BSBWRT301A

WORKBOOK

WRITE SIMPLE DOCUMENTS

SUITABLE FOR BSBWRT301

Write Simple Documents

This workbook supports BSBWRT301A Write simple documents in the Business Services Training Package.

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Software Publications writing team

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Disclaimer

THE AIM OF THIS WORKBOOK

The aim of this workbook is to give you skills and knowledge to successfully complete the assessment in the following unit of competency.

BSBWRT301A Write simple documents

This unit describes the performance outcomes, skills and knowledge required to plan, draft and review a basic document before writing the final version.

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

Employability skills

This unit contains employability skills.

Application of the Unit

This unit applies to individuals who are skilled operators and apply a broad range of competencies in various work contexts. They may exercise discretion and judgement to produce a range of basic workplace documentation.

Element On completion of this unit you should be able to:	Performance criteria You will know you have achieved this when you can:
1. Plan document	1.1 Determine *audience* and *purpose* for the document 1.2 Determine *format* and *structure* 1.3 Establish key points for inclusion 1.4 Identify *organisational requirements* 1.5 Establish *method of communication* 1.6 Establish *means of communication*
2. Draft document	2.1 Develop draft document to communicate key points 2.2 Obtain and include any required additional information

Element On completion of this unit you should be able to:	Performance criteria You will know you have achieved this when you can:
3. Review document	3.1 Check draft for suitability of tone for audience, purpose, format and communication style 3.2 Check draft for readability, grammar, spelling, and sentence and paragraph construction 3.3 Check draft for sequencing and structure 3.4 Check draft to ensure it meets organisational requirements 3.5 Ensure draft is proofread, where appropriate, by supervisor or colleague
3. Write final document	4.1 Make and proofread necessary changes 4.2 Ensure document is sent to *intended recipient* 4.3 File copy of document in accordance with organisational policies and procedures

Required skills and knowledge

The following skills and knowledge will be required to successfully complete this unit.

Required skills:

- literacy skills to read and understand a variety of texts; to prepare general information and papers according to target audience; and to proofread and edit documents to ensure clarity of meaning and conformity to organisational requirements

- problem-solving skills to determine document design and production processes.

Required knowledge:

- basic grammar, spelling and punctuation.

- communication protocols

- how audience, purpose and method of communication influence tone

- organisational policies and procedures for document production

- resources to assist in document production, such as dictionary, thesaurus, templates, style sheets.

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.

Audience may include:	• internal and external customers
	• recipient/s who receive a copy for information
	• primary recipient/s of the communication
Purpose may include:	• clarification of issues
	• communication about meetings or events
	• information
	• minutes/outcomes of meetings
	• request for information, advice or assistance
	• statements of fact
	• straightforward advice
Format may include:	• email
	• forms
	• letters
	• memos
	• minutes of meetings
	• organisational templates or proformas for letters, memos or reports
	• tables
Structure may include:	• organisation of the material to suit the format (e.g. scannability for on-screen use)
	• treatment of attachments and hyperlinks
	• visual signposting of material, including use of headings, lists, keywords and text in boxes

Organisational requirements may include:	• house style requirements • identified authorities for signatories for correspondence/communications • protocols, both written and unwritten for the organisation's internal and external communications • requirements for inclusive and non-discriminatory language and for adherence to copyright legislation
Method of communication may include:	• inclusive communication • use of active or passive voice • use of the appropriate register or style of language – formal, standard or informal
Means of communication may include:	• software packages such as MS Word, Excel, PageMaker, PowerPoint and templates
Intended recipient may include:	• audience for document • signatory of the document • supervisor or other staff member who may add to or forward document to another recipient

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.

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • producing a range of documents that accurately convey required basic information • using formatting suitable for intended audience • knowledge of organisational policies and procedures for document production.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • examples of documents.

Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:
	• direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate
	• review of draft documents
	• analysis of responses to case studies and scenarios
	• demonstration of techniques
	• oral or written questioning to assess knowledge of communication protocols
	• review of final documents.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:
	• BSBITU303A Design and produce text documents
	• other general administration units

Backup procedures

A backup is a security procedure to protect data on a computer or computer network. It involves copying files and folders onto a drive that can be stored away from the computer. If the computer is lost or damaged, the information contained in the backup can be loaded onto a new computer.

