

## **Produce digital text documents (Word 2019)**

This workbook supports BSBITU211 Produce digital text documents in the Business Services Training Package.

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# BSBITU211 Produce digital text documents

## Application

This unit describes the skills and knowledge required to digitally produce word documents in a workplace context.

It applies to individuals who perform a range of routine tasks in the workplace, using a limited range of practical skills and fundamental knowledge of word processing software/applications in a defined context, under direct supervision or with limited individual responsibility.

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

## 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>Page reference</b>
1. Prepare to produce documents	1.1 Adjust workspace, furniture and equipment to suit user ergonomic environments	10–11, 154
	1.2 Ensure workspace meets organisational work health and safety requirements for digital device operation, taking into account the type of device to be used	10–15
	1.3 Identify document purpose, audience and presentation requirements, and clarify with relevant personnel as required	18–22, 118, 155
	1.4 Identify organisational and task requirements for document layout and design	18–22, 118, 155
	1.5 Select most appropriate word processing application to produce document, in accordance with available resources and organisational policies	24–25
2. Produce documents digitally	2.1 Format document using appropriate application functions to adjust layout to meet information requirements, in accordance with organisational style and presentation requirements	Throughout workbook
	2.2 Use application features to identify and manipulate display options and controls	38–42, 130
	2.3 Use relevant help functions to overcome simple issues relating to document presentation and production	80
3. Finalise and present documents	3.1 Review and edit final document, and prepare for delivery in accordance with organisational and task requirements	33–34, 52–56, 63–64, 130, 152–153, 155
	3.2 Deliver document to relevant audience within designated timelines and in accordance with organisational requirements	17, 22, 63–65, 81, 118, 152–153, 155
	3.3 Name and store document appropriately in accordance with organisational requirements and exit application without information loss	Throughout workbook

## Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

<b>Skill</b>	<b>Description</b>	<b>Page reference</b>
Reading	<ul style="list-style-type: none"><li>Recognises textual information within organisational and task requirements to determine work requirements</li></ul>	Throughout workbook
Writing	<ul style="list-style-type: none"><li>Records numerical and textual information in accordance with requirements of task</li></ul>	Throughout workbook
Oral communication	<ul style="list-style-type: none"><li>Participates in a variety of spoken exchanges with relevant personnel in an effort to clarify document purpose, audience and presentation requirements</li></ul>	19, 155
Navigate the world of work	<ul style="list-style-type: none"><li>Recognises and follows explicit and implicit protocols and meets expectations associated with own role</li></ul>	9–15
Interact with others	<ul style="list-style-type: none"><li>Seeks guidance from more experienced work colleagues</li></ul>	16–20, 155
Get the work done	<ul style="list-style-type: none"><li>Understands functions and features of specific digital applications and uses these to perform work tasks</li></ul>	Throughout workbook

## Assessment for this Unit

This Unit is assessed by:

- demonstrating correct WHS practices
- recommending word processing applications
- using help facilities
- creating documents.

### Assessment Requirements

#### Performance Evidence

Evidence of the ability to:	Page reference
<ul style="list-style-type: none"><li>• follow correct ergonomic requirements and organisational policies and procedures</li></ul>	9–15
<ul style="list-style-type: none"><li>• produce digital documents that align to document purpose and appropriate to target audience</li></ul>	20, 118, 155
<ul style="list-style-type: none"><li>• adhere to organisational style manual when formatting documents</li></ul>	21–22, 134, 139, 154
<ul style="list-style-type: none"><li>• use relevant help functions to rectify simple document issues</li></ul>	80
<ul style="list-style-type: none"><li>• produce document in appropriate format for review</li></ul>	22, 63–64, 152–153, 155
<ul style="list-style-type: none"><li>• adhere to designated timelines when preparing documents</li></ul>	17, 81, 118, 155

#### Knowledge Evidence

The candidate must be able to demonstrate the following knowledge to effectively complete the tasks outlined in the elements and performance criteria of this unit, and to manage tasks and reasonably foreseeable contingencies in the context of the work role.	Page reference
<ul style="list-style-type: none"><li>• Key elements of basic formatting styles and their effect on formatting, readability and appearance of documents</li></ul>	Throughout workbook
<ul style="list-style-type: none"><li>• Key functions of word processing applications</li></ul>	22–24
<ul style="list-style-type: none"><li>• Key features of organisational requirements for ergonomics</li></ul>	9–15
<ul style="list-style-type: none"><li>• Key features of organisational style and presentation guide</li></ul>	21–22, 134, 139, 154

# SECTION 1: ORGANISATIONAL PROCEDURES

## Learning outcomes

At the end of this section you should be able to:

- understand ergonomics
- set up a workstation appropriately for the digital device being used
- understand health risks associated with computer use
- perform exercises to help prevent health issues
- use suitable document naming conventions
- apply timelines for document creation
- determine document requirements
- choose distribution methods for documents
- understand style guides
- plan a document.

