

Design and Develop Complex Text Documents (Word 2013)

This workbook supports BSBITU401A Design and develop complex text documents in the BSB07 Business Services Training Package.

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Software Publications writing team

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BSBITU401A Design and develop complex text documents

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

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

Application of the unit This unit applies to individuals who work in a range of business environments and are skilled in the creation of complex documents using word processing software. These skills 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.

Employability skills This unit contains employability skills.

Prerequisites There are no prerequisites for this unit.

Element	Performance Criteria	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 addressed	Software Publications WHS <i>Included with downloaded exercise files</i>
1.2	Identify document purpose, audience and presentation requirements, and clarify with relevant personnel as required	6–9, 11, 13, 78, 80–88, 90–120, 124–140, 154–165, 176, 188, 203–214, 223
1.3	Identify organisational requirements for text-based business documents to ensure consistency of style and image	xvi, xviii–xx, xxii
1.4	Evaluate complex technical functions of the software for their usefulness in fulfilling the 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 the task	Throughout workbook
2.2	Design document to enhance readability and appearance, and to meet organisational and task requirements for style and layout	
2.3	Use complex software functions to enable efficient manipulation of information and other material, and ensure consistency of design and layout	Throughout workbook

Element	Performance Criteria	Page Reference
2.4	Use manuals, user documentation and online help to overcome problems with document design and production	xv
3 Add complex tables and other data		
3.1	Insert a standard table into document, changing cells to meet information requirements	46–65
3.2	Format rows and columns as required	
3.3	Insert images and other data, formatting as required	6–10, 30, 32, 46–65, 80–88, 111–114
4 Produce documents		
4.1	Use complex operations in the development of documents, to achieve required results	Throughout workbook
4.2	Preview, adjust and print documents in accordance with organisational and task requirements	69–73, 77, 97, 176
4.3	Name and store documents in accordance with organisational requirements and exit the application without information loss/damage	v–xiv
4.4	Prepare documents within designated time lines and organisational requirements for speed and accuracy	x

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to clarify requirements of documents
- keyboarding skills to enter text and numerical data
- literacy skills to edit and proofread documents, creating documents with a complex, organised structure of linked paragraphs which use simple and complex syntactic structure
- numeracy skills to collate and present data, graphs and annotated references
- problem-solving skills to use processes flexibly and interchangeably.

Required knowledge

- formatting styles and their effect on formatting, readability and appearance of documents
- organisational requirements for ergonomics, work periods and breaks, and conservation techniques
- organisational style guide.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Variable	Scope	Pages
Ergonomic requirements may include:	avoiding radiation from computer screens	Software Publications WHS <i>Included with downloaded exercise files</i>
	chair height, seat and back adjustment	
	document holder	
	footrest	
	keyboard and mouse position	
	lighting	
	noise minimisation	
	posture	
	screen position	
	workstation height and layout	
	equipment that is reasonably adjusted to meet personal needs, in appropriate circumstances	
Work organisation requirements may include:	exercise breaks	
	mix of repetitive and other activities	
	rest periods	
Energy and resource conservation requirements may include:	double-sided paper use	
	recycling used and shredded paper	
	re-using paper for rough drafts (observing confidentiality requirements)	
	using power-save options for equipment	
Complex documents may include:	call outs	13
	captions	176
	concordance files	188
	different odd and even pages	158
	document protection	136, 223
	drawing	13
	forms with fields	133–137
	hyperlinks	78
	linked and/or embedded objects	80–88, 111–114
	long documents	203–214
	mail merge data documents	90–110, 114–120
	master documents	209–214
	MS WordArt	13
	multiple headers and footers	154–163
	multiple sections	155–165
	multiple users	13
primary mail merge documents	90–110, 114–120	
subdocuments	209–214	
templates	124–140	
Organisational requirements may include:	company colour scheme	xx
	company logo	xix
	consistent corporate image	xix, xxii
	content restrictions	n/a

Variable	Scope	Pages
	established guidelines and procedures for document production	xviii–xx
	house styles	xviii–xx
	observing copyright legislation	xvi
	organisation name, time, date, document title, filename, etc. in header/footer	xviii
	templates	xix
Complex technical functions may include:	alignment	Throughout workbook
	data transfer	80–88, 111–114
	display features	n/a
	embedding	83, 86–88
	exporting	n/a
	fields	60–62, 75–77, 133–137
	form fields	133–137
	formulae	58–65
	importing	80–88, 111–114
	index	188–196
	linking	80–88, 111–114
	macros	42–45, 133–136
	merge criteria	106–110
	page and section breaks	Throughout workbook
	sort criteria	59, 100–102
	style sheets	n/a
table of contents	170–175	
templates	124–140	
Design choices may include:	balance	xxi–xxii
	diversity	
	relative positioning of graphics and headings	
	simplicity	
	text flow	
	typography	
Structure and layout may include:	boxes	Throughout workbook
	colour	
	columns	
	drawing	
	graphics	
	headings	
	letter and memo conventions	
	page layout	
	photographs	
	typeface	
	white space	
Consistency of design and layout may include:	annotated references	197–201
	borders	3
	bullet/number lists	32–41
	captions	176
	consistency with other business documents	throughout workbook
	footnotes/endnotes	197–201
	indentations	Throughout workbook
	page numbers	154

Variable	Scope	Pages
	spacings	Throughout workbook
	typeface styles and point size	Throughout workbook
Formatting rows and column may include:	auto distribute	n/a
	fills/shading	50
	lines and borders	53, 55
	merge cells	52
	sorting contents	58
	split cell	52
	text direction	49
Other data may include:	clip art	10, 32
	data from other software applications	83–88
	digital photographs	n/a
	files	80–88, 111–114
	graphics	6–10
	quotes	n/a
	references	n/a
	scanned photographs and logos	30, 81
	tables, graphs and charts	46–65, 83–85
Formatting of other data may include:	colour	Throughout workbook
	cropping	
	layout	
	position in relation to other text	
	size	
Printing may include:	print merge	97
	print to file	n/a
	to fit specific number of pages	72
	with comments	176
	with drawing objects	Default setting
	with field codes	77
	with hidden text	n/a
Naming and storing documents may include:	authorised access	xii
	file names according to organisational procedure e.g. numbers rather than names	ix
	file names which are easily identifiable in relation to the content	
	file/directory names which identify the operator, author, section, date etc.	
	filing locations	v–viii
	organisational policy for backing up files	xi
	organisational policy for filing hard copies of documents	xiv
	security	xii–xiv
	storage in folders/sub-folders	v–viii
	storage on hard/floppy disk drives, CD-ROM, tape back-up	v–viii, xi
Designated time lines may include:	time line agreed with internal/external client	x
	time line agreed with supervisor/person requiring spreadsheet	
	organisational time line e.g. deadline requirements	