The contents of your computer(s) should be backed up regularly as valuable data and software can be lost.

- A hard disk can break down or collapse.

- Computers are commonly stolen.

- A natural disaster can destroy your computer.

Backup versus copy

The difference between copying files and creating a backup is that when the files are copied, the actual files are transferred. Copying is a slow process and takes up a large amount of storage space.

Files that are backed up are **compressed**, meaning they are squeezed into one file and cannot be used directly. They must be **restored** to your hard drive before use. Copied files do not have to be restored; they can be used straight away.

Although you can back up files to your hard drive, it is better to back them up to a removable storage media and then store them in a remote location (i.e. different premises), so if the computer is stolen or is destroyed, you will not lose the backup data as well. A wide range of storage media can be used to backup files including special backup tapes, CDs, DVDs and removable hard drives.

Backup software

Backup software allows you to backup data quickly and easily. You can use it to do a one-off backup or to schedule backups on a regular basis.

Scheduled backups work after you tell the program:

- what data to backup

- where to store it

- when to perform the backup.

Windows XP and Windows 7 both come with a backup program.

Workplace policies for backing up files

All workplaces which use computers should have policies and procedures for ensuring important material is backed up regularly. The schedule for backups will depend on the type of organisation and work done and can be:

- several times a day

- daily or every night

- weekly.

The person responsible for backups in the office needs to:

- connect the backup media (e.g. backup tapes or drives) to the computer running the backup

- schedule the backup to meet the organisation's frequency requirements

- take completed backups home to ensure a copy is kept safe offsite.

In your organisation you may be responsible for backing up the material stored on your local computer.

Protecting data

It is of paramount importance that organisations keep their computerised data safe. The data could include:

- personal information on staff and clients

- financial records relating to the business

- files, plans, diagrams or price lists which could give an advantage to competitors if released.

Unauthorised access

The threat of unauthorised access to information data comes from many sources, including:

- burglars

- visitors to the company

- computer hackers accessing the company network, usually using the internet

- staff members who gain access to confidential information.

Preventing unauthorised access

The following security procedures should be followed to prevent unauthorised access to computer data:

- Lock offices containing computer equipment after hours.

- Keep visitors to the site away from unsupervised computers.

- Apply passwords to files so they cannot be opened without entering the password.

- Set up log on names and passwords to access the computer systems.

- Use different log ons to restrict which files different staff members can access, e.g. general staff should not have access employee pay rates.

Viruses and other malware

A computer virus is a program deliberately designed to infect files. Viruses can:

- delete or corrupt files

- delete or corrupt applications

- cause messages to display on the screen

Viruses are transmitted between computers just like a real virus. Whenever data is transmitted through the internet, within a network or by sharing drives, there is a chance that a virus has been transmitted.

The virus hides by attaching itself to another file, such as a database or program.

A virus is an example of **malware** (malicious software). This term describes any software which can harm computers and which is introduced to a computer without consent. Other examples of malware include**:**

Worms	A worm is a computer program which is designed to replicate itself and spread its duplicates across a network. Unlike a virus, it does not need to attach itself to another file to be transmitted. Worms are often transmitted via an email message. When the message is received and opened (or even previewed), the worm infects the user's computer. Some worms will then attempt to send copies of itself to every email address in a computer's email address book.
Trojan horse programs	Trojan horse programs (trojans) allow a hacker to access your computer from a remote location. Once a Trojan has been installed on a computer, the hacker can access the computer and perform various tasks without the owner or user noticing. These could include: • stealing any data • corrupting/damaging files • using the PC to perform illegal or unethical transactions over the internet • keystroke logging – where the hacker records any information typed, e.g. passwords to online bank accounts
Spyware	Spyware is a type of malware installed by unethical business organisations to collect information about a computer user's internet habits. The spyware will monitor user's activity on the internet and send email/internet advertising to the computer based on the type of sites visited.

Protection against malware

Steps can be taken to reduce the risk of your computer or network getting infected by a virus or other malware. Your organisation may have policies similar to these.

- Do not download programs from the internet unless it is from a trusted provider. Downloadable games are particularly prone to having malware attached to them.

- Do not transfer files between computers using discs or USB drives without scanning them for viruses first.

