Design and produce digital text documents (Word 2019)

This workbook supports BSBITU313 Design and produce digital text documents in the Business Services Training Package.

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BSBITU313 Design and produce digital text documents

Application

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

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

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

Elements and Performance Criteria

Element *Elements describe the essential outcomes.*	Performance Criteria *Performance criteria describe the performance needed to demonstrate achievement of the element.*	Page reference
1. Prepare to produce documents	1.1 Adjust workspace, furniture and equipment to suit user ergonomic environments	10–12
	1.2 Ensure workspace meets organisational requirements related to work health and safety, and energy and resource conservation, taking into account the type of digital device to be used	10–16
	1.3 Identify document purpose, audience and presentation requirements, and clarify with relevant personnel as required	19–23, 104, 140, 159, 193
	1.4 Identify organisational and task requirements for text-based business documents to ensure consistency of style and image	22–23, 86, 104, 140, 159, 193
	1.5 Select most appropriate word processing application to produce document, in accordance with available resources and organisational policies	27–28
2. Design documents digitally	2.1 Design document structure and layout to suit purpose, audience and information requirements of task	Throughout workbook
	2.2 Design document to enhance readability and appearance, and to meet organisational and task requirements for style and layout	Throughout workbook
	2.3 Use available application functions to ensure consistency of design and layout, adhering to organisational and task requirements	Throughout workbook
	2.4 Insert a standard table into document, changing cells, columns, and rows as necessary to meet information requirements	39–48, 141–153, 158–160, 174–175, 186
	2.5 Insert and format visual elements (including, for example, images or icons) to meet organisational and task requirements for style and layout	73–75, 94–103, 135–139

Element *Elements describe the essential outcomes.*	Performance Criteria *Performance criteria describe the performance needed to demonstrate achievement of the element.*	Page reference
3. Produce text documents digitally	3.1 Use intermediate-level application functions to enable efficient production of digital text documents	Throughout workbook
	3.2 Enter or import, and edit text and other data to meet task requirements	Throughout workbook
	3.3 Preview, adjust and prepare documents for delivery in accordance with organisational and task requirements	Throughout workbook
	3.4 Name and store document, in accordance with organisational requirements and exit application without information loss/damage	Throughout workbook
	3.5 Deliver document within designated timelines and organisational requirements for speed and accuracy	Throughout workbook
	3.6 Use relevant help functions to overcome intermediate issues with document design and production	68

Foundation Skills

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

Skill	Description	Page reference
Reading	• Recognises and interprets textual information from a range of sources to determine and adhere to requirements	Throughout workbook
Writing	• 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	• Uses specific and direct language, and listening and questioning techniques to clarify requirements	20–22, 140, 193
Navigate the world of work	• Recognises and follows explicit and implicit protocols and meets expectations associated with own role	Throughout workbook
Interact with others	• Collaborates with others to achieve joint outcomes	20–22, 28, 140, 193
Get the work done	• Uses advanced features within digital applications to address routine and complex work tasks	Throughout workbook

Assessment for this Unit

This Unit is assessed by:

- recommending word processing applications
- demonstrating correct WHS practices
- using help facilities
- creating a logo
- formatting a document
- creating a letter template
- creating a mail merge document
- designing and creating a newsletter.

Assessment Requirements

Performance Evidence

Evidence of the ability to:	Page reference
• follow correct ergonomic and conservation requirements, and relevant organisational policies and procedures	10–16
• design and produce digital text documents that align to document purpose and are appropriate to target audience	Throughout workbook
• adhere closely to task requirements and required specifications by: • following designated timelines • achieving consistency of style and image • ensuring correct editing and style requirements • adhering to designated timelines	Throughout workbook
• use application features for intermediate-level document design	Throughout workbook
• communicate effectively with relevant personnel	20–22, 28, 140, 193
• overcome problems by referring to application help functions	68

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
• Key elements of intermediate-level formatting styles and their impact on formatting, readability and appearance of documents	Throughout workbook
• Key strengths and limitations of various word processing applications	27–28
• Key features of organisational requirements for ergonomics, work periods and breaks, and conservation techniques	10–16
• Key features relating to purpose and contents of organisational style guide.	22–25, 86, 104, 140, 159, 193

Energy and resource conservation

All Australian businesses should have procedures in place to conserve resources and energy. The three key actions are:

Reduce	The best way to conserve resources is not to use them or to use them less. Many organisations are moving towards a paperless office where all documents are viewed and shared electronically rather than being printed. If you do need to print a document, print on both sides of the paper.
	Reducing energy use is another important conservation measure.
	• Buy energy efficient office and computing equipment. Look for the energy rating label.
	• Use energy efficient light bulbs and use motion sensors to turn on lights when needed.
	• Switch off heaters and airconditioners at the end of the day.
	• Turn off desktop computers, printers and photocopiers at the end of the day.
	• Set computers to go into 'sleep' mode when not in use.
	Reducing resource use not only helps save the planet, it also saves the organisation money.
	This workbook practises waste reduction by instructing completed exercises to be submitted electronically.
Reuse	If you need to use an item, try and use it more than once. If a document has been printed on one side only, use the other side for notepaper. When using a document shredder, use the shredded paper as packing material.
	Require all employees to bring a reusable mug rather than supplying disposable cups.
Recycle	There is a wide range of items that can be recycled. Common items used in an office include:
	• paper (including cardboard and envelopes)
	• ink and toner cartridges
	• batteries
	• food cans/tins/bottles.
	Organisations should have a recycling system, e.g. bins for different recyclable products. Paper with confidential information printed on it should be shredded before recycling.
	Organisations can also buy products made from recycled material.