Evidence guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

<p>Critical aspects for assessment and evidence required to demonstrate competency in this unit</p>	<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> • production of text documents using advanced software functions • application of document design principles.
<p>Context of and specific resources for assessment</p>	<p>Assessment must ensure:</p> <ul style="list-style-type: none"> • access to an actual workplace or simulated environment • access to office equipment and resources • access to examples of complex text documents and style guides.
<p>Method of assessment</p>	<p>A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:</p> <ul style="list-style-type: none"> • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of documents with complex design • demonstration of techniques • oral or written questioning to assess knowledge of word processing software functions.
<p>Guidance information for assessment</p>	<p>Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:</p> <ul style="list-style-type: none"> • BSBWRT401A Write complex documents.

Employability Skills Mapping

Employability Skills for BSB40507: Certificate IV in Business Administration

Employability Skill	Industry/enterprise requirements for this qualification include	How this Employability Skill is covered
Communication	<ul style="list-style-type: none"> communicating with colleagues and customers to gather information about their needs and to provide services listening to and following complex oral instructions proofreading and editing writing clear and detailed instructions 	Proofreading and editing of documents is addressed throughout the workbook
Teamwork	<ul style="list-style-type: none"> agreeing on the purpose and structure of documents, spreadsheets and databases with colleagues and clients collecting feedback from customers and colleagues coordinating and consulting with meeting participants referring queries to colleagues 	Pages xviii–xxiii describe the purpose and structure of documents
Problem solving	<ul style="list-style-type: none"> analysing document requirements and using online help, manuals and user documentation determining appropriate strategies to respond to user requests diagnosing customer service complaints and taking steps to improve the service making decisions about classification and storage of records 	Page xv describes the use of manuals
Initiative and enterprise	<ul style="list-style-type: none"> designing complex documents, databases and spreadsheets evaluating tasks to improve efficiency suggesting improvements to the structure and design of existing systems 	Complex document design is described throughout the workbook

Employability Skill	Industry/enterprise requirements for this qualification include	How this Employability Skill is covered
Planning and organising	<ul style="list-style-type: none"> • organising resources, equipment and time lines • organising work schedules and meetings • planning future business technology requirements • planning task organisation to meet time lines 	Page ix describes organising and prioritising
Self management	<ul style="list-style-type: none"> • evaluating own performance and identifying areas for improvement • managing time and ensuring ergonomic requirements are met • planning and reviewing own work • using judgement and discretion with confidential information 	Software Publications WHS contains information on ergonomic requirements <i>Included with downloaded exercise files</i>
Learning	<ul style="list-style-type: none"> • actively participating in coaching and mentoring sessions to improve standards of service provision • attending training/induction in the use of administrative systems 	n/a
Technology	<ul style="list-style-type: none"> • maintaining existing business technology and planning for future requirements • using business technology such as computers, word processing programs and printers 	Business technology is used throughout the workbook

Entering Data

Exercise 76

- Click in the Title box (field) and enter the following information. Press Tab to move to the next box (field). In the Payment box press Enter rather than Tab to prevent a new entry being created.

Title: Mr
First Name: L T
Last Name: Brookes
Company Name: Brookes & Cane Pty Ltd
Address Line 1: PO Box 345
Address Line 2: CRONULLA
State: NSW
Postcode: 2230
Rate: 7
Payment: 1550.50

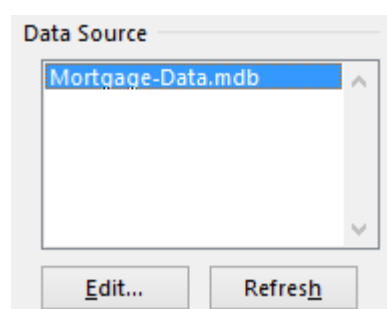
- Click on OK.

You will be prompted to save the data that has been entered. By default, Word will display the My Data Sources folder although you may save the data source in any folder.

- Type the file name **Mortgage-Data** and click on Save.

From the Mail Merge Recipients window, data can be sorted, filtered and edited. Additional records can also be added.

- Select **Mortgage-Data.mdb** from the *Data Source* list and click on .




- Click on .

- Type the following information pressing Tab after each field. Press Tab in the Payment field to start a new record when appropriate (i.e. not on the last record). It is important not to type a space at the end of field entries, or extra spaces will appear in the merged documents.

Title	Mr	Mrs	Miss	Mrs	Mr
First Name	R D	J	Janice	S R	David
Last Name	Shields	Baird	Adams	Green	Owens
Company Name	Milbrook & West		Adams & Johns Pty Ltd	Paper Plus Pty Ltd	
Address Line 1	23 James Street	GPO Box 1095	12 Bertram Avenue	PO Box 1897	2 Omanu Road
Address Line 2	SOUTHBANK	SYDNEY	MOSSMAN	DROUIN	ROSEHILL
State	QLD	NSW	NSW	VIC	NSW
Postcode	4025	2001	2045	3845	2155
Rate	9	7	7.5	8	7
Payment	1255.75	1495.95	1200.00	1100.00	1150.00


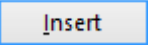
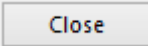

- 7 Click on OK then click on Yes to save your changes.
- 8 Click on OK.

