Design and develop complex text documents (Word 2019)

This workbook supports BSBITU401 Design and develop complex text documents in the Business Services Training Package.

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Sample pages

BSBITU401 Design and develop complex text documents

Application

This unit describes the skills and knowledge required to design and develop business documents using complex technical features of word processing software.

It applies to individuals who work in a range of business environments and have skills which may be applied in the provision of administrative support within an enterprise, or by technical/knowledge experts responsible for producing their own word processed 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 word processed documents	1.1 Use safe work practices to ensure ergonomic, work organisation, energy and resource conservation requirements are met	10–17
	1.2 Identify document purpose, audience and presentation requirements, and clarify with relevant personnel as required	20–22, 74, 241–242
	1.3 Identify organisational requirements for text-based business documents to ensure consistency of style and image	20–26, 74, 241–242
	1.4 Evaluate complex technical functions of software for its usefulness in fulfilling requirements of the task	Throughout workbook
	1.5 Match document requirements with software functions to provide efficient production of documents	Throughout workbook
2 Design complex documents	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 complex software functions to enable efficient manipulation of information and other material, and ensure consistency of design and layout	Throughout workbook
	2.4 Use manuals, user documentation and online help to overcome problems with document design and production	73

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Element Elements describe the essential outcomes.	**Performance Criteria** Performance criteria describe the performance needed to demonstrate achievement of the element.	**Page reference**
3 Add complex tables and other data	3.1 Insert a standard table into document, changing cells to meet information requirements	89–104
	3.2 Format rows and columns as required	89–104
	3.3 Insert images and other data, formatting as required	46–59, 62, 65, 124–129, 224–225
4 Produce documents	4.1 Use complex operations to develop documents, and achieve required results	Throughout workbook
	4.2 Preview, adjust and print documents in accordance with organisational and task requirements	113–117, 136, 136, 142, 145, 169, 185, 189–190, 242 251
	4.3 Name and store documents in accordance with organisational requirements and exit application without information loss/damage	Throughout workbook
	4.4 Prepare documents within designated timelines and for speed and accuracy	117

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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	Page reference
Reading	1.3, 2.2, 2.4, 4.3, 4.4	• Recognises and interprets textual information from a range of resources to determine and confirm requirements and to assist with document issues	Throughout workbook
Writing	2.1-2.4, 3.3, 4.2-4.4,	• Develops material using required format and incorporating technical functions to meet business needs	Throughout workbook
Oral communication	1.2	• Uses specific and relevant language to confirm understanding of requirements and listens carefully to verbal instructions and discussions	20–21, 74, 241–242
Numeracy	1.4, 3.3	• Recognises and inputs numerical information according to requirements	103–109
Navigate the world of work	1.1-1.3, 1.5, 2.1-2.3, 3.1-3.3, 4.1-4.4	• 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	20, 74, 130, 241–242
Get the work done	1.4, 1.5, 2.1-2.4, 3.1-3.3, 4.1-4.4	• Applies formal processes when planning more complex/unfamiliar tasks, producing plans with logically sequenced steps	21, 74, 241–242
		• Uses advanced features within applications to access, store, organise data and perform routine and complex work tasks	Throughout workbook

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Assessment for this Unit

This Unit is assessed by:

- demonstrating correct WHS practices
- using help facilities
- creating four complex documents

Assessment Requirements v1.0

Performance Evidence

Evidence of the ability to:	Page reference

• follow organisational and safe work practices including:
  • ergonomic requirements
  • energy and resource conservation techniques
	10–17

• adhere to organisational requirements for:
  • producing documents within designated timelines
  • naming and storing documents
	18–19

• adhere to task requirements when producing complex documents including:
  • using appropriate styles and layout consistently throughout the document
  • using correct formatting and document structure
	Throughout workbook