Oral instructions

Document requirements might be provided in a conversation with a supervisor or colleague. If complex instructions are provided orally, take notes so you do not forget any important details.

Once the person has finished speaking, repeat the information back using your own words. This is referred to as **paraphrasing** and demonstrates that you have understood the information you have been given.

Asking for clarification

If at any time you are unsure about any instruction you have been given, ask for more information. If you do not understand an instruction, ask for it to be explained a different way. It is much better to ask for clarification straight away. Creating the document and then finding you have misunderstood the requirements wastes everyone's time.

Discussing requirements with a group

Large documents will sometimes have several contributors. For example, a business plan describing business goals will have input from several people. You may be required to attend a meeting to plan a document.

- Always take notes, not just about your job, but what everyone else will be responsible for. This way if you have questions, you can ask the relevant person later.

- Listen carefully to all other speakers and give them your full attention.

- Do not talk over other people.

- When it is your turn to speak, be succinct and stay on topic.

- Be assertive. If you have a good idea, present it to the group clearly.

- Ask questions. You may not be the only person who has that question. You may raise a point that no-one has thought of.

It can also be useful to discuss document requirements with more experienced colleagues and ask for guidance.

Planning a document

When creating a simple document your planning may involve discussing your ideas with your colleagues or supervisor. If you are creating a complex document, you may need to create a more detailed plan.

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	Advertising services of Direct Legal Services
Audience	People seeking legal services
Design	Format should be formal but visually engaging Must use company colours - navy blue and black
Format	One-page A4 flyer
Text	Company name Contact details Professional services offered Info supplied by Su-Yee Use provided logo image (DLSlogo.gif)

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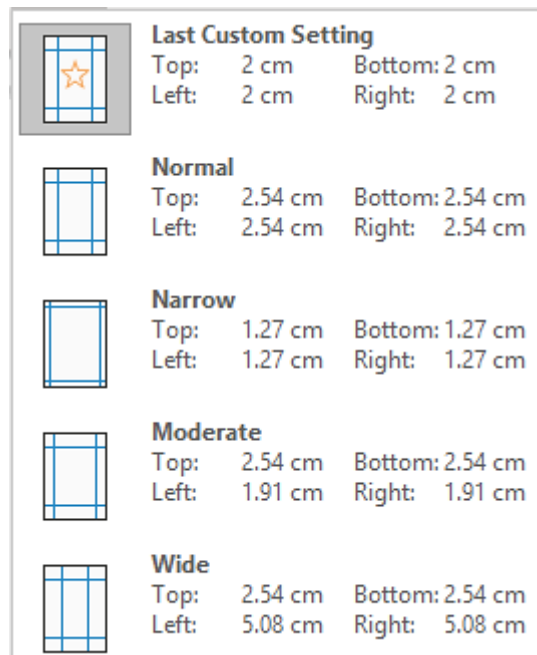
Page setup

Margins

The margin measurements determine how much white space is displayed around the document.

### Changing margins with the Margins button
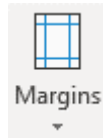
Click on the Margins button in the Page Setup Group. A list of predefined margins will display. Click on a margin option to apply it to your document.

Changing margins with the Page Setup dialog box

1. Click on the Page Setup Dialog Box Launcher button to display the Page Setup dialog box.

2. Click on the Margins tab, change margins as necessary then click on OK.
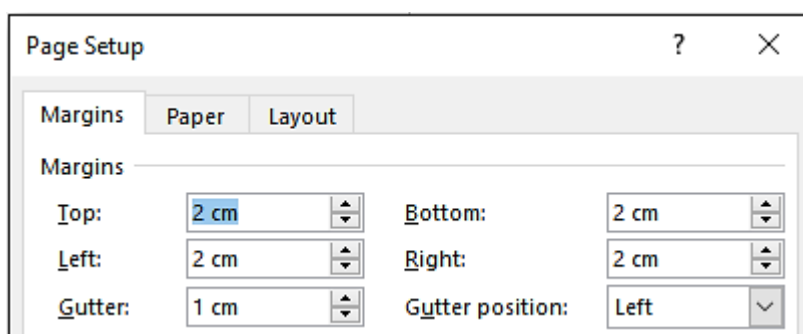
Creating PDF documents

It is possible to save your completed document in portable document format (PDF). A PDF document can be emailed or downloaded from a website and opened by anyone; all they need is a PDF reader which can be downloaded from the internet.

Supplying a document as a PDF can have several benefits:

- PDF documents are harder to edit than other formats, stopping readers from accidentally changing documents.

- A PDF document retains its formatting, so you can be sure that your audience will see your document the same way you do.

- PDF files are safer to email than Word documents as they cannot hide malware.

- A PDF can be saved in two formats: *Standard* for printing and *Minimum size* for electronic delivery.

Exercise 26

1. Open the file **Xmas gift** from your working folder.

2. Click on File . Then click on Export .

3. Check Create PDF/XPS Document is selected and click on Create PDF/XPS . The Publish as PDF or XPS dialog box will display.

4. Check PDF is selected from the *Save as type:* drop-down list.

5. Add a tick to the *Open file after publishing* check box.

Save as type: PDF (*.pdf)
☑ Open file after publishing
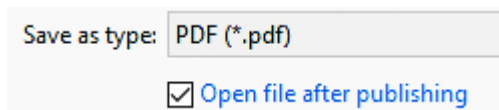
6. Click on Publish . The document will be published as a PDF document.

7. View the PDF document and then close.

If your device does not have an app installed for opening PDF files, you will asked whether you want to open the document in an internet browser.

8. Close the Word document clicking on Don't Save if asked to save changes.