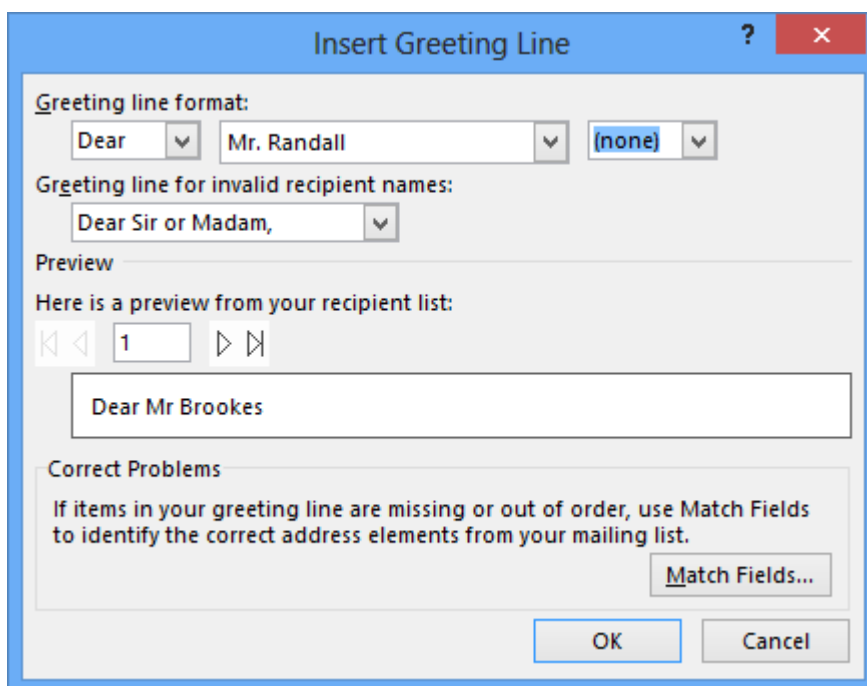
Note


To add additional records or edit the data file, click on  [Edit recipient list...](#) on the Task Pane.

Creating the Main Document

Exercise 77

- 1 Click on the [Next: Write your letter](#) hyperlink. Save the main document with the file name **Mortgage-Main**. The data source file will also be saved.
- 2 Change the top margin to 5 cm. Remove all line and paragraph spacing from the document.
- 3 Insert the date and press Enter three times.
- 4 Click on  [More items...](#) in the Task Pane to display the Insert Merge Field dialog box.
- 5 With Title selected click on .
- 6 Repeat for name and address fields (they will be displayed across the page). Do not include the Company Name.
- 7 Click on .
- 8 Space out the fields as shown below using the Spacebar and Enter key.
«Title» «First_Name» «Last_Name»
«Address_Line_1»
«Address_Line_2» «State» «Postcode»
- 9 Click at the end of «Postcode» and press Enter three times.
- 10 Click on  [Greeting line...](#) in the Mail Merge Task Pane.
The style of greeting for the letter can be chosen from the Greeting Line dialog box.
- 11 Ensure the options shown below are selected (take care to ensure **none** is selected in the punctuation box). Click on OK.



- 12 Press Enter twice.
- 13 Complete the letter by typing the text given below and using  [More items...](#) on the Task Pane to select and insert individual fields as indicated.

We are pleased to announce that mortgage rates have decreased as from this month. The new rate of interest on your mortgage will be «Rate»% which will reduce your monthly payments to \$«Payment».

Please contact me if you require further information.

Yours sincerely

Melanie Bryant
Manager

- 14 Save the main document.


Note

Merge fields can be copied in the same way as normal text, i.e. to the Clipboard (and pasted) or Ctrl and drag.



Merging the Data Source File with the Main Document

Exercise 78

- 1 Click on the [Next: Preview your letters](#) hyperlink.
- 2 On the Task Pane click on the arrow button at the right of *Recipient: 1* to scroll through a preview of each letter.

<< Recipient: 1 >>
- 3 Click on the [Next: Complete the merge](#) hyperlink.
- 4 To merge the letters to a new document before printing, click on  [Edit individual letters...](#).
- 5 Click on OK.
- 6 Scroll through the document to see the merged letters. Notice the document has been given the file name of Letters1.
- 7 Click on **FILE** then click on the Close button **Close** to close the merged letters.
- 8 Click on Don't Save. The main document and data source file can always be merged at a later date to view a letter.

Note

It is possible to print the document without merging to individual documents first. Instead of clicking on  [Edit individual letters...](#), click on the  [Print...](#) option and click on OK. The Print dialog box will display.

- 9 Save and close the main document (**Mortgage-Main**). The data source file is saved and closed at the same time.

Mail Merge using the Mailings Ribbon

With this method the data source file is set up as a table. Each column is a field with field names inserted across the first row. Data is then typed in. The main document is created using field names from the table and then the documents are merged.

General Instructions

Setting up the Data Source File

- 1 In a new blank document change the orientation to landscape.
- 2 Create a table with the same number of columns as fields required for the mail merge.
- 3 Enter the field names in the first row, select and apply bold.
- 4 Enter data into the table.
- 5 Save with an appropriate file name and close.

Creating the Main Document

- 1 Display a new blank document and remove all line and paragraph spacing.



- 2 With the Mailings Ribbon displayed, click on **Merge** and select **Letters**.



- 3 Click on the **Select Recipients** button and select **Use an Existing List...**. Select the data source file for the letter and click on **Open**.

This will attach the data file to the main document. The contents of this file can be viewed

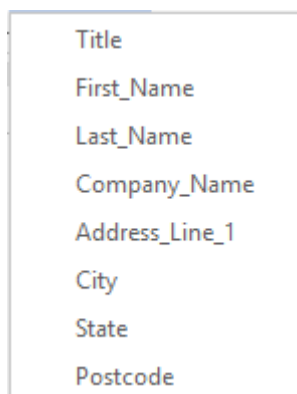


using the **Edit Recipients List** button.

- 4 Insert the date and press Enter three times.





- 5 Click on **Field** of **Field**. The available fields will display in a menu as shown below.




- 6 Select the fields to insert them into the letter. Complete and save the document.

