs and above headings. Even margins provide an equal amount of white space around the text.

On the Insert tab, the galleries include items that are designed to coordinate with the overall look of your document. You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. When you create pictures, charts, or diagrams, they also coordinate with your current document look.

You can easily change the formatting of selected text in the document text by choosing a look for the selected text from the Styles gallery on the Home tab. You can also format text directly by using the other controls on the Home tab. Most controls offer a choice of using the look from the current theme or using a format that you specify directly.

Unbalanced

On the Insert tab, the galleries include items that are designed to coordinate with the overall look of your document. You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. When you create pictures, charts, or diagrams, they also coordinate with your current document look.

You can easily change the formatting of selected text in the document text by choosing a look for the selected text from the Styles gallery on the Home tab. You can also format text directly by using the other controls on the Home tab. Most controls offer a choice of using the look from the current theme or using a format that you specify directly.

Balanced

If your document contains images, check the image size and the text arrangement complement each other. Do not let a small image be swallowed up by lots of text, but also check a large dominant image does not overpower the text.

Simplicity



The concept of simplicity is about presenting information in a way that can be understood easily. It is particularly important business documents are set out with the concept of simplicity in mind. The layout should be tidy with appropriate use of white space making it easy to view and read.

- Do not cram a lot of information into one small section – spread it out over the page or pages.
- Do not use too many colours or too many different text types as this can make the document difficult to read.
- Do not try and crowd too many images onto a page.
- Do not make the mistake of thinking simplicity equals boring.
- It is possible to introduce interest to your document with the judicious use of colours and images as long as they are appropriate.



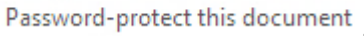
Protecting documents with a password

Passwords can be used to prevent others from opening a file. Passwords are case sensitive, If you protect a file with a password, you must provide the password each time you open the document, typing uppercase and lowercase letters **exactly** as you did when you specified the password.

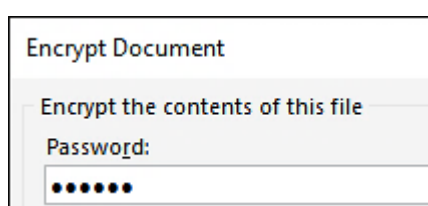
Exercise 27


1. Using **Exercise 26...** click on  and check  is selected.



2. Click on  and select  **Encrypt with Password** .

3. In the *Password:* box, type a password of your choice. The password will appear as bullets as shown below.





4. Click on OK.
5. Retype the password to verify it and then click on OK.
6. Click on  to return to the document.
7. Save and close the document.
8. Open the document.
9. Enter your password and click on OK.
10. Leave the document open for the next exercise.

Removing encryption

Exercise 28

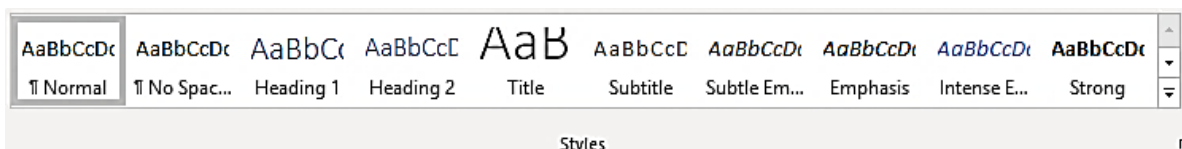


1. Using **Exercise 26...** click on , click on  and select Encrypt with Password.
2. Delete the bullets from the *Password:* box.
3. Click on OK.
4. Save the document and leave it open for the next exercise.

Styles

A style is a set of formatting instructions combined into a meaningful name that can be applied easily to text, e.g. Heading 1 style could be formatted as Arial 14 pt, left aligned, bold. Styles provide consistency to your work and when a style is edited, all occurrences of that style will change throughout the document.

Styles can be applied and edited using the Styles Group on the Home Ribbon. This is referred to as the Styles Gallery:



Clicking on the More button  displays more styles in the Styles Gallery.

New styles can be created to incorporate any formatting. Styles can also be used to generate a table of contents.

Heading 1 style — Growing beautiful roses

Heading 2 style — General information

Normal style — No other plant provides so many delightful flowers over such a long season as roses. Their variety forms from old-fashioned types, modern hybrids, miniatures, bush, standard and climbers give roses a multitude of uses and a place in every garden. Roses are hardy plants and they will even survive neglect; however, care and attention will result in improved plant vigour, size and quality of blooms and a very satisfying reward.

Heading 2 style — Soil

Normal style — Roses prefer a soil which has a good water holding capacity but is never waterlogged. A clay loam is ideal, but roses will grow in most soils. Improve light soils by digging in plenty of compost and prepare the ground by deep digging prior to planting. If drainage is a problem, try raised beds (at least 30 cm above ground level).

