

## **Computer Skills**

### **Design and produce text documents (Word 2016)**

This workbook supports BSBITU303 Design and produce text documents in the BSB Business Services Training Package.

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Software Publications writing team

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# BSBITU303 DESIGN AND PRODUCE TEXT DOCUMENTS

## *Application*

This unit describes the skills and knowledge required to design and develop text-based documents using advanced features of word processing software.

It applies to individuals who possess fundamental skills in computer operations and keyboarding, and basic skills in operation of word processing software. They may work as individuals who provide administrative support within an enterprise, or may be technical/knowledge experts responsible for production of their own word processed documents.

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

## *Elements and Performance Criteria*

<b>Element</b> Elements describe the essential outcomes.	<b>Performance Criteria</b> Performance criteria describe the performance needed to demonstrate achievement of the element.	<b>Page reference</b>
1. Prepare to produce word processed documents	1.1 Use safe work practices to ensure ergonomic, work organisation, energy and resource conservation requirements are met	8–14
	1.2 Identify document purpose, audience and presentation requirements, and clarify with relevant personnel as required	20–24, 29, 166
	1.3 Identify organisational and task requirements for text-based business documents to ensure consistency of style and image	22–26, 29, 166
2. Design word processed documents	2.1 Design document structure and layout to suit purpose, audience and information requirements of task	22–23, 29, 166
	2.2 Design document to enhance readability and appearance, and to meet organisational and task requirements for style and layout	22–29, 166
	2.3 Use style sheets and automatic functions to ensure consistency of design and layout	24–26, 46, 72–75, 99–108, 134–139
3. Add tables and other data	3.1 Insert a standard table into a document, changing cells to meet information requirements	38–45, 121–130, 133–134
	3.2 Insert and delete columns and rows as necessary	122–124, 134
	3.3 Insert images and other data to meet required specifications	60–64, 78–84, 116–118

<b>Element</b> Elements describe the essential outcomes.	<b>Performance Criteria</b> Performance criteria describe the performance needed to demonstrate achievement of the element.	<b>Page reference</b>
4. Produce text documents	4.1 Use advanced software functions to enable efficient production of documents	Throughout workbook
	4.2 Enter or import, and edit text and other data to meet required specifications	Throughout workbook
	4.3 Preview, adjust and print documents in accordance with organisational and task requirements	Throughout workbook
	4.4 Name and store text documents, in accordance with organisational requirements and exit application without information loss/damage	Throughout workbook
	4.5 Prepare text documents within designated timelines and organisational requirements for speed and accuracy	Throughout workbook
	4.6 Use manuals, user documentation and online help to overcome problems with document design and production	17

## **Foundation Skills**

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

<b>Skill</b>	<b>Performance Criteria</b>	<b>Description</b>	<b>Page reference</b>
Reading	2.2, 4.3, 4.4, 4.6	Recognises and interprets textual information from a range of sources to determine and adhere to requirements	Throughout workbook
Writing	2.1-2.3, 3.3, 4.2-4.5	Develops documents using required format, accurate spelling and grammar and terminology specific to requirements	Throughout workbook
		Organises content to support purpose and audience of material using clear and logical language	Throughout workbook
Oral communication	1.2	Uses specific and direct language, and listening and questioning techniques to clarify requirements	21, 119, 166
Navigate the world of work	1.1-1.3, 2.1-2.3, 3.1, 3.3, 4.2-4.5	Recognises and follows explicit and implicit protocols and meets expectations associated with own role	Throughout workbook
Interact with others	1.2	Collaborates with others to achieve joint outcomes	22, 29
Get the work done	2.1-2.3, 3.1-3.3, 4.1-4.6	Uses advanced features within applications to address routine and complex work tasks	Throughout workbook

# ASSESSMENT FOR THIS UNIT

This Unit is assessed by:

- observation of good WHS practices
- using a manual or help facility
- completing a time management plan
- creating a logo
- formatting a document
- creating a letter template
- creating a mail merge document
- creating a plan for a newsletter
- creating a newsletter.