Matching Selection

Exercise 124




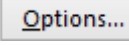


- 1 Using **Roses1**, press Ctrl Home.
- 2 Select the first heading *Growing Beautiful Roses*.
- 3 Format the heading to Arial 20 pt, bold, all caps, centred, 6 pt spacing before, 12 pt spacing after.
- 4 With the heading selected position the mouse pointer over Heading 1 in the Styles Task Pane and click on . Select *Update Heading 1 to Match Selection*.
- 5 Select the second heading *General Information*.
- 6 Format the heading to Arial 16 pt, bold, italics, all caps, left aligned, 6 pt spacing before and after.
- 7 With the heading selected click on the  of the Heading 2 style in the Styles Task Pane and select *Update to Heading 2 Match Selection*.
- 8 Scroll through the document. The changes made to the styles are reflected in all headings where a Heading 1 or 2 style has been applied.
- 9 Modify and update the following styles.
 - Heading 3* Arial, 13 pt, bold, left aligned, 6 pt spacing before and after.
 - Heading 4* Arial, 12 pt, bold, (no italics) small caps, left aligned, 6 pt spacing before, 3 pt spacing after, font color Automatic.
 - List Bullet* Apply 6 pt spacing after bulleted paragraphs.
- 10 Save the document and leave it open for the next exercise.

Create a New Style

New styles can be created 'by example'. Text is typed and formatted to the requirements of the style. Alternatively, a new style can be created by clicking on the New Style button  (on the Styles Task Pane), specifying a style name and formatting from the New Style dialog box.

Style by Example

Exercise 125

- 1 On the first page of the **Roses1** document, click in the paragraph *Avoid overhead watering...* Ensure the Normal style is displayed in the Styles group on the Home tab.
- 2 Change the text to form a style as follows:
 - a Click on the  of the Borders button  and select  **Borders and Shading...** Add a Shadow border with a width of 1 pt. Click on . From text (all sides) apply 10 pt then click on OK. Click on the Shading tab and apply White, Background 1, Darker 15%. Click on OK to go back to your typing screen.
 - b Click on the Paragraph Group dialog box launcher  and change the Indentation Left to 2 cm and Right to 2 cm. Click on OK. (This will indent the border from the left and right margins.)
- 3 With the cursor still in the paragraph, click on  on the Styles Task Pane and in the *Name:* box type: **Shaded Border**. Click on OK.

Note

The Style name must be unique, i.e. you cannot use a style name that already exists.

- 4 Apply the style *Shaded Border* to the text - *To prevent diseases...* on page 3.
- 5 Press Ctrl End then press Enter twice.
- 6 Apply the *Shaded Border* style and type the paragraph shown below.


Many varieties of camellias are suitable for growing in tubs. Select a suitable potting mixture such as Palmers Shrub and Tub, which will provide good drainage.

- 7 Press Enter then press Ctrl Shift N to apply the Normal style.
- 8 Place the cursor in the above paragraph, edit the *Shaded Border* style as follows, then update the style:
 - Change the line style to 1½ pt and from Options, alter From text (all sides) to 6 pt. Apply White, Background 1, Darker 5% shading. Change the Indentation Left and Right to 0.2 cm.
- 9 Check the *Shaded Border* style applied in the document and you will see the changes.
- 10 Save the document and leave it open for the next exercise.

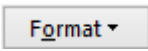
Using the New Style Dialog Box

You will now create a border style with a shortcut key and insert a heading.

Exercise 126

- 1 Using **Roses1**, press Ctrl End, then press Enter.
- 2 Ensure the Normal style is applied.
- 3 Click on  on the Styles Task Pane.
- 4 Type the name: **Side Heading** and change options as shown below.

Properties	
Name:	Side Heading
Style type:	Paragraph
Style based on:	Normal
Style for following paragraph:	Normal

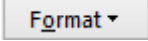
- 5 Using the Formatting section to make the following changes:
 - Font* Arial 12 pt, bold
- 6 Click on the Format button  and apply the following:
 - Paragraph* Indentation: left 0.2 cm, right 13 cm, 4 pt spacing after, Alignment: left.
 - Border* Setting: 1½ pt box border; Shading Olive Green, Accent 3, Lighter 80%.
- 7 Leave the Create New Style from Formatting dialog box open and leave the document open for the next exercise.

Applying a Shortcut Key to a Style

A shortcut key can be assigned to a style from the Modify Style or Create New Style from Formatting dialog box.

Exercise 127

- 1 Using **Roses1**, check the Create New Style from Formatting dialog box is open.

- 2 Click on  and select Shortcut key.
- 3 With the cursor in the *Press new shortcut key:* box, press **Alt H**.
- 4 Click on Assign, then on Close.
- 5 Click on OK from the Create New Style from Formatting dialog box.
- 6 Type the heading: **Tub Culture**
- 7 Apply the same style to the heading called *Pruning* by selecting the text and pressing Alt H.
- 8 Save the document and leave it open for the next exercise.

Character and Paragraph Styles

A *paragraph style* is applied to a paragraph and a *character style* is applied to selected characters only as shown below.

Paragraph style

e.g. 9 pt Before, Times New Roman 11 pt, Justified.

Applied from one paragraph mark to another or to selected paragraphs

¶

A **paragraph** style applies the style properties to the entire paragraph, i.e. from one paragraph mark ¶ to another, or to selected paragraphs. **Paragraph formats** include the chosen font and font attributes, line spacing, alignment, tabs, borders and other formats.¶

A **character** style applies commands selected from the Font command - actual font, size, and attributes such as bold, italics, caps etc. **Character formats** are used to emphasize specific words and phrases and also for some built-in styles such as Page Numbers. ¶

Character style

e.g. Arial 10 pt, bold, italics.


Applied to one character or selected characters

Icons are displayed on the Styles Task Pane, which identify the type of style.

Side Heading

 Paragraph style

Heading 4

 Linked style (both paragraph and character style)

Emphasis


 Character style

Exercise 128

Word has many standard styles. Most of those appear automatically when you carry out that function, e.g. if you create a footer then you will see that a Footer style is added to the Styles Task Pane. Do this now:

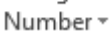


Footer

- 1 Using **Roses1**, on the Insert Ribbon click on the Footer button  and select Blank.
- 2 Type a footer for your document at the left margin: **Growing Roses**
- 3 Press Tab twice to go across to the tab set at the right of the page.



Page

- 4 Click on the Page Number button , select Current Position then Plain Number to insert the page number.



Close Header

- 5 Click on **and Footer**.