The document above shows the styles from the Word default style guide. The styles are formatted as:

Heading 1	Calibri Light, 16 pt, blue, 12 pt spacing before
Heading 2	Calibri Light, 13 pt, blue, 2 pt spacing before
Normal	Calibri, 11 pt, left aligned, black, 1.08 line spacing, 8 pt spacing after

Shortcut keys

The following shortcut keys can be used to apply styles:

Heading 1	Alt Ctrl 1
Heading 2	Alt Ctrl 2
Heading 3	Alt Ctrl 3
Normal	Ctrl Shift N

Applying organisational style guides

Applying and editing styles are an efficient way of setting text attributes to follow an organisational style guide. The following style guide will be used for Exercise 32 to Exercise 37.

Style	Description
Normal (main text)	Calibri, 11 pt, 6 pt spacing after
Heading 1	Arial, 18 pt, bold, 8 pt spacing after
Heading 2	Arial, 14 pt, bold, 6 pt spacing after
References	Calibri, 11 pt, 1.27 cm hanging indent
Report Title 1	Calibri, 24 pt, centred, double-bottom border
Emphasis	Calibri, 11 pt, bold, italic
Small Caps	Calibri, 11 pt, bold, italic, small caps

Editing styles


Editing existing styles provides a fast method of keeping a document consistent.

Style by example

Exercise 32

1. Use the Save As function to save a copy of **Exercise 31...** with the file name **Exercise 32...**
2. Press Ctrl Home and select the heading *Introduction*.
3. Press Ctrl Shift F to open the Font dialog box. Format the heading to Arial 18 pt, Bold, Automatic Font color.
4. Click on OK.
5. Display the Paragraph dialog box. Set paragraph spacing to 0 pt spacing before and 8 pt spacing after. Click on OK.
6. Right click on Heading 1 in either the Styles Gallery or the Styles pane.
7. Select Update Heading 1 to Match Selection.

Update Heading 1 to Match Selection

 Modify...

Select All 13 Instance(s)

All text formatted to Heading 1 will update with the new look.

8. Select the text *Subjects* and format to Arial 14 pt, bold, automatic font colour. 0 pt spacing before and 6 pt spacing after.
9. Right click on Heading 2 in Styles Gallery or the Styles pane and update all text formatted to Heading 2.
10. Deselect all text.
11. Save the document and leave it open for the next exercise.

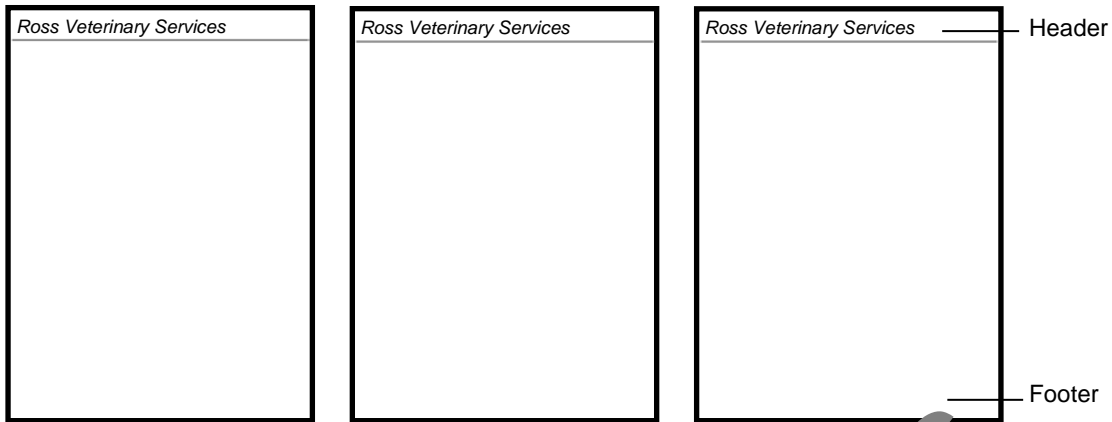
Ctrl Shift
F

Headers and footers

A header is the content that is repeated on the top of every page.

A footer is the content that is repeated on the bottom of every page.

Content could include images, text, page numbers and dates.



The Header & Footer Group on the Insert Ribbon is used to create and edit headers and footers.




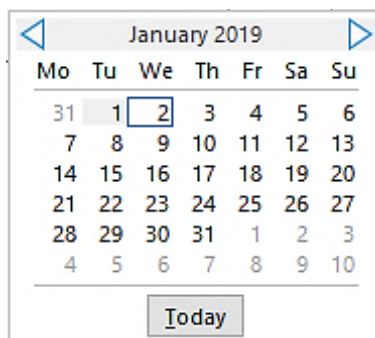
Word provides built-in headers and footers or they can be created from scratch. When editing the header or footer, the following tab will be added to the Ribbon.



Built-in headers and footers

To insert a built-in header or footer:

1. Click on the Header or Footer button to display the Built-in list.
2. Select the header/footer style required. The header or footer will open ready for editing.
3. The header/footer contains a series of fields, e.g. [Type here]. Click on a field and enter the data required.
4. In the case of a date field click on an  to display a calendar and select the date.




Integrating Excel data into Word


Documents often include data from other apps. Numerical data, charts and presentation slides are just some of the content that can be inserted into in a Word document.