## Conventions for personal names

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

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

When creating documents, current conventions should be applied.

<b>Current convention</b>	<b>Previous terms</b>
Given name	First name Christian name Forename
Family name	Last name Surname Byname

## Document requirements

When instructed to create a document, you should be provided with a description of what is required.

Requirements may include:

- type of document (letter, report, advertising flyer)
- purpose of the document (why it is being created)
- intended audience (the people who will read it)
- content of the document
- whether the document should be printed or delivered electronically
- where the digital file should be stored
- date when the document should be completed.

These requirements may be provided by your supervisor, a manager or a colleague. You may receive instructions in writing or during a conversation.

### Written instructions example

Please create a letter to send to the people shown in the visitors' books for open houses on 8 and 15 August. Use the company letterhead.

In the letter just thank them for visiting the open home at (street and area) on (date). Also mention that we are enclosing information regarding open homes for the month of September. End by saying that if we can be of further assistance to contact our office.

Deadline is end of today.

## Planning a document

When creating a simple document your planning may involve discussing your ideas with your colleagues or supervisor.

In most cases it is more efficient to draft the document in the word processing application and ask for feedback.

### Purpose

The document purpose is the reason for the document; to inform, to provide instructions or to persuade the audience. The purpose will determine the content, layout and language used. For example, a document that provides instructions may include a list of short numbered sentences and an advertisement will use descriptive words and images.

### Audience

You need to know who will be reading the document so you can write using the tone suitable for that audience. Aspects you may need to consider are:

Requirements	Why will they be reading your document? What information will they need?
Age	You may be able to use slang with a younger audience, but it would not be appropriate with an older audience. Simple words and layouts can be used for an audience of children (or parents of children).
Knowledge	If you are writing a report for a subject-specific audience, you can use technical terms which you would not use with the general public.

### Example plan



If you are unsure of the requirements you have been tasked with, a simple plan as below may make things clearer.

Purpose	Advertise the library gala
Audience	Library patrons – children to senior citizens
Design	Visually interesting and engaging Must use library style guide
Format	One-page A5 flyer
Text	Date Time Location List of events that will take place Info supplied by Catherine
Deadline	Next Friday Draft to be printed and supplied to Catherine for checking by close Thursday

You can show this plan to your supervisor to make sure you have understood your task.

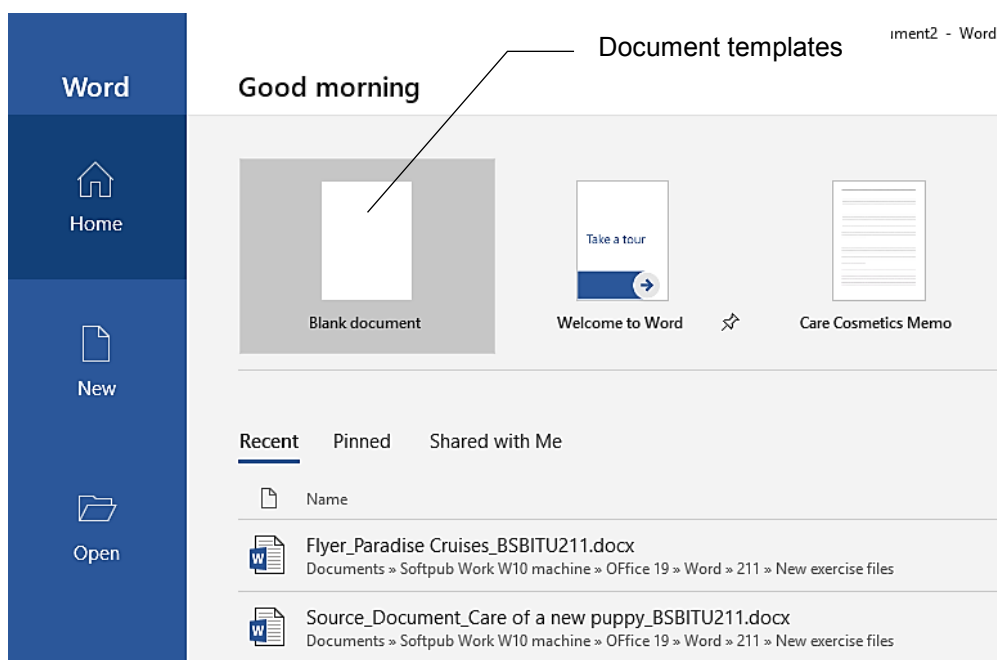
# Starting Word

## Exercise 3

1. Click on the Start button .
2. Scroll down the list of installed applications.
3. Click on  to open Word.

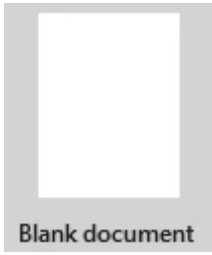
## Startup screen

When Word is opened, the Startup screen displays. This screen lists recently accessed documents along with a range of templates which you can choose from when creating a new document.



