

Contents

BSBITU401A Design and develop complex text documents.....	i
Files Used in this Workbook.....	x
How to Download Exercise Files.....	xii
Office Procedures	i
Windows 8.1 Basics	i
Turning a Computer on and off.....	i
Lock Screen.....	i
Sign in Screen	ii
The Start Screen	ii
Signing Out.....	ii
Switching Users.....	iii
Charms	iii
Restart.....	iv
Shut Down.....	iv
File Management.....	v
Folders, Files and Storage	v
File Explorer	vi
Starting File Explorer	vi
The File Explorer Screen.....	vi
Navigation Pane	vii
Creating New Folders.....	viii
Renaming Files or Folders	viii
Recycle Confirmation	viii
Deleting a File.....	viii
Closing File Explorer	viii
Using Meaningful File Names	ix
Timelines	x
Backup Procedures	xi
Backup versus Copy.....	xi
Backup Software	xi
Organisational Policies for Backing up Files	xi
Protecting Data.....	xii
Unauthorised Access.....	xii
Data Storage	xii
Malware	xii
Antivirus Software.....	xiii
Filing Hard Copies of Documents.....	xiv
Using Manuals.....	xv
Manuals.....	xv
Software Help	xv
Solving Operational Problems	xv
Copyright	xvi
What is Copyright?	xvi
Copyright in the Workplace	xvi
Work Request Forms	xvii
Designing Text Documents	xviii
Document Purpose.....	xviii
Document Audience	xviii
Presentation Media.....	xviii
Task Requirements	xviii
Organisational Requirements	xviii
Standard Formats.....	xix
Templates.....	xix
Styles.....	xix
Logos.....	xix

Colour Schemes and Font Styles	xx
Layout Concepts	xxi
Experimentation	xxi
Appropriateness	xxi
Balance	xxi
Proofreading.....	xxi
Typography	xxi
Consistency.....	xxii
Headings	xxii
Spacing	xxii
Punctuation	xxii
Paragraphs and Alignment.....	xxii
Margins and White Space	xxii
Columns	xxiii
Headers and Footers.....	xxiii
Photographs and Graphics.....	xxiii
Tools for Consistency.....	xxiii

Section 1 – Fonts and Effects, Graphics, Linked Text Boxes, Newspaper Columns, Automatic Hyphenation **1**

Fonts	2
Font vs Typeface.....	2
Font Types	2
Font Size	2
Expanded/Condensed Text.....	2
Font Effects	2
Borders and Shading Dialog Box	3
Adding Border Lines to Paragraphs	3
Page Borders	3
Apply Shading to a Paragraph	4
Shapes	6
Pictures and WordArt	10
Text Wrapping.....	10
WordArt	11
Drop Caps	12
Callouts	13
Flip an Object	13
Gridlines	14
Nudging Objects.....	14
Aligning Drawing Objects Horizontally or Vertically.....	14
Practice Exercise.....	15
SmartArt	16
Organization Chart	16
Newspaper Columns	19
Columns Button.....	19
Columns Dialog Box.....	19
Automatic Hyphenation	20
Balancing Columns	21
Inserting a Line between Columns and Adjusting Spacing	22
Linked Text Boxes.....	22
Changing a Text Box Shape	23
Consolidation Exercises	25
Practice Assessment.....	30

Section 2 – Bullets and Numbering, Macros, Tables, Mathematical Calculations..... **31**

Bullets and Numbering	32
Bullets	32
Numbering.....	34

Define New Number Format.....	34
Multilevel Lists	36
Customised Numbering.....	38
Changing Numbers to Bullets.....	41
Copying Number Formatting	41
Macros.....	42
Recording a Macro	42
Assigning a Macro to the Quick Access Toolbar	43
Deleting a Macro	45
Tables.....	46
Parts of a Table	46
Inserting a Table.....	46
Selecting within a Table.....	47
Aligning Columns and Rows.....	47
Borders and Shading.....	47
Adjusting Column Widths/Row Height.....	47
Vertical Headings in Tables.....	49
Tabs in Tables.....	50
Merging and Splitting Cells.....	52
Nested Tables	54
Floating Tables.....	55
Side by Side Tables.....	56
Table Styles.....	57
Sorting and Adding	58
Mathematical Calculations	60
Mathematical Operators	60
Field Codes	60
To Update a Table.....	61
Updating Field Codes.....	62
Average, Minimum, Maximum Formulas	64
Additional Exercise	65
Practice Assessment.....	66
Section 2 – Document Properties, Fields, Hyperlinks, Linking and Embedding, Mail	
Merge.....	68
Document Properties.....	69
Preview a File.....	69
Print Options.....	71
Removing the Quick Print Button	73
Viewing and Cancelling a Print Job.....	73
Fields.....	75
Hyperlinks.....	78
Linking and Embedding.....	80
Insert and Link Word Documents	80
Insert and Link an Object.....	81
Edit a Linked Object	82
Insert Excel Worksheets.....	83
Insert a Database	87
Analysing a Mail Merge	89
Mail Merge.....	90
Selecting the Main Document.....	90
Setting up the Data Source File.....	91
Entering Data.....	93
Creating the Main Document.....	94
Merging the Data Source File with the Main Document	95
Mail Merge using the Mailings Ribbon	96
General Instructions	96
Managing a Data Source File.....	97