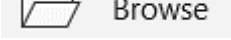
Starting Excel and opening a spreadsheet

Exercise 78

1. With Word still open click on the Start button .

2. Click on  to open Excel.

3. Click on .

4. Click on  to display the Open dialog box.

5. Navigate to the *978-1-921971-57-0 BSBTEC301 exercise files* folder.

6. Select the file called **Care Cosmetics November** and click on .

7. Leave the file open for the next exercise.

Switching between windows

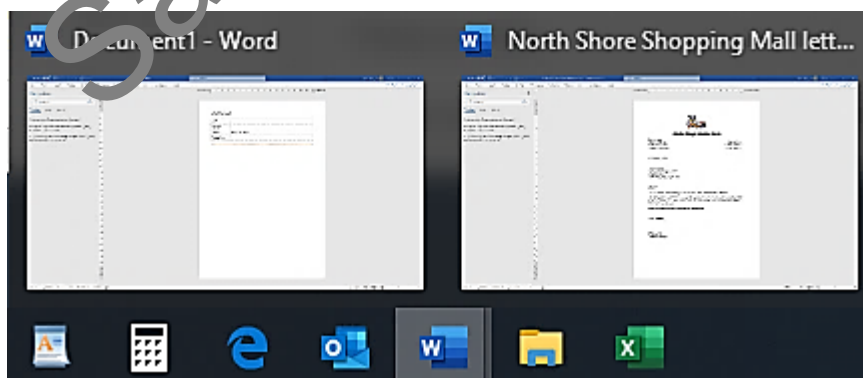
When working with multiple apps, you need to be able to switch between them.

Using the Taskbar

Buttons can be added to the Taskbar for commonly used apps.

- When an app is open, a bar is displayed below the button.
- When multiple instances of the app are open, the button has shading added.

To switch to the required window click on the Taskbar button. If multiple instances are open, clicking on the button will display a preview of each instance. Click on the one required.



Evidence guide

Elements and performance criteria

Element <i>Elements describe the essential outcomes.</i>	Performance Criteria <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>	Assessment tasks
1. Select and prepare resources	1.1 Select and use technology and software applications to produce required business documents	Task 1, Task 2, Task 3, Task 4, Task 5
	1.2 Select layout and style of publication according to information and organisational requirements	Task 1, Task 2, Task 3, Task 4, Task 5
	1.3 Use basic design principles and ensure document design is consistent with organisational requirements	Task 1, Task 2, Task 3, Task 4, Task 5
	1.4 Discuss and clarify format and style with required stakeholder	Task 3
2. Design document	2.1 Identify, open and create files according to task and organisational requirements	Task 1, Task 2, Task 3, Task 4, Task 5
	2.2 Design document and ensure efficient entry of information	Task 1
	2.3 Use a range of functions to ensure consistency of design and layout	Task 1, Task 2, Task 3, Task 4, Task 5
3. Produce document	3.1 Complete document production according to organisational policies, procedures and requirements	Task 1, Task 2, Task 3, Task 4, Task 5
	3.2 Check document produced to ensure it meets task requirements for style and layout	Task 2, Task 3, Task 4, Task 5
	3.3 Store document appropriately and save document	Task 1, Task 2, Task 3, Task 4, Task 5
	3.4 Use help function to overcome basic difficulties with document design and production, where required	Task 4
4. Finalise document	4.1 Proofread document for readability, accuracy and consistency of language, style and layout prior to final output	Task 2, Task 3, Task 5
	4.2 Modify document according to task requirements	Task 2, Task 3, Task 4, Task 5
	4.3 Name and store document in accordance with organisational requirements and exit application	Task 1, Task 2, Task 3, Task 4, Task 5
	4.4 Present document according to task requirements	Task 2, Task 3, Task 4, Task 5

Assessment Requirements

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- design, produce and finalise four different types of business documents, using at least two different software applications.

In the course of the above, the candidate must:	Assessments tasks
<ul style="list-style-type: none"> • comply with organisational policies and procedures for producing business documents 	Task 1, Task 2, Task 3, Task 4, Task 5
<ul style="list-style-type: none"> • adhere to task requirements when producing documents including: <ul style="list-style-type: none"> • applying basic design principles • applying consistent formatting • using appropriate styles • using correct layouts • proofreading 	Task 1, Task 2, Task 3, Task 4, Task 5
<ul style="list-style-type: none"> • use required data storage options 	Task 1, Task 2, Task 3, Task 4, Task 5

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:	Assessment tasks
<ul style="list-style-type: none"> • technology required for document production 	Task 1, Task 2, Task 3, Task 4, Task 5
<ul style="list-style-type: none"> • key functions and features of contemporary computer applications 	Task 1, Task 2, Task 3, Task 4, Task 5
<ul style="list-style-type: none"> • organisational policies and procedures 	Task 1, Task 2, Task 3, Task 4, Task 5
<ul style="list-style-type: none"> • organisational requirements for document design, including style guide. 	Task 1, Task 2, Task 3, Task 4, Task 5