## **Assessment Requirements v1.0**

### **Performance Evidence**

<b>Evidence of the ability to:</b>	<b>Page reference</b>
<ul style="list-style-type: none"> <li>• adhere to organisational requirements and strategies when creating text documents including:                             <ul style="list-style-type: none"> <li>• ergonomic requirements</li> <li>• energy and resource requirements</li> </ul> </li> </ul>	8–14
<ul style="list-style-type: none"> <li>• adhere closely to task requirements and required specifications by:                             <ul style="list-style-type: none"> <li>• following designated timelines</li> <li>• achieving consistency of style and image</li> <li>• ensuring correct editing and style requirements</li> <li>• adhering to designated timelines</li> </ul> </li> </ul>	16, 22–29
<ul style="list-style-type: none"> <li>• use advanced software features</li> </ul>	Throughout workbook
<ul style="list-style-type: none"> <li>• communicate effectively with personnel</li> </ul>	22
<ul style="list-style-type: none"> <li>• overcome problems by referring to user documentation, manuals and online help.</li> </ul>	17

### **Knowledge Evidence**

<b>To complete the unit requirements safely and effectively, the individual must:</b>	<b>Page reference</b>
<ul style="list-style-type: none"> <li>• outline various formatting styles and their impact on formatting, readability and appearance of documents</li> </ul>	24–29
<ul style="list-style-type: none"> <li>• explain organisational requirements for ergonomics, work periods and breaks, and conservation techniques</li> </ul>	8–14
<ul style="list-style-type: none"> <li>• describe purpose and contents of an organisational style guide</li> </ul>	24–25
<ul style="list-style-type: none"> <li>• identify purpose, uses and functions of word processing software.</li> </ul>	30

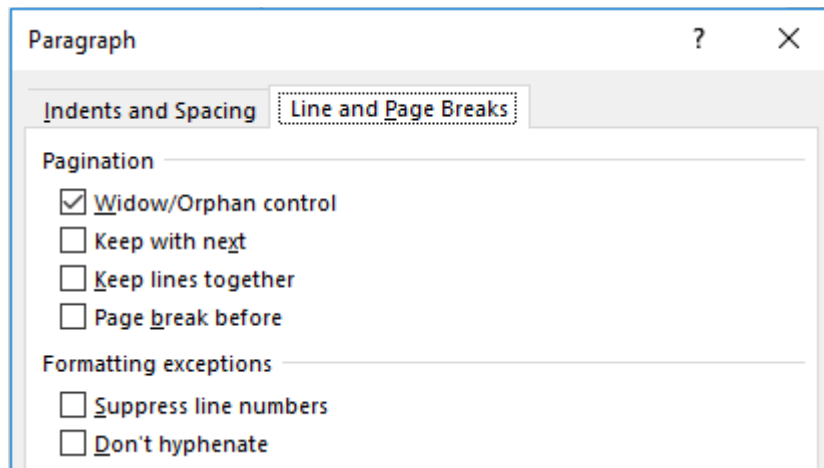
## Pagination

### *Controlling pagination*

The Line and Page Breaks tab of the Paragraph dialog box allows you to control paragraph positioning on the page so a heading is kept with the following text or a table does not have a page break in the middle, etc.

### Pagination instructions

1. Select the paragraph(s).
2. Right click and select Paragraph then select the Line and Page Breaks tab.



**Widow/Orphan control** A widow is the first line of a paragraph that is left at the bottom of a page.

An orphan is the last line of a paragraph that is carried to a new page.

In Word, widow/orphan control is automatically turned on by default so a minimum of two lines of a paragraph will be at the top or bottom of a page.

**Keep with next** Keeps the selected paragraph (which could be a heading) with the following paragraph so that both appear on the same page.



**Keep lines together** Keeps the lines of the selected paragraph together so a page break does not occur in the middle of the paragraph.

**Page break before** Inserts a page break before the selected paragraph to ensure the paragraph always appears at the top of a page.