- Do not open email attachments from unknown sources.

- Check up-to-date antivirus software is loaded onto your computer and network.

Antivirus software

Antivirus software is used to protect computers from viruses and other malware. It is designed to check files for viruses and destroy any it finds.

Part of any organisation's data security plan should include the purchase of reputable antivirus software. Software should be kept up to date as new malicious programs are being developed every day. Most antivirus software comes with:

- a licence to update automatically via a safe, scheduled download

- configurations to check every email that arrives before it is opened

- configurations to check every file before it is downloaded and installed.

Antivirus software does not guarantee your computer will never get a virus. Sometimes a virus will slip in unnoticed; however, it does greatly reduce the risk of infection.

Firewalls

A firewall is designed to prevent unauthorised access to a PC. Basically it puts a 'wall' between computers within an organisation and the internet. This wall allows users 'out' to access the internet, but stops malware coming 'in'.

The firewall cannot block all incoming data otherwise it would prevent downloading legitimate software or remove a legitimate file attached to an email.

The firewall has to analyse each piece of data which passes through it to try and distinguish between advantageous and dangerous programs.

Desktop publishing software

Desktop publishing software is used to produce visually impressive documents, such as magazines, newsletters, flyers. Various types of graphics can be used in the documents including lines, boxes, shapes, photographs and illustrations. Examples of desktop publishing programs include Adobe InDesign, Microsoft Publisher and QuarkXPress. Some word processing programs, such as Microsoft Word, have desktop publishing capabilities to some degree.

Desktop publishing software is often used to create:

- flyers, advertisements, brochures

- invitations, business cards, business stationery

- newsletters.

Pet Care Advisory

Article by Blue Collar Vets - Your Local Veterinarian Service

Care of a New Puppy

Going Home

The day you collect your puppy from the breeder is an exciting one for you but for them it is an anxious time facing a strange new world without the company of their litter mates and the comforting presence of their mother. It is now that the all-important bond between both you and your pup should be forged. Their future wellbeing depends largely upon the measure of your reassurance to them. They are still very young and it should be remembered that they need good nourishing food, plenty of sleep, they have little control of their bodily functions, and during the wakeful hours, they need companionship.

Feeding

This is perhaps the most important aspect of care for your puppy and the key to their future health. A good balanced diet is essential to provide the necessary vitamins, minerals and a balance of carbohydrate, protein and fat required for growth.

A puppy up to 12 weeks of age should receive 4 small meals a day (rather than 1-2 large ones). As they get older you can start reducing the number of feeds, especially if they are getting too heavy or they don't want to eat as much.

The easiest way to ensure your pup is getting the best diet possible is to feed a commercially designed 'complete and balanced' puppy ration (these have been specially designed for growing puppies as they have different dietary requirements than adults and consequently they have a lot of trouble efficiently digesting and utilising adult food).

Supplementing the diet with calcium/phosphorus etc. is not necessary as long as a complete and balanced ration is used in the recommended amounts. In fact too much calcium can do just as much harm as too little.

Table scraps should not make up more than 30% of the diet e.g. gravy, vegetables, rice, etc.

Bones should form part of the diet as they provide good dental exercise, however take them away once they start to chew them up - this will help avoid splinters and internal blockages. Brisket bones are food for small dogs. Large canon bones are best fed to medium - large dogs. NEVER feed cooked bones.

Milk is not necessary if a balanced ration is fed. It can cause diarrhoea in some individuals. It is important, however, that there is ad lib water available at all times.

Accommodation

Your puppy should have a place of its own and a cardboard box, with one side cut out for easy access, is quite adequate. Remember that it may be all very well for a young puppy to cuddle up beside you on the couch or on your bed but this is not so acceptable in a large muddy dog and rule changes are hard for them to understand. START AS YOU MEAN TO GO ON.

Presentation software

Presentation programs, such as Microsoft PowerPoint, enable you to create a slide show with graphics and sound enhancements. For example you could promote a product to an audience using a computer and data projector. Slides, presenters notes and audience handouts can be created using a presentation program.

Exercise 4

Identify an appropriate application to create a document that:

1. Advises customers of product prices:

    ....

2. Tells shareholders of last year's accomplishments:

    ....