One of the templates is called Blank document.

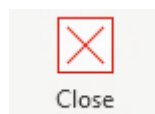
## Exercise 4

1. With the Word Startup screen displayed click on Blank document . A new document will be created based on the Blank document template.
2. Leave the blank document open.

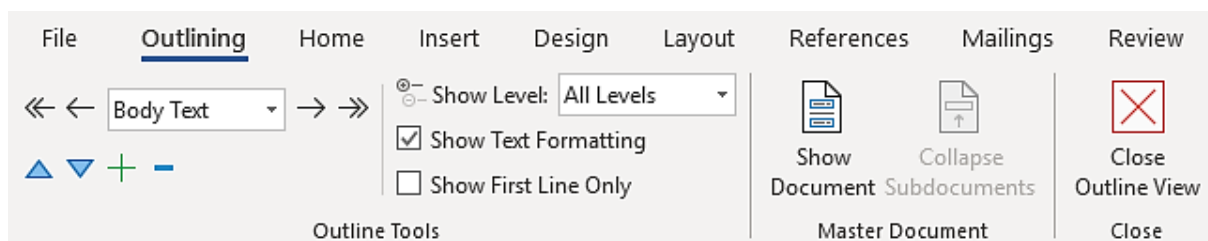


## Outline

Outline displays text based on what style has been applied to it. It shows the levels of heading styles that have been used throughout the document. Heading styles can be changed and topics can be rearranged in this view.



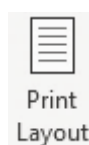
Outline View includes the Outlining Ribbon. Click on **Close Outline View** to close.



## + Italy

### + When to visit

- The best months for sightseeing are April, May, June, September and October, but there are some traps. For example, if you visit major art cities over Easter you will be among even larger than usual crowds of foreign tourists. From March through May, bus loads of schoolchildren take part in excursions to cities of historical and artistic interest.
- 
- If possible, avoid travelling around Italy in August. The crowds can be too much – especially as most of the locals are on the move and cramming roads, trains and planes on their way to the sea and mountain resorts.
- 
- June and September are among the best months to visit resorts. They are all open, but less crowded.
- 
- The climate is hotter the further south you go, but there is plenty of coastline and the shore breezes do help. The hottest months are July and August and brief afternoon thunderstorms are common inland. Winters tend to be mild, but prepare for some rain.



3. After looking at the different views click on **Print Layout** to display Print Layout.
4. Leave the document open for the next exercise.

## Undo and Redo

Ctrl Z Click on the Undo button  on the Quick Access Toolbar to undo your last action.

Ctrl Y The Redo button  is used to reverse the Undo command.

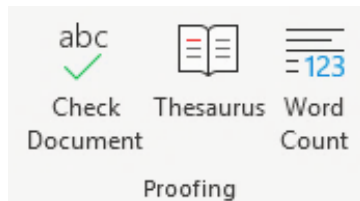
### Exercise 21

1. Using **Exercise 17...** press Ctrl End to move to the end of the document.
2. Press Enter twice and type: **Visit Venice – it's a fun city.**
3. Select the text you just typed and press the Delete key.

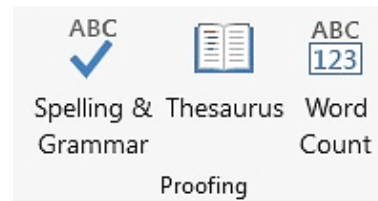
## Proofing tools

Tools for checking spelling and grammar vary between Word 365 and the professional desktop version.

Proofing tools are located in the Proofing Group in the Review Ribbon.



Word 365



Word Professional Plus 2019

The Check Document/Spelling & Grammar tools check for a range of issues including:

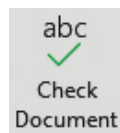
- spelling errors
- punctuation errors, e.g. incorrect spacing
- grammatical errors, e.g. 'a' before a vowel rather than 'an'.

Different exercise instructions are provided below. Complete Exercise 29 or Exercise 30 depending on which version of Word you are using.