3. Click on OK.



## Exercise 20





1. Using **Italy**, check the Show/Hide formatting marks are displayed.
2. Delete the page break at the end of page 1 by clicking before .....Page Break..... and pressing Delete twice.
3. Click on  to hide the formatting marks.
4. Select the paragraph which extends from the end of the second page to the top of the third page which begins: *If you have hired a car.*
5. Display the Paragraph dialog box and click on the Line and Page Breaks tab.
6. Put a tick in the *Keep lines together* check box  **Keep lines together**.
7. Click on OK. The paragraph will move to the third page and the text will be kept together. These lines will now be kept together even if there are other changes made to the pagination of the document.
8. Save and close the document.

## Exercise 21

1. Open the file called **Planning a wedding** in the *978-1-925291-32-2 CSS BSBITU303 exercise files* folder.
2. Make the changes shown on pages 58 and 59. Your finished document will display over three pages.
3. Apply 9 pt spacing after all subheadings.
4. Insert round bullet points where \* are shown at the left margin.
5. Insert box-shaped bullet points where □ are shown at the left margin.
6. Position all bullets and numbers to the left margin.
7. Apply 3 pt spacing before items in the numbered and bulleted lists.
8. When complete, save and close the document.

## Applying a border to selected text



### Exercise 29

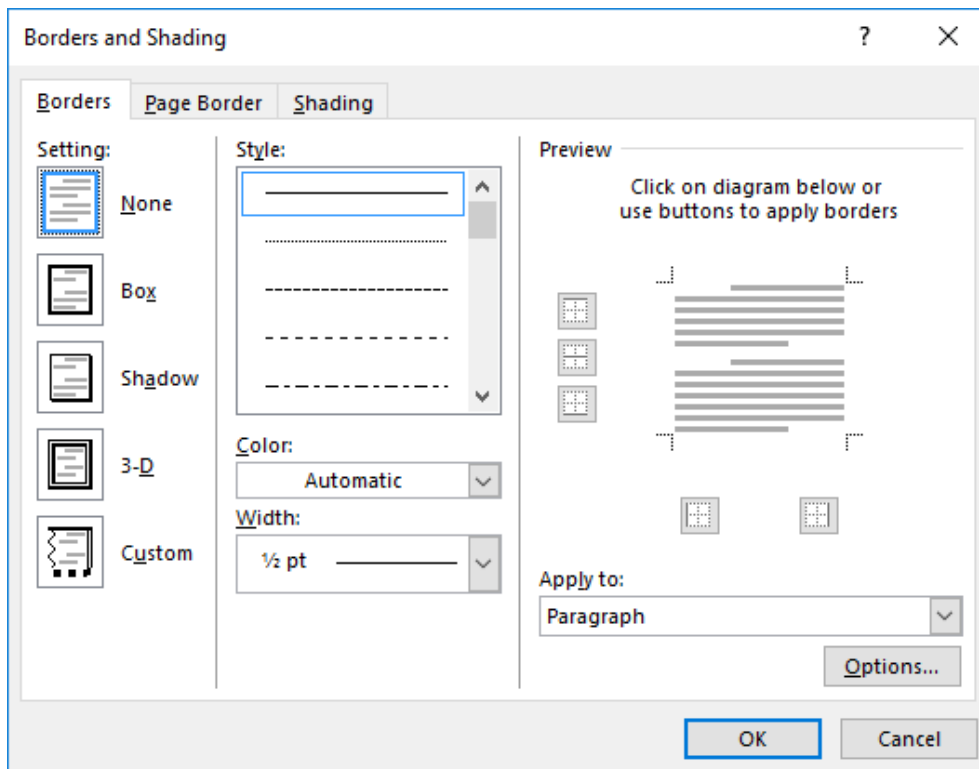
1. Using **Dewey Decimal System**, select from the heading *Classes* down to the end of the paragraph above the heading *Further divisions*.
2. Click on the  of the No Border button and select  **Top Border**.
3. Click on the  again and select  **Bottom Border**. A ½ pt line style will appear above and below the selected text.
4. Leave the document open for the next exercise.


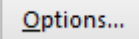
## Using the Borders and Shading dialog box

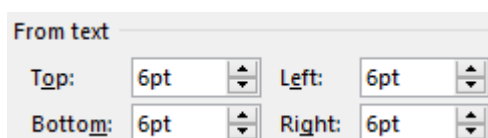
The Borders and Shading dialog box is used to customise borders.