3. Records events at last week's AGM (Annual General Meeting):

    ....

4. Tells local residents about your lawnmowing service:

    ....

5. Provides accountants with a list of staff salaries:

    ....

Communication methods

The method of communication is the way that the audience is addressed in the document. Remember that the method of communication must always be appropriate for the document's audience(s).

Tone

When speaking to a person, the tone of your voice will colour the conversation, whether you are speaking in a cheerful, positive manner, or whether you sound bad tempered or condescending. The listener will determine your attitude based on your tone of voice. Similarly with writing, the tone of your communication can be as important as the words written.

- Whether you are communicating with a colleague or an external client it is vital that your tone is professional and courteous.

- A confident tone is also important, as it will help to make you look like you understand your subject matter.

- An email that you send to an internal colleague who is at your own level in the organisation may well have an informal tone, but any correspondence to a business contact in another organisation, particularly someone who you have not met in person previously, should be more formal.

- Customers must be addressed appropriately, e.g. Mr ___, Ms ___, To Whom It May Concern. Choose your words with care, particularly if you are writing a difficult letter or are responding to a complaint.

Vocabulary

Ensure the vocabulary you use is appropriate for your audience. If you are communicating with a subject expert who understands the topics you are discussing, it is acceptable to use technical language. However, if readers are unlikely to have the same level of knowledge as you, explain abbreviations or difficult terms and avoid technical jargon. Be particularly careful of this when copying documents to people other than the direct recipient, where not everyone may have the same amount of knowledge of the subject.

Slang should not be used in business documents. Use plain English wherever possible.

Active or passive voice

Sentences can be written in either the passive voice or the active voice. When a sentence is in active voice, the subject of the sentence performs the action. This is demonstrated in the following sentence:

Jamie is driving the car

| | | |
Subject   Action   Object

Subject: Jamie is the subject of the sentence. He is performing the action.

Action: Driving is the action being performed.

Object: The car is the object being driven.

In sentences written in the passive voice, the subject of the sentence has the action performed on it.

The car is driven by Jamie

| | | |
Subject   Action   Object

Subject: The car is now the subject. It is having the action performed on it.

Action: Driving is the action being performed.

Object: Jamie is now the object.

Compare these active and passive voice sentences:

Active	Passive
Jenny wrote a letter	The letter was written by Jenny
Raj took the bike	The bike was taken by Raj
The sales team exceeded the targets	The targets were exceeded by the sales team

When to use active and passive voice

Active voice is the one most commonly used. Sentences written in the active voice tend to be simpler and easier to understand. Documents written in active voice tend to appear more clear and direct.

Remember

When writing in the active voice, the subject performing the action is the most important part of the sentence.

Creating forms

Careful layout, such as the use of leader lines and boxes, can greatly enhance the ease of use of a form and assist the user to know what information is being requested.

PHONE NO:	Evenings:...........................	— Leader line
DO YOU WANT:	Full-time work	☐
	Part-time work	☐
		— Check boxes
	Temporary work	☐
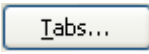
If a form requests the date of birth and this data is going to be inserted into a computer database in the form '09/10/1966', it is useful to ask the form-filler to fill in their date of birth in the correct format, so leaving the space:

DOB: _ _/_ _/_ _ _ _

Also, make sure adequate space is left for this information to be inserted.

Leader lines – word processing revision

The following are step-by-step instructions for creating leader lines which can be used with either Microsoft Word 2007 or 2010.

1. In a new document, click on the ruler to position a left tab where you want the leader line to end.

2. Click on the Paragraph Group Dialog Box Launcher button `Paragraph` ▫.

3. Click on the Tabs button `Tabs...` to open the Tabs dialog box.

4. In the Tab stop position: box click on the tab that the leaders are to go up to, e.g. 8 cm.

    Tab stop position:
    8 cm
    8 cm
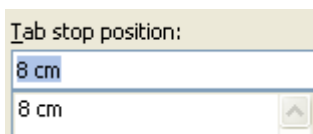
5. In the Leader section click on option **2** to insert dots up to the tab set at the right margin.

    Leader
    ○ 1 None   ⊙ 2 ....   ○ 3 -------
    ○ 4 ___

    (Alternatively select option 4 to create a dashed leader line.)