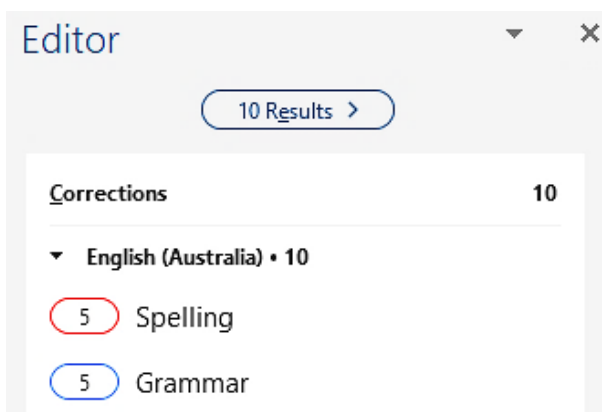
### Using proofing tools in Word 365

#### Exercise 29

1. Open the file **Spell Bookshop report** from the *978-1-921971-32-7 BSBITU211 exercise files* folder.
2. Save As the document in your working folder following workbook procedures.
3. Click on the Review Ribbon tab.



- F7 4. Click on the Check Document button. The Editor pane will display on the right. This provides a summary of the issues identified with the document.

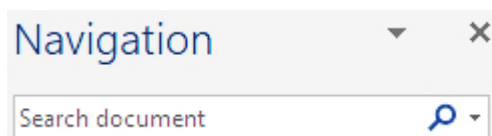


# Find and Replace

The Navigation Pane is used to perform basic searches for text in a document.

## Exercise 39

1. Open the file **Home and contents insurance** from the *978-1-921971-32-7 BSBITU211 exercise files* folder.
2. Save As the document in your working folder following workbook procedures.
3. Check the Navigation Pane is displayed. If it is not, display the View Ribbon and put a tick in the Navigation Pane check box  **Navigation Pane**.
4. Click in the *Search document* box.







5. Type: **60%**  
The occurrence of the term *60%* will be highlighted in the text.
6. Change the figure in the text to **70%**. The highlighting will be removed.
7. Save the document and leave it open for the next exercise.

## Advanced find

The Find button in the Editing Group provides options for advanced searching.

## Exercise 40

1. Using **Exercise 39...** check the Home Ribbon is displayed.
2. Click on the  at the right of the Find button **Find** in the Editing Group.
3. Select  **Advanced Find...**. The Find and Replace dialog box will display with the Find tab selected at the top.
4. Click on  to extend the dialog box to display additional options.
5. Select the text in the *Find what:* box and type: **Earthquake and Natural Disaster Cover**
6. Click in the *Match case* check box  **Match case**.
7. Click on the Find Next button OR press Enter. The text will be selected.
8. Click on Cancel to close the dialog box.
9. Press Shift F3 to change the selected heading to upper case.
10. Move the *Earthquake and Natural Disaster Cover* paragraph (including the heading) to the bottom of the page.
11. Click in the margin to deselect the text.
12. Click on  and select  **Advanced Find...**.
13. In the *Find what:* box, type: **discount**
14. Remove the tick from the *Match case* check box.
15. Press Enter. The word will be found.
16. Click on the Cancel button.
17. Delete the word *discount*.

# Horizontal alignment




The Paragraph Group on the Home Ribbon provides options for horizontal alignment.



The following illustrates how text is affected when the alignment buttons are used:

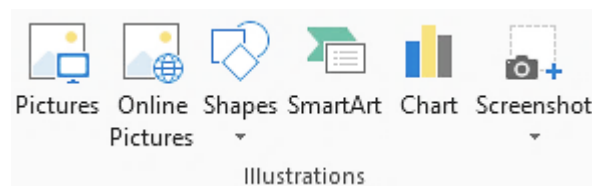
Align Left	Center	Align Right	Justify
The text typed in this box is left aligned; the right margin is uneven.	Centred text is frequently used for headings. It makes text stand out.	Right aligned text is sometimes used for the return address in a business letter.	This text is justified alignment where the text is even at the left and right margins.

## Exercise 47

1. Using **Exercise 44...** check the text *Kresta Café and Craft Shop* is selected.
2. From the Paragraph Group on the Home Ribbon click on the Align Right button .
3. Click on the Align Left button .
4. Click on the Center button .
5. Centre the *Mt Hobson Lookout* text.
6. Make the other text, font and paragraph formatting changes to the advertisement as shown on page 72. Add blank lines if required to space out the document appropriately.
7. Save the document and leave it open for the next exercise.

# Inserting pictures

Pictures are inserted using the Illustrations Group on the Insert Ribbon.




## Exercise 48

In this exercise you will insert images supplied with your exercise files.

1. Using **Exercise 44...** click anywhere in the document and display the Insert Ribbon.



2. Click on the Pictures button . The Insert Picture dialog box will display.
3. Use the Navigation Pane to navigate to the *978-1-921971-32-7 BSBITU211 exercise files* folder.
4. Double click on the file **Cafe**.