### Exercise 30

1. Using **Dewey Decimal System**, select the *Shelving books* heading and the last paragraph.
2. Click on the  of the Borders button and select  **Borders and Shading...**. The Borders and Shading dialog box will display.



3. In the *Setting:* section, click on Shadow.
4. Click on the Width  and select 2¼ pt.
5. To increase the space between the text and the border click on , change Top, Bottom, Left and Right to 6 pt.



# Printing

The Print screen of the Backstage view provides a range of options including printing selected text or printing a specific range of pages.

## Exercise 38


1. Open the document called **Computer information** in the *978-1-925291-32-2 CSS BSBITU303 exercise files* folder.
2. Click on **FILE** and click on **Print**.
3. Explore the options indicated below.

The screenshot shows the 'Print' dialog box in Microsoft Word. It is divided into several sections: 'Print', 'Printer', 'Settings', and 'Page Setup'. Each section contains various options for printing a document. Annotations with arrows point to specific elements, explaining their function.

- Print:** A 'Print' button with a printer icon. Annotation: 'Click on the Print button to print the whole document using default settings'.
- Copies:** A spinner box set to '1'. Annotation: 'Select the number of copies required'.
- Printer:** A dropdown menu showing 'HP Deskjet F2400 series' and 'Offline: 1 document waiting'. Annotation: 'Select from a list of installed printers'.
- Settings:**
  - Print All Pages:** A dropdown menu with 'The whole thing' selected. Annotation: 'Select from a list of options for what to print, e.g. print selected text only or print the current page only'.
  - Pages:** A text input field. Annotation: 'Enter the page number(s) required, e.g. 1-4'.
  - Print One Sided:** A dropdown menu with 'Only print on one side of th...' selected. Annotation: 'Select one sided or duplex (two sided) printing where available'.
  - Collated:** A dropdown menu with '1,2,3 1,2,3 1,2,3' selected. Annotation: 'Select whether pages are collated'.
  - Portrait Orientation:** A dropdown menu. Annotation: 'Allows a different orientation to be selected'.
  - A4:** A dropdown menu with '21 cm x 29.7 cm' selected. Annotation: 'Allows a different paper size to be selected'.
  - Custom Margins:** A dropdown menu. Annotation: 'Allows different margins to be selected'.
  - 1 Page Per Sheet:** A dropdown menu. Annotation: 'Allows multiple pages per sheet to be printed'.
- Page Setup:** A link at the bottom right. Annotation: 'Opens the Page Setup dialog box to specify more page setup options'.

## SECTIONS

A document can be divided into any number of sections and each section can be formatted differently. A section can be as short as a single paragraph or as long as an entire document. Each section ends with a section break.

When the Show/Hide button  is on a section break is shown as a double line across the screen with the type of section break described.


.....Section Break (Next Page).....

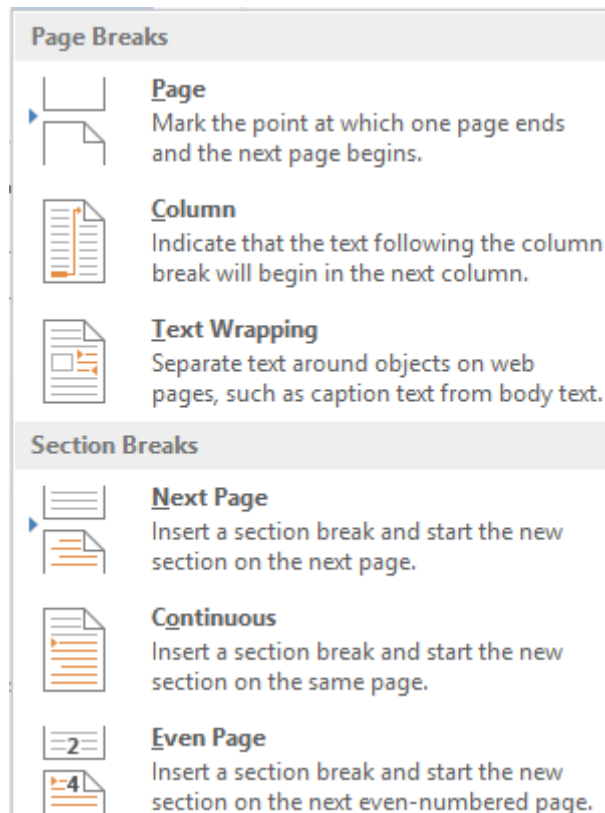
Word stores section formatting characteristics in the section break at the end of a section. If the section break is deleted the formats are deleted also.