6. Click on `Set` then click on OK.

7. Press the Tab key to insert the leader dots.

Exercise 8
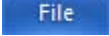
Create the following form using a word processing program.

Personnel Contact Details

Private and Confidential

Given name:................................. Middle name..

Family name: ....

Address: ....

....

Phone (home): .... Phone (mobile): ....

Email: ....

Next of kin name: .... Contact number: ....

Relationship to you:...................................

Open and use a memo template – Word 2010
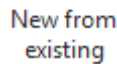
Many organisations will have a template to use when typing and sending a memo. The following exercise steps you through the process of opening a memo template, filling in the required information and then saving the memo as a document.

Exercise 9

1. In Microsoft Word, click on the File tab [File] and select New.

2. Click on the New from existing button [New from existing] . The New from existing dialog box will display.

3. Navigate to the folder containing your exercise files.

4. Select the file called **MEMORANDUM** and click on Create New. A new document based on the template will open.

5. Fill in the memo template as shown below. Note that the current date will be entered automatically.

MEMORANDUM

TO:	Malcolm Xian
FROM:	(Add your name)
DATE:	29 September 2011
SUBJECT:	Stationery Stock Take

Hi Malcolm

Just letting you know there will be a stock take of the stationery room next Wednesday. Your assistance is requested. We will start at 2.00 pm and hopefully it will take less than 2 hours.

Thanks

6. Save the document with the name **Stocktake memo**.

7. Print one copy of the file and close.

8. Exit Microsoft Word.

Exercise 10

Eureka Gifts and Toys Manufacturers Pty Ltd scenario

You are a factory worker on the wooden toys production line at Eureka Gifts and Toys Manufacturers Pty Ltd.

Task 1 Draft an email

- Last month your manager put you in charge of a special project. The project involves ensuring sufficient stock has been accumulated for the 'House and Garden Expo' which is to be held in the city centre in one month.

- Unfortunately one of your suppliers has suffered a fire and has been unable to supply the wood and paint that you need.

- Because of this you are not on target to produce all the toys needed in time for the Expo.

- However, as fewer toys have been produced you have currently only incurred 50% of the costs that you were budgeted.

- You have located a potential new supplier, but using this firm will have to be approved by your manager.

You feel you need to let your manager know about this situation right away. Therefore you have decided to write an email explaining everything.

1. List the main points you will include in your email:

  ....

  ....

  ....

  ....

  ....

2. Use a word processing or email program to write a draft email.

3. Print one copy of the draft.

Task 2 Draft a short report

This task carries on from the Eureka Gifts and Toys Manufacturers scenario.

The Finance Manager at Head Office, Jack Straw, has asked for a financial update on your special project. You need to tell him what you have spent and what you had budgeted to spend.

The financial data you need to supply is provided below:

Item	Budgeted amount	Spend to date
Wood	$345	$155
Paint	$125	$56
Internal mechanisms	$240	$240
Staff overtime	$500	$250
Administration	$290	$340

1. Use a word processing program to draft a short report to Mr Straw providing the above information.

    - Since this is a very short report, you will not need to include headings. Simply add a suitable report title to the top of the page.

    - Include for the budget and the actual spend to date.

    - In addition you will need to give a reason why administration costs are already above budget at this early stage of the project (it is because of the supplier's fire, which has meant that you have had to process a lot more paperwork trying to find replacements).

    - Use a logical layout (e.g. use a table or bullet points to present the data).

2. Print one copy of the draft report.
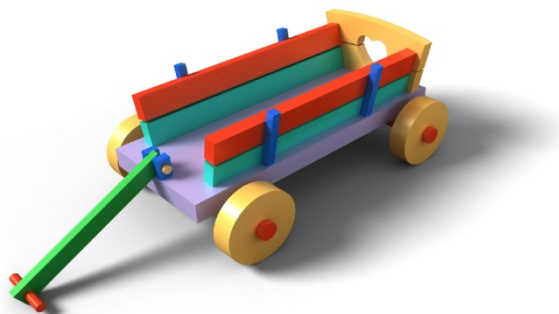
File the document

The final stage is to file the document in accordance with organisational policies and procedures. There is always a need for a certain amount of information storage within a business situation.