• resolve issues by referring to user documentation and online help	73
• use appropriate data storage options	Throughout workbook
• apply knowledge of complex operation and functions of industry software applications	Throughout workbook
• communicate with relevant personal.	20–21, 74, 242

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:	Page reference
• outline various formatting styles and their effect on formatting, readability and appearance of documents	24–26
• explain organisational requirements for ergonomics, work periods and breaks, and conservation techniques	10–17
• describe purpose and contents of an organisational style guide.	22–23

Sample pages

BSBTEC401 Design and produce complex text documents

At the time of writing this workbook BSBITU401 Design and develop complex text documents was under review and a draft BSBTEC401 Design and produce complex text documents was circulated for industry feedback. This workbook has been written to include additional requirements in that draft.

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Spelling and grammar in this workbook

At times different spellings of one word are used in this workbook.

References to buttons, groups, tabs and other features are spelt the same way as they appear in the application so instructions resemble the application as closely as possible.

In all other instances Australian spelling is followed, e.g. the Font Color button is used to change the colour of selected text.

Images used in this book

Your monitor size and resolution will determine how your version of Word will display. There will be variation in the number of buttons shown on the Ribbon and the format of some buttons, e.g.:

- on a bigger screen the Header button displays as

- on a smaller screen it displays as

.

To avoid eyestrain Office applications use soft images for components such as buttons, Ribbons and dialog boxes. Screenshots have been enhanced in this workbook as much as possible, however sometimes they may still appear out of focus.

Microsoft Office 2019 and Office 365

Office 2019 comes in two versions:

- one-time purchase version Professional Plus 2019
- Office 365 subscription version.

The images for this workbook have been taken from Word 365. The workbook is fully compliant with Professional Plus 2019, however some images will display differently, e.g.:

- in Word 365 the New button displays as

- in Professional Plus 2019 the button displays as

.

Where the two versions deviate significantly, instructions are provided for both.

Shortcut key combinations

Where relevant shortcut key combinations are shown in the left margins of this book, e.g. where using the Open button is instructed in the text, the shortcut key combination is included:

Ctrl O

To use the shortcut key combination press and hold down the keys in the order given, i.e. hold down the Ctrl key then press the O key.

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Quick Access Toolbar

The Quick Access Toolbar located in the top left corner of the window contains commands to Save, Undo and Redo. Frequently used commands can be added to this toolbar.

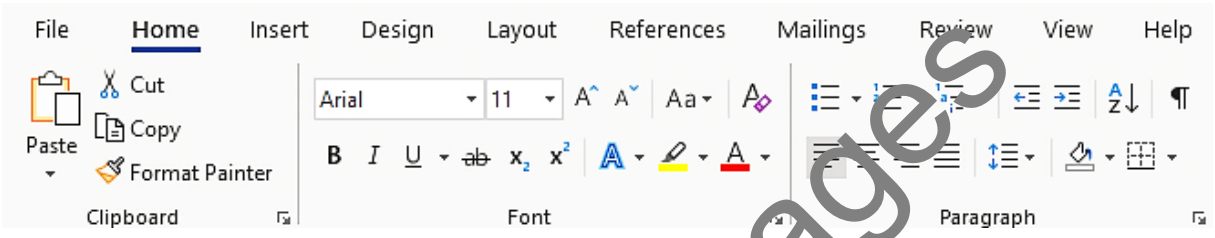
The AutoSave option is only available if you are using Word 365 and have access to the cloud for file storage.

File tab

Word has a File tab which is positioned on the left of the Ribbon. Clicking on the File tab opens **Backstage view**. Backstage view is designed to help you manage files, allowing you to open, close, save and print documents.

Ribbon

The Ribbon provides access to all the tools required for working with a document.



Ribbon tabs

The Ribbon has a series of tabs along the top. The tabs shown will vary depending on the version of Word you are using and how it has been configured.

Click on the tab to display the Ribbon required.