On the Styles Task Pane the style Footer has been added. is displayed at the right of the Footer style. This is used to identify a Linked style, which can be applied to either a character or a paragraph.

- 6 Close the Styles Task Pane.
- 7 Save the document and leave it open for the next exercise.

Style and Direct Formatting

Text that is formatted using styles is referred to as *style formatting*. Text that is manually formatted is referred to as *direct formatting*.

Exercise 129

- 1 Using **Roses1**, select the heading at the top of the document (*Growing Beautiful Roses*) and click on the Italic and Underline buttons to change font formats.
- 2 Click on the Align Text Left button .
- 3 Press Shift F1 to display the Reveal Formatting Task Pane displaying information about the formatting of *Growing Beautiful Roses*.
- 4 Ensure a tick is displayed in the *Distinguish style source* check box at the bottom of the Task Pane.

Paragraph Styles and Direct Formatting are displayed on the Task Pane, as shown below.

The screenshot shows a document with the heading **GROWING BEAUTIFUL ROSES** in bold, italicized, and underlined text. The 'Reveal Formatting' task pane is open, showing the following details:

- Selected text:** GROWING BEA
- Formatting of selected text:**
 - Font:** From Paragraph Style: Heading 1, (Default) Arial, 20 pt, Bold.
 - EFFECTS:** All caps.
 - CHARACTER SPACING:** Kern at 14 pt.
 - Direct Formatting:** Italic, Underline.
 - Paragraph:** From Paragraph Style: Heading 1, PARAGRAPH STYLE: Heading 1, ALIGNMENT: Centered, OUTLINE LEVEL: Level 1, INDENTATION: Left: 0 cm, Right: 0 cm, SPACING: Before: 6 pt, After: 12 pt, Line spacing: single, LINE AND PAGE BREAKS: Keep with next.
 - Direct Formatting:** ALIGNMENT: Left.
- Options:** Distinguish style source, Show all formatting marks.

Annotations on the right side of the task pane indicate:

- Paragraph style formatting (encompassing Font, Effects, and Character Spacing)
- Direct character formatting (encompassing Italic and Underline)
- Direct paragraph formatting (encompassing Paragraph style and Direct Formatting)



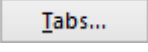
- 5 With *Growing Beautiful Roses* selected press Ctrl Spacebar. This will remove *direct character* formatting.
- 6 To remove *direct paragraph* formatting, with the text selected press Ctrl Q.

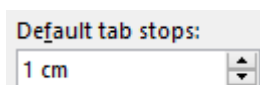
- 7 Turn off the Reveal Formatting Task Pane.
- 8 Save and close the document.


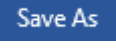

Create a New Template with Styles

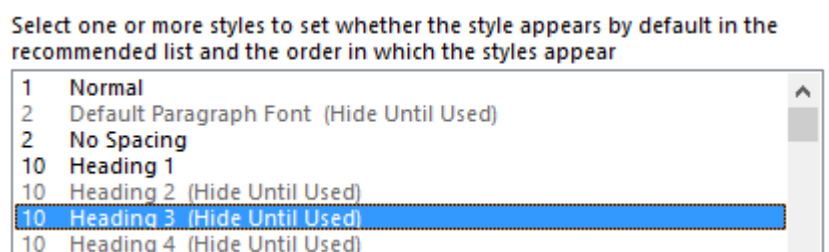
You will create the following new *template*, amend and add styles, use and create macros.

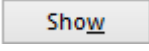
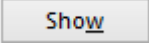
Exercise 130

- 1 Create a new blank document. Retain the default line and paragraph spacing.
- 2 On the Page Layout Ribbon click on the Page Setup Group dialog box launcher . Change the top margin to 2 cm and bottom margin to 2 cm, left and right margins to 2.6 cm. Click on the Layout tab and change the *From edge*: Header and Footer margins to 0.8 cm.
- 3 Click on OK.
- 4 Click on the Paragraph Group dialog box launcher  then click on . Change the Default tab stops to 1 cm.



- 5 Click on OK.
- 6 Click on  then select . Navigate to your exercise files folder.
- 7 Select Word Template from the *Save as type*: box. In the *File name*: box type: **Notes** and click on Save.
- 8 Amend styles as follows using the Modify Styles dialog box.
 - Normal* Arial 11 pt font.
 - Heading 1* Arial 18 pt, bold, all caps, automatic font colour, centred with a 1½ pt box border with grey shading around the heading (use paragraph indents of left: 5 cm, right: 5 cm). Space before: 12 pt, space after: 18 pt.
 - Heading 2* Arial 15 pt, bold, automatic font colour, 18 pt space before, 6 pt space after, left align.
- 9 Heading 3 and Heading 4 are not listed in the Styles group. Display the Styles pane then click on the Manage Styles button .
- 10 Display the Recommend tab and select Heading 3 from the list as shown below.



- 11 Under *Set whether style shows when viewing recommended styles* click on .
- 12 Select Heading 4 from the list and click on .
- 13 Click on OK.

14 Amend styles as follows.

Heading 3 Arial 12 pt, bold, italic, automatic font colour, 12 pt space before, 6 pt space after, left align.

Heading 4 Arial 11 pt, bold (not italic), automatic font colour, 9 pt space before, 6 pt space after.

15 Add the following styles (you may want to use style by example):

Remark Arial 11 pt, square bullet at left margin with 1 cm indent, 6 pt space before, 0 pt after. (Style for following Paragraph: Normal.)

Notation Linked style: Arial 12 pt, bold, small caps with shortcut key as Alt Z.

16 Insert page numbering in the bottom centre of the footer.

17 Edit the Footer style to Arial 10 pt.

18 Print the styles used in the document.

19 Delete any text within the template, save it and close.

Exercise 131

1 Click on **FILE** then click on **New**.

2 Click on **PERSONAL**. Click on **Notes**.

3 Type the document shown below and over the page, correcting mistakes and using styles as indicated.

Windows 8.1 — *Heading 1*

7 Windows 8.1 is the latest operating system from Microsoft. With Windows 8, home users can now get the power and reliability ~~that~~ ~~business users have always enjoyed~~ along with an enhanced ability to use their PC for creative and entertainment activities.