Example

Customer records have to be retained for reference, and the Australian Taxation Office requires that all accounting documentation be kept for a number of years. In the interests of organisational security, there are usually certain requirements for the way in which information is stored and when and how it should be disposed of.

Filing might seem a menial, unimportant task, but it is a vital part of the business operation. A good filing system should provide safe and organised storage for records, as well as quick identification and retrieval.

The two main methods of filing office information are:

- physical filing systems

- computer filing systems.

Physical filing systems

If a physical copy (hard copy or paper copy) is required for storage, it can be kept in a filing cabinet or in ringbinders. Named dividers should be used to categorise the documents. Examples include:

- alphabetical dividers

- specific document types, e.g. letters, memos, reports, forms, emails

- company areas, e.g. accounts, orders, general correspondence

- company names where there is more than one company within an organisation

- customer numbering system.

Documents are usually filed in alphabetical or date order (the most recent date would be first for easy access).

Preparing a document to be filed

1. Remove staples and paper clips, which can easily become dislodged or catch onto other papers within a file.

2. Repair any tears with transparent tape.

3. Check to see if there are related documents and put them together. Alternatively, file documents in date order with the oldest on the bottom.

4. If a document is very small, e.g. a business card, and could get lost, it should be taped onto a larger piece of paper. Alternatively, it could be placed in a marked envelope or plastic holder.

Should it be placed in a new folder before filing?

If the document relates to a new customer, it may be necessary to prepare a new folder. This should be created according to the filing system in use.

Does it require indexing/coding?

In a library filing system, books are indexed according to their categories (fiction, non-fiction, reference, etc.) and they are coded according to their position within the library. These codes are usually placed on the spines of the books.

Office filing systems are similar. A code is usually written in the top right corner of every file. Alternatively, where a filing system uses customer names an additional coding number might not be required.

Does the document require cross-referencing?

Cross-referencing links up related documents in a filing system. Sometimes it might be necessary to photocopy a document in order to store it in two separate locations.

Computer filing system

An organisation should have polices for how electronic files are stored and safeguarded. Computers have the ability to store vast amounts of data and a poor filing system can make it difficult to locate documents when required.

It is important to determine where data is to be stored in your organisation. You may be required to:

- store data on your PC hard drive

- save it to an allocated network drive

- save it on a portable drive.

If material is stored on CD or DVD disks or on portable drives, there should be an allocated storage area. This area should ideally be protected, for example locked in a fireproof box or safe.

Files should be retained in logically named folders/directories so that relevant information can be extracted as required. This folder structure may already be in place or you may be required to create your own folder structure.

It is vital that all computer files are backed up regularly. Files can be lost for many reasons:

- hard drive failure

- computer virus attack

- natural disaster.

Naming documents

You will find it useful to implement a system for naming files so you can locate them easily again later. Your company may already have a naming convention that you should use; this will be given to you by your supervisor or may be documented in a procedures manual.

Suggested naming conventions

Filenames are usually listed alphabetically according to the first word of the name. It is therefore important that the first word is meaningful. Some examples are shown below.

A letter to **Tim Smythe re Word training** could be saved using these formats:

Receiver name first	Smythe, Tim – letter re Word training, July 30 2011
Document type first	Letter – Smythe, Tim re Word training, July 30 2011
Date first	July 30 2011 – Letter to Smythe, Tim re Word training
Job number	09638320 cpj, Smythe T, July 30 11

Remember that punctuation will affect alphabetical ordering so, for example, if you insert commas into some file names but not into others, the alphabetical ordering will be affected.

The following is a summary of different ways of naming electronic files in a rational way.

Name, document type, version and number description	The second letter typed to Deltron Electrical Pty Ltd could be saved as: • Deltron, letter 2 - electrical repairs
Document type, name, version number, description	The third fax sent to Enerco Gas Pty Ltd could be saved as: • Fax - Enerco 3, gas installation
Date, name, description	A balance sheet created on 31 March 2011 could be saved as: • 31-3-11, Balance Sheet

File names with numbers

Some organisations (including legal and insurance firms) use a numbering system whereby each file created assumes the next recorded number or a number is given from a deleted file. A policy could be saved as:

    00100 - Brown, J - Property Insurance

Priority documents

If you are working on one document for a period of time, then for ease of access you could type an exclamation mark in front of the file name. This will make the files appear at the top of the file name list (in any computer program):

    !Office systems report

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Exercise 23

1. What is a carbon copy and a blind carbon copy in relation to email messages?

....