Adding Records.....	98
Deleting Records.....	98
Finding Records.....	98
Editing a Record.....	99
Adding Fields.....	99
Sorting Records from the Mail Merge Recipient Window.....	100
Applying Filters in the Mail Merge Recipients Window.....	100
Filter and Sort Dialog Box.....	101
Creating a Directory.....	103
Using the Mail Merge Wizard.....	103
Specifying Non-Criteria Records.....	104
Deselecting Records from Mail Merge Recipients Dialog Box.....	104
{If...Then} Command.....	106
Comparisons.....	107
{If...Then...Else} Command.....	109
Inserting Linked Files Using {INCLUDETEXT}.....	111
Using a Linked Access Database.....	113
Labels.....	114
Mailing Labels - Using the Mailings Ribbon.....	114
Non-Merge Labels.....	117
Envelopes.....	118
Using the Mail Merge Task Pane.....	118
Non-Merge Envelopes.....	120
Practice Assessment.....	121
Section 4 – Templates, Styles, Headers and Footers, Sections, Forms.....	123
Templates.....	124
Creating a New Template.....	124
Using the Template.....	125
Editing a Template.....	126
Adding AutoText to Templates.....	126
Fields.....	126
Table Keyboard Merge.....	126
Fillin Fields.....	129
Using an Automated Template.....	131
Forms.....	133
Creating a Form.....	133
Creating a Macro to be used in a Form Field.....	135
Applying a Macro to a Form Field.....	135
Locking a Form.....	136
Using a Form.....	136
Editing a Protected Template.....	137
Mail Merge and Templates Assignment.....	138
Styles.....	141
Printing Styles.....	141
Applying Styles.....	142
Applying Styles as you Type.....	144
Editing Styles.....	144
Create a New Style.....	145
Character and Paragraph Styles.....	147
Style and Direct Formatting.....	148
Create a New Template with Styles.....	149
Copying Styles.....	152
Renaming Styles.....	153
Deleting Styles.....	153
Headers and Footers.....	154
Alternating Headers/Footers.....	154
Sections.....	155

Different Headers/Footers in Different Sections	157
Odd and Even Headers and Footers in Sections	158
Viewing Section Breaks	158
Linked Headers	160
Different Footers for Different Sections	161
Gutter Margins	163
Apply to: Option	163
Printing Sections	164
Different Numbering in Sections	164
Formatting Sections	165
Practice Assessment	166
Section 5 – Tables of Contents, Indexes, Outlines, Master Document, Tracking	
Changes	168
Custom Styles	169
Table of Contents	170
Creating a Table of Contents Based on Heading Styles	171
Generate the Table of Contents	172
Table of Contents Styles	173
Updating a Table of Contents	174
Comments	175
Using Hidden Text	175
Using Comments	176
Captions	176
Inserting Captions	176
Cross-references	178
Indexes	188
Creating a One Level Index using the AutoMark feature	188
Creating a Multi Level Index using the AutoMark feature	191
Marking Index Entries	192
Page Number Format of Index Entries	195
Cross-reference	195
Compiling an Index	195
Footnotes and Endnotes	197
Inserting Footnotes	197
Inserting Additional Footnotes	198
Moving Footnotes	198
Deleting Footnotes	199
Editing Footnotes	199
Modifying Footnote Numbers	199
Inserting Endnotes	200
Changing Endnote Format	200
Finding Footnote/Endnote Reference Marks - Notes	201
Converting Endnotes to Footnotes	201
Outlines	203
Using Outline View on an Existing Document	203
Saving an Outline	207
Printing an Outline	207
Creating a New Outline	207
Adding Headings and/or Body Text	208
Master Document	209
Combining Documents into a Master Document	209
Moving Headings	210
Moving a Subdocument	210
Splitting a Subdocument	211
Merging Subdocuments	211
Creating a New Subdocument	212
Removing a Subdocument	212

Creating a Master Document from an Outline.....	213
Formatting a Master Document.....	213
Table of Contents.....	214
Index.....	214
Footnotes.....	215
Endnotes.....	215
Cross-references.....	216
Printing.....	216
Tracking Changes.....	217
Review Tab.....	218
Turning off Display of Revision Marks.....	218
Reviewing Document Changes.....	219
The Reviewing Pane.....	219
Printing Revisions.....	220
Multiple Reviewers - Merging Revisions.....	220
Accepting/Rejecting Revision Suggestions.....	221
Comparing Documents.....	221
Document Protection.....	223
Saving Documents with Passwords.....	224
Revision.....	225
Practice Assessment.....	226
Assessment.....	227
Instructions for Assessor.....	228
Information for Candidates.....	229
Assessment Method.....	229
Special Needs.....	229
Assessment Conditions.....	229
Evidence Guide.....	231
Assessment Material and Equipment.....	236
Assessment Submission Form.....	237
Assessment Agreement.....	238
Final Assessment.....	239
Index.....	251