Windows 8.1 is available in 4 editions — *Heading 2*

Windows 8.1 – the basic home edition

Windows 8.1 Pro – for power users and businesses

Windows 8.1 Enterprise – for large organisations

Windows 8.1 RT – used on devices such as tablets


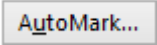
} Remark
Style

What's new? — *Heading 2*

Here are some of the key enhancements that Windows 8.1 brings to PC users.


Exercise 155

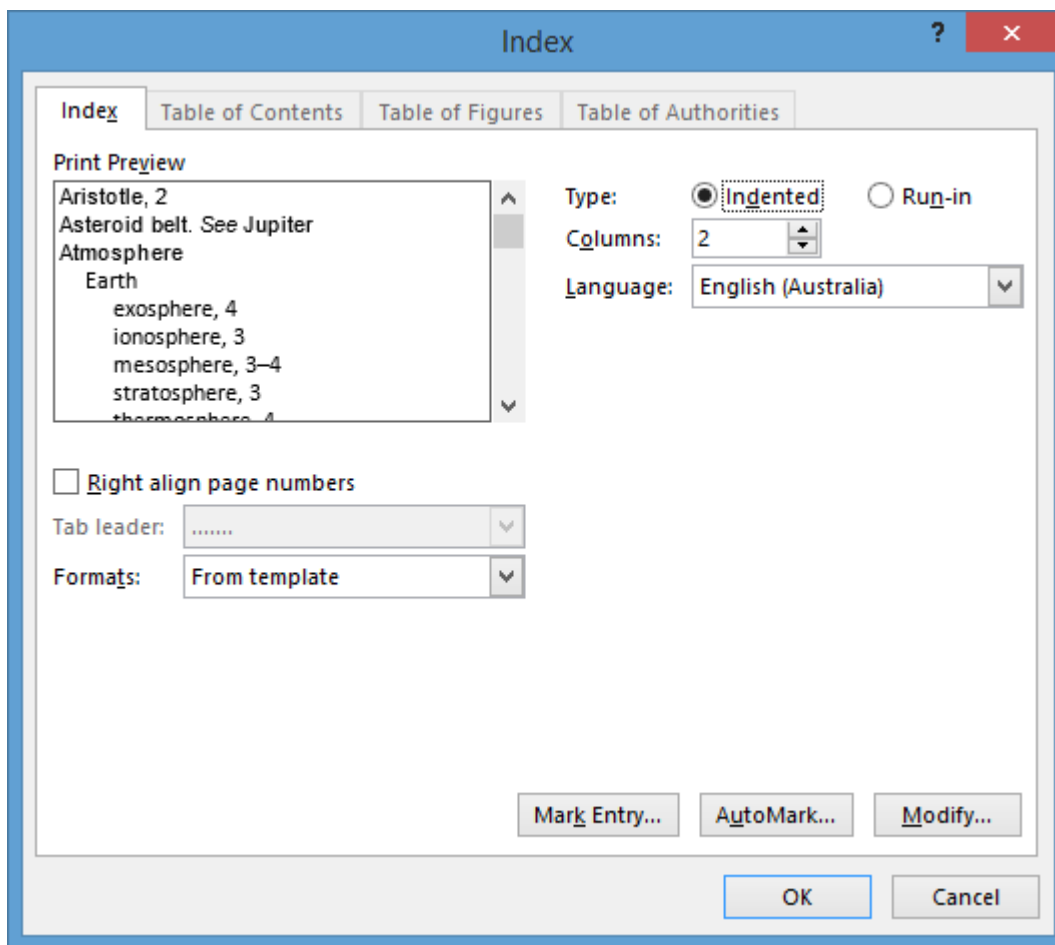
Creating an Index using the Concordance File

- 1 Open the document called **Desktop Publishing** and insert page numbers. Close the footer.
- 2 On the References Ribbon click on  Insert Index.
- 3 Click on .
- 4 Select the file **Mark1** from the Open Index AutoMark File dialog box.
- 5 Click on Open.


Word will automatically search for entries listed in the file **Mark1** and mark each entry as an index field code, e.g. it will search for *Computer* and will mark it with the field code {XE “Computer”}. Non-printing symbols will be displayed.

Once all index entries have been marked the index can then be defined.

- 6 Save the document.
- 7 Move the cursor to the end of the document. Insert a page break and on the last page of the document type the heading **INDEX**. Press Enter. Format the heading to bold, centred, 16 pt, spacing after 24 pt.
- 8 Position the cursor under the INDEX heading. Hide non-printing symbols.
- 9 Click on  Insert Index on the References Ribbon. The Index dialog box will display.



- 10 From the *Type*: section ensure Indented is selected.

- 11 Click on the *Formats:*  and select Bulleted.

An example of the index style chosen will appear in the Print Preview box.

- 12 From the *Columns:* box ensure 2 is selected.

The *Right align page numbers* option will align the index page numbers at the right of each column. If this option is turned on a Tab leader style can be selected which will be inserted before the actual page numbers.

- 13 Ensure that *Right align page numbers* is turned off (no tick shown in check box).

- 14 Click on OK. This will generate and place an index where the cursor is positioned.

- 15 Leave the document open for the next exercise.

Exercise 156

Formatting the Index and Updating Index Entries

When an index is generated, a style is created for each level of the index so you can change the appearance and layout as required.



- 1 Ensure **Desktop Publishing** is open.
- 2 Display the Styles Pane. Select Index 1 from the Styles Pane and alter the font to Arial 8 pt, regular (leave remaining formatting). Styles will automatically update.

If you wish to remove any of the Marked Index Entries at any stage, turn on the display of non-printing symbols, select the index entry in the document (not in the generated index) and press the Delete key.

- 3 Turn on non-printing symbols. Select and delete the index entry *Place* { XE “Place” } on the page 5 of the document. Turn off non-printing symbols.
- 4 To update the index, click in the index and press F9.

Notice that *Place* has now been removed from the index.

It is important that index entries are edited in the actual document and not in the index itself otherwise each time the index is updated, the amendments will be lost.