....

....

....

....

....

2. What is a circulation slip?

....

....

....

3. Describe the steps you would take when preparing a paper document for filing.

....

....

....

....

....

4. Describe an example of when you would have to prepare a new folder before manually filing a document.

....

....

....

5. Define the following filing terms.

Indexing:

....

....

....

Cross referencing:

....

....

BSB
BUSINESS SERVICES
TRAINING PACKAGE
SUPPLEMENT

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

BSBWRT301 Write simple documents

Application

This unit describes the skills and knowledge required to plan, draft and finalise a basic document.

It applies to individuals who apply a broad range of competencies in various work contexts and may exercise some discretion and judgement to produce a range of workplace documentation.

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

Unit Sector

Communication – Writing

Elements and Performance Criteria

Element *Elements describe the essential outcomes.*	Performance Criteria *Performance criteria describe the performance needed to demonstrate achievement of the element.*	Workbook pages	How will the evidence be gathered?
1 Plan document	1.1 Determine audience and purpose for the document	34–35, 46	All assessment tasks
	1.2 Determine the format and structure	36–46, 58–62	All assessment tasks
	1.3 Establish key points for inclusion	36, 46, 77	All assessment tasks
	1.4 Identify organisational requirement	63–64	All assessment tasks
	1.5 Establish method of communication	52–57	All assessment tasks
	1.6 Establish means of communication	47–51	All assessment tasks
2 Draft document	2.1 Develop draft document to communicate key points	65–78, 85–87, 107–111	All assessment tasks
	2.2 Obtain and include any additional information that is required	79–83, 85, 87	Assessment task 1 Assessment task 3
3 Review document	3.1 Check draft for suitability of tone for audience, purpose, format and communication style	89–90	All assessment tasks
	3.2 Check draft for readability, grammar, spelling, and sentence and paragraph construction	89–105	All assessment tasks
	3.3 Check draft for sequencing and structure	89–92	All assessment tasks
	3.4 Check draft to ensure it meets organisational requirements	89–90, 93–94	All assessment tasks
	3.5 Ensure draft is proofread, where appropriate, by supervisor or colleague	89	All assessment tasks
4 Write final document	4.1 Make and proofread necessary changes	89	All assessment tasks
	4.2 Ensure document is sent to intended recipient	113–115	All assessment tasks
	4.3 File copy of document in accordance with organisational policies and procedures	116–118	All assessment tasks

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	1.1-1.3, 3.1-3.4, 4.1	• Recognises and interprets a variety of text to determine and confirm task requirements	36, 63–64, 75–78, 84–87, 106–111
		• Proofreads documents checking for grammar, spelling, structure, and suitability of style and format for audience	89–105
Writing	2.1, 2.2, 3.1-3.5, 4.1	• Produces and edits basic documents, according to organisational requirements, for a given audience and purpose	Throughout workbook
Oral communication	2.2, 3.5	• Uses listening and questioning skills to seek additional information or confirmation of task completion	79
Navigate the world of work	1.4, 3.4, 4.3	• Understands and complies with organisational policies and procedures	63–64, 80
Interact with others	2.2, 3.5	• Follows accepted communication practices and protocols when seeking information or feedback from others	35–38, 79, 109
Get the work done	1.1-1.6, 2.1, 2.2, 3.4, 3.5, 4.1-4.3	• Takes responsibility for planning, sequencing and prioritising tasks to achieve required outcomes	33 Through on-time submissions of exercises and tasks as instructed by trainer
		• Uses the main features and functions of digital tools to complete work tasks	47–51, 101–103

Assessment requirements v1.1

Performance Evidence

Evidence of the ability to:	**Assessment tasks**
• plan, draft and finalise three different simple documents that accurately convey the required basic information in a format suitable for the intended audience and in accordance with organisational policies and procedures for document production.	All assessment tasks

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:	**Assessment tasks**
• identify the process for checking basic grammar, spelling and punctuation	All assessment tasks
• describe different communication methods	All assessment tasks
• describe how audience, purpose and method of communication influence the tone of a document	All assessment tasks