A new section is created when you want to change the elements in part of a document, e.g.:

- different paper orientation
- different margins
- different vertical alignment
- text and formatting of headers and footers
- format, position and sequence of page numbers.

Section breaks are inserted from the Layout Ribbon.


1. With the Layout Ribbon displayed, click on  Breaks. The menu displays page and section breaks options.
2. Select the type of break required from the menu.



## Page Setup dialog box

### Exercise 50

In this exercise you will type a two page letter. The first page will have an increased top margin setting to allow for a letterhead and the second page is used for information which will be vertically centred on the page.

1. In a new document, display the Layout Ribbon.
2. Click on the Page Setup Dialog Box Launcher button  and check the Margins tab is displayed.

### Tip

You can double click on the shaded area at the left or right of the horizontal ruler to display the Page Setup dialog box.

3. Change margins to:

Margins

Top:	<input type="text" value="7"/>	Bottom:	<input type="text" value="2"/>
Left:	<input type="text" value="3"/>	Right:	<input type="text" value="3"/>
Gutter:	<input type="text" value="0 cm"/>	Gutter position:	<input type="text" value="Left"/>

4. Notice in the *Apply to:* box that the margins will be changed for your Whole document.

### Preview



Apply to:

5. Click on OK.
6. Use the Paragraph Spacing button on the Design Ribbon to remove all paragraph and line spacing from the document.
7. Save the document in your working folder with the file name **Farrow-Natures Choice**
8. Type the letter on the following page, setting it out in a suitable letter format. Use Calibri 11 pt, justified.

## THE ULTIMATE EXPERIENCE *Heading 1*

### CONTIKI TIME OUT *Heading 2*

Experience the freedom that is **Contiki** with our carefully selected Time Out holidays designed to complement the lifestyle of young people. Let Contiki broaden your horizons to a whole new area of European adventure and indulge yourself in a host of fresh pleasures and awakening activities.

Our unrivalled range of quality holiday properties chosen for their unique character and setting allows you to uncover some of Europe's best kept secrets - fantastic hotels, trend-setting resorts, luxury cruise liners, comfortable trains - we're talking true style!

Accompanied by your own in-touch, fully professional tour manager, you'll discover dramatic cities rich in history and architectural splendor, alongside the inexhaustible contrasts of Europe's landscape - and all this at a price you can afford!

9 But the thrills don't stop there: with our unbeatable barage of included trips and bonuses you'll have a great time.

Welcome to your kind of holiday - the comfort of up-market, out-of-the ordinary accommodation, the company of others aged 18-35 with similar ideas of fun, the buzz of Europe, its romance and historical intrigue.

### DISCOUNT OFFERS: *Heading 2*

Offer one - save 10% **bold**

Book and pay in full for your Contiki 'European Panorama' or 'European Explorer' tour by 30 November and get 10% off the land content cost.

Friendly four - save 5% **bold**

Our 'Friendly Four' discount means a 5% saving per person when 4 or more people book at the same time.

Offer two - save 5% **bold**

After 30 November, book and pay in full at least 6 months before your Europe tour departs and get 5% off the land content cost.

*n.p.* NB: Savings only apply to tours at least 10 days long.

Second tour discount - save \$50 **bold**

Book 2 Contiki holidays (each at least 10 days long) at the same time and get \$50 off the cost of the second holiday.

### THE FACTS *Heading 2*

The meal deal *Heading 3*

Start off your day with an authentic European brekkie: coffee/tea, juice, rolls/croissants, butter and jam to set you up for the adventure ahead. We all have our own ideas on the right midday meal, so at lunchtime we give you the freedom to cater for yourself. **Dinner's a** *n.p.* different matter. Enjoy a buffet dinner or three-course meal with us at a choice of venues - hotel or local restaurant nearby. Some evenings you can join in one of our optional open invitations to try out the local specialities.