- 5 To change the case of the index -
 - a Select the index and on the Home Ribbon click on the Change Case button . Select *lowercase*.
 - b Click on Change Case button  and select title case i.e. *Capitalise Each Word*.
(The selected text will not change to title case without changing to lowercase first.)
- 6 Select the A at the beginning of the index and remove paragraph spacing before.
- 7 Save the document.
- 8 Print the index page only, and close the document.

Evidence Guide

Elements and Performance Criteria

The elements and performance criteria are covered during assessment in the following ways.

Element	Performance Criteria	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 addressed	Part 1
1.2	Identify document purpose, audience and presentation requirements, and clarify with relevant personnel as required	Part 2 - Task 1A
1.3	Identify organisational requirements for text-based business documents to ensure consistency of style and image	Part 2 - Task 1A
1.4	Evaluate complex technical functions of the software for their usefulness in fulfilling the requirements of the task	Part 2 - Task 1B
1.5	Match document requirements with software functions to provide efficient production of documents	Part 2 - Task 1A Part 2 - Task 1B
2 Design complex documents		
2.1	Design document structure and layout to suit purpose, audience and information requirements of the task	Part 2 - Task 1A Part 2 – Task 2 Part 2 – Task 3 Part 2 - Task 4 A
2.2	Design document to enhance readability and appearance, and to meet organisational and task requirements for style and layout	Part 2 - Task 1A Part 2 – Task 2 Part 2 – Task 3 Part 2 - Task 4A
2.3	Use complex software functions to enable efficient manipulation of information and other material, and ensure consistency of design and layout	Part 2 - Task 1 Part C Part 2 - Task 1 Part D Part 2 - Task 2 Part 2 - Task 3 Part 2 - Task 4A
2.4	Use manuals, user documentation and online help to overcome problems with document design and production	Part 2 - Task 1A Part 2 - Task 1B
3 Add complex tables and other data		
3.1	Insert a standard table into document, changing cells to meet information requirements	Part 2 - Task 4 A
3.2	Format rows and columns as required	Part 2 - Task 4 A
3.3	Insert images and other data, formatting as required	Part 2 - Task 1 Part C Part 2 - Task 1 Part D Part 2 - Task 2 Part 2 - Task 3 Part 2 - Task 4A

Element	Performance Criteria	Assessment Tasks
4 Produce documents		
4.1	Use complex operations in the development of documents, to achieve required results	Part 2 - Task 1 Part C Part 2 - Task 1 Part D Part 2 - Task 2 Part 2 - Task 3 Part 2 - Task 4A Part 2 - Task 4B
4.2	Preview, adjust and print documents in accordance with organisational and task requirements	Part 2 - Task 1 Part C Part 2 - Task 1 Part D Part 2 - Task 2 Part 2 - Task 3 Part 2 - Task 4A Part 2 - Task 4B
4.3	Name and store documents in accordance with organisational requirements and exit the application without information loss/damage	Part 2 - Task 1 Part C Part 2 - Task 1 Part D Part 2 - Task 2 Part 2 - Task 3 Part 2 - Task 4A Part 2 - Task 4B
4.4	Prepare documents within designated time lines and organisational requirements for speed and accuracy	Part 2 - Task 1 Part C Part 2 - Task 1 Part D Part 2 - Task 2 Part 2 - Task 3 Part 2 - Task 4A Part 2 - Task 4B

Required Skills and Knowledge

The skills and knowledge are covered during assessment in the following ways.

Required Skills	How will Evidence be Gathered?
<ul style="list-style-type: none"> communication skills to clarify requirements of documents 	Can be assessed through communication between candidate and assessor.
<ul style="list-style-type: none"> keyboarding skills to enter text and numerical data 	Part 2 - Task 1 Part C Part 2 - Task 1 Part D Part 2 - Task 2 Part 2 - Task 3 Part 2 - Task 4A Part 2 - Task 4B
<ul style="list-style-type: none"> literacy skills to edit and proofread documents, creating documents with a complex, organised structure of linked paragraphs which use simple and complex syntactic structure 	Part 2 - Task 1 Part C Part 2 - Task 1 Part D Part 2 - Task 2 Part 2 - Task 3 Part 2 - Task 4 A Part 2 - Task 4 B
<ul style="list-style-type: none"> numeracy skills to collate and present data, graphs and annotated references 	Task 1 Part C
<ul style="list-style-type: none"> problem-solving skills to use processes flexibly and interchangeably 	Demonstrated through the completion of all assessment tasks
Required Knowledge	How will Evidence be Gathered?
<ul style="list-style-type: none"> formatting styles and their impact on formatting, readability and appearance of documents 	Part 2 - Task 1 Part A Part 2 - Task 1 Part C Part 2 - Task 2 Part 2 - Task 3 Part 2 - Task 4 A
<ul style="list-style-type: none"> organisational requirements for ergonomics, work periods and breaks, and conservation techniques 	Part 1
<ul style="list-style-type: none"> organisational style guide 	Part 2 - Task 1 Part A Part 2 - Task 1 Part C Part 2 - Task 2 Part 2 - Task 3

Employability Skills BSB40507 Certificate I in Business

Employability skills for BSB40507: Certificate IV in Business Administration are assessed in the following assessment tasks.

Employability Skill	Industry/Enterprise Requirements for this Qualification Include:	Task
Communication	<ul style="list-style-type: none"> communicating with colleagues and customers to gather information about their needs and to provide services listening to and following complex oral instructions proofreading and editing writing clear and detailed instructions 	Part 2 Task 1 A Part 2 Task 1 C
Teamwork	<ul style="list-style-type: none"> agreeing on the purpose and structure of documents, spreadsheets and databases with colleagues and clients collecting feedback from customers and colleagues coordinating and consulting with meeting participants referring queries to colleagues 	Part 2 Task 1 A
Problem-solving	<ul style="list-style-type: none"> analysing document requirements and using online help, manuals and user documentation determining appropriate strategies to respond to user requests diagnosing customer service complaints and taking steps to improve the service making decisions about classification and storage of records 	Part 2 Task 1 A
Initiative and enterprise	<ul style="list-style-type: none"> designing complex documents, databases and spreadsheets evaluating tasks to improve efficiency suggesting improvements to the structure and design of existing systems 	Part 2 Task 1 A Part 2 Task 1 D Part 2 Task 2 Part 2 Task 3 Part 2 Task 4 A
Planning and organising	<ul style="list-style-type: none"> organising resources, equipment and time lines organising work schedules and meetings planning future business technology requirements planning task organisation to meet time lines 	n/a