## Evidence guide

### *Elements and Performance Criteria*

<b>Element</b> <i>Elements describe the essential outcomes.</i>	<b>Performance Criteria</b> <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>	<b>Assessment tasks</b>
1. Prepare to produce word processed documents	1.1 Use safe work practices to ensure ergonomic, work organisation, energy and resource conservation requirements are met	Assessment task 1
	1.2 Identify document purpose, audience and presentation requirements, and clarify with relevant personnel as required	Assessment task 8
	1.3 Identify organisational and task requirements for text-based business documents to ensure consistency of style and image	Assessment task 8
2. Design word processed documents	2.1 Design document structure and layout to suit purpose, audience and information requirements of the task	Assessment tasks 5, 8 and 9
	2.2 Design document to enhance readability and appearance, and to meet organisational and task requirements for style and layout	Assessment tasks 5, 8 and 9
	2.3 Use style sheets and automatic functions to ensure consistency of design and layout	Assessment tasks 4, 5, 8 and 9
3. Add tables and other data	3.1 Insert a standard table into a document, changing cells to meet information requirements	Assessment tasks 7 and 10
	3.2 Insert and delete columns and rows as necessary	Assessment task 10
	3.3 Insert images and other data to meet required specifications	Assessment tasks 5, 9 and 10
4. Produce text documents	4.1 Use advanced software functions to enable efficient production of documents	Assessment tasks 5, 6 and 7
	4.2 Enter or import, and edit text and other data to meet required specifications	Assessment tasks 5, 8 and 10
	4.3 Preview, adjust and print documents in accordance with organisational and task requirements	Assessment tasks 5, 7, 9 and 10
	4.4 Name and store text documents, in accordance with organisational requirements and exit application without information loss/damage	Assessment tasks 5, 6, 7, 9 and 10

<b>Element</b> <i>Elements describe the essential outcomes.</i>	<b>Performance Criteria</b> <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>	<b>Assessment tasks</b>
	4.5 Prepare text documents within designated timelines and organisational requirements for speed and accuracy	Assessment task 3
	4.6 Use manuals, user documentation and online help to overcome problems with document design and production	Assessment tasks 2 and 10

### **Assessment Requirements v1.0**

#### **Performance Evidence**

Evidence of the ability to:	<b>Assessment tasks</b>
<ul style="list-style-type: none"> <li>adhere to organisational requirements and strategies when creating text documents including: <ul style="list-style-type: none"> <li>ergonomic requirements</li> <li>energy and resource requirements</li> </ul> </li> </ul>	Assessment task 1
<ul style="list-style-type: none"> <li>adhere closely to task requirements and required specifications by: <ul style="list-style-type: none"> <li>following designated timelines</li> <li>achieving consistency of style and image</li> <li>ensuring correct editing and style requirements</li> <li>adhering to designated timelines</li> </ul> </li> </ul>	Assessment tasks 3–10
<ul style="list-style-type: none"> <li>use advanced software features</li> </ul>	Assessment tasks 4–7, 9 and 10
<ul style="list-style-type: none"> <li>communicate effectively with personnel</li> </ul>	Assessment tasks 3 and 8
<ul style="list-style-type: none"> <li>overcome problems by referring to user documentation, manuals and online help.</li> </ul>	Assessment task 2

#### **Knowledge Evidence**

To complete the unit requirements safely and effectively, the individual must:	<b>Assessment tasks</b>
<ul style="list-style-type: none"> <li>outline various formatting styles and their impact on formatting, readability and appearance of documents</li> </ul>	Assessment tasks 5–10
<ul style="list-style-type: none"> <li>explain organisational requirements for ergonomics, work periods and breaks, and conservation techniques</li> </ul>	Assessment task 1
<ul style="list-style-type: none"> <li>describe purpose and contents of an organisational style guide</li> </ul>	Assessment tasks 3–10
<ul style="list-style-type: none"> <li>identify purpose, uses and functions of word processing software.</li> </ul>	Assessment tasks 4–10