Employability Skill	Industry/Enterprise Requirements for this Qualification Include:	Task
Self-management	<ul style="list-style-type: none"> • evaluating own performance and identifying areas for improvement • managing time and ensuring ergonomic requirements are met • planning and reviewing own work • using judgement and discretion with confidential information 	Part 1 Time management can be added to Part 2 of the assessment by setting timeframes.
Learning	<ul style="list-style-type: none"> • actively participating in coaching and mentoring sessions to improve standards of service provision • attending training/induction in the use of administrative systems 	n/a
Technology	<ul style="list-style-type: none"> • maintaining existing business technology and planning for future requirements • using business technology such as computers, word processing programs and printers 	Technology is used throughout assessment

BSB Business Services Training Package Supplement

This workbook can be used by learners completing a qualification in the BSB Business Services Training Package.

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

Element <i>Elements describe the essential outcomes.</i>	Performance Criteria <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>	Workbook page reference	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	Software Publications WHS included with downloaded exercise files	Part 1
	1.2 Identify document purpose, audience and presentation requirements, and clarify with relevant personnel as required	6–9, 11, 13, 78, 80–88, 90–120, 124–140, 154–165, 176, 188, 203–214, 223	Part 2 – Task 1A
	1.3 Identify organisational requirements for text-based business documents to ensure consistency of style and image	xvi, xviii–xx, xxii	Part 2 – Task 1A
	1.4 Evaluate complex technical functions of software for its usefulness in fulfilling requirements of the task	Throughout workbook	Part 2 – Task 1B
	1.5 Match document requirements with software functions to provide efficient production of documents	Throughout workbook	Part 2 – Task 1A Part 2 – Task 1B
2. Design complex documents	2.1 Design document structure and layout to suit purpose, audience and information requirements of task	Throughout workbook	Part 2 – Task 1A Part 2 – Task 2 Part 2 – Task 3 Part 2 – Task 4 A
	2.2 Design document to enhance readability and appearance, and to meet organisational and task requirements for style and layout		Part 2 – Task 1A Part 2 – Task 2 Part 2 – Task 3 Part 2 – Task 4A
	2.3 Use complex software functions to enable efficient manipulation of information and other material, and ensure consistency of design and layout	Throughout workbook	Part 2 – Task 1C Part 2 – Task 1D Part 2 – Task 2 Part 2 – Task 3 Part 2 – Task 4A

Element <i>Elements describe the essential outcomes.</i>	Performance Criteria <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>	Workbook page reference	Assessment Tasks
	2.4 Use manuals, user documentation and online help to overcome problems with document design and production	xv	Part 2 – Task 1A Part 2 – Task 1B
3. Add complex tables and other data	3.1 Insert a standard table into document, changing cells to meet information requirements	46–65	Part 2 – Task 4 A
	3.2 Format rows and columns as required		Part 2 – Task 4 A
	3.3 Insert images and other data, formatting as required	6–10, 30, 32, 46–65, 80–88, 111–114	Part 2 – Task 1C Part 2 – Task 1D Part 2 – Task 2 Part 2 – Task 3 Part 2 – Task 4A
4. Produce documents	4.1 Use complex operations to develop documents, and achieve required results	Throughout workbook	Part 2 – Task 1C Part 2 – Task 1D Part 2 – Task 2 Part 2 – Task 3 Part 2 – Task 4A Part 2 – Task 4B
	4.2 Preview, adjust and print documents in accordance with organisational and task requirements	69–73, 77, 97, 176	Part 2 – Task 1C Part 2 – Task 1D Part 2 – Task 2 Part 2 – Task 3 Part 2 – Task 4A Part 2 – Task 4B
	4.3 Name and store documents in accordance with organisational requirements and exit application without information loss/damage	v–xiv	Part 2 – Task 1C Part 2 – Task 1D Part 2 – Task 2 Part 2 – Task 3 Part 2 – Task 4A Part 2 – Task 4B
	4.4 Prepare documents within designated timelines and organisational requirements for speed and accuracy	x	Part 2 – Task 1C Part 2 – Task 1D Part 2 – Task 2 Part 2 – Task 3 Part 2 – Task 4A Part 2 – Task 4B

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	Workbook page reference
Reading	1.3, 2.2, 2.4, 4.3, 4.4	<ul style="list-style-type: none"> Recognises and interprets textual information from a range of resources to determine and confirm requirements and to assist with document issues 	Throughout workbook
Writing	2.1-2.4, 3.3, 4.2-4.4,	<ul style="list-style-type: none"> Develops material using required format and incorporating technical functions to meet business needs 	Throughout workbook
Oral Communication	1.2	<ul style="list-style-type: none"> Uses specific and relevant language to confirm understanding of requirements and listens carefully to verbal instructions and discussions 	Requirements can be discussed with trainer
Numeracy	1.4, 3.3	<ul style="list-style-type: none"> Recognises and inputs numerical information according to requirements 	Throughout workbook
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"> Recognises and follows explicit and implicit protocols and meets expectations associated with own role 	Throughout workbook and Software Publications WHS document
Interact with others	1.2	<ul style="list-style-type: none"> Collaborates with others to achieve joint outcomes 	Workbook exercises can be discussed with classmates, work colleagues or trainer
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"> Applies formal processes when planning more complex/unfamiliar tasks, producing plans with logically sequenced steps 	xviii
		<ul style="list-style-type: none"> Uses advanced features within applications to access, store, organise data and perform routine and complex work tasks 	Throughout workbook

Assessment Requirements v1.0

Performance Evidence

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

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:	Assessment task
<ul style="list-style-type: none"> outline various formatting styles and their effect on formatting, readability and appearance of documents 	Part 2 – all tasks
<ul style="list-style-type: none"> explain organisational requirements for ergonomics, work periods and breaks, and conservation techniques 	Part 1
<ul style="list-style-type: none"> describe purpose and contents of an organisational style guide. 	Part 2 – all tasks