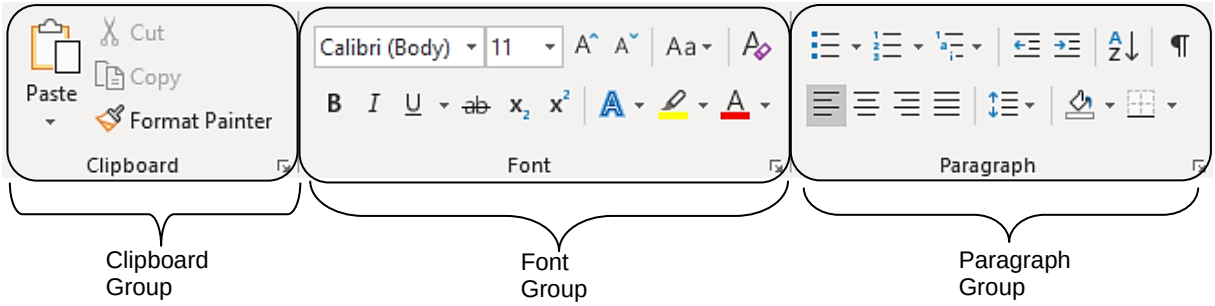
Context sensitive tabs display when the tools are needed, e.g. the Table tabs appears when you are working on a table and disappear again when you have finished.

Word 365

Word Professional Plus 2019

Groups

Ribbons are split into groups, e.g. Font Group. Each Group contains command buttons appropriate to a particular action; the font formatting tools are in the Font Group.



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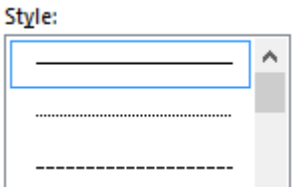
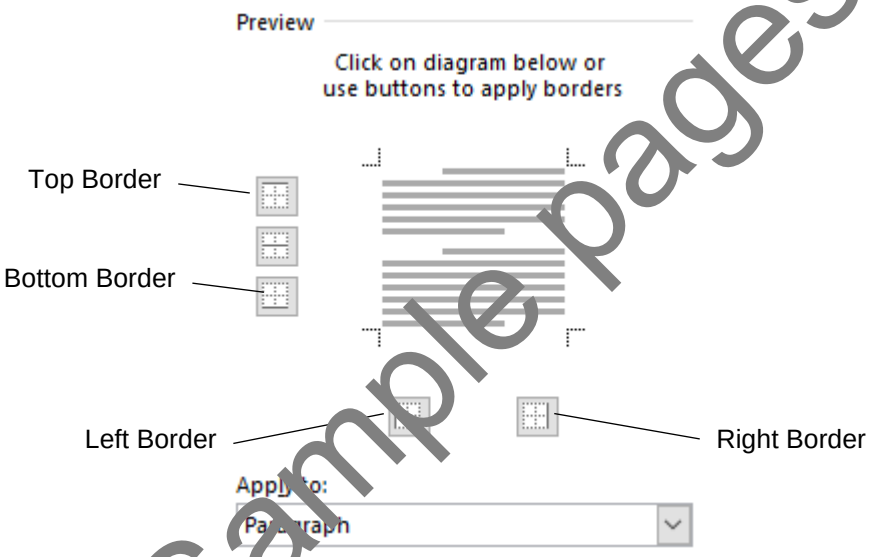
Borders and shading

Adding border lines to paragraphs

1. Click within the paragraph requiring a border.
2. With the Home Ribbon displayed click on the of the Borders and Shading button and select Borders and Shading... . The Borders and Shading dialog box will display.
3. Select the style of line required from the *Style:* list.



4. Click on the buttons shown below to apply the line style, e.g. clicking on and would apply a border line above and below the paragraph.



5. Check Paragraph is selected from the *Apply to:* drop-down list.
6. Click on OK.
7. Change the left and right indents as required to indent the bordered paragraph from the margins.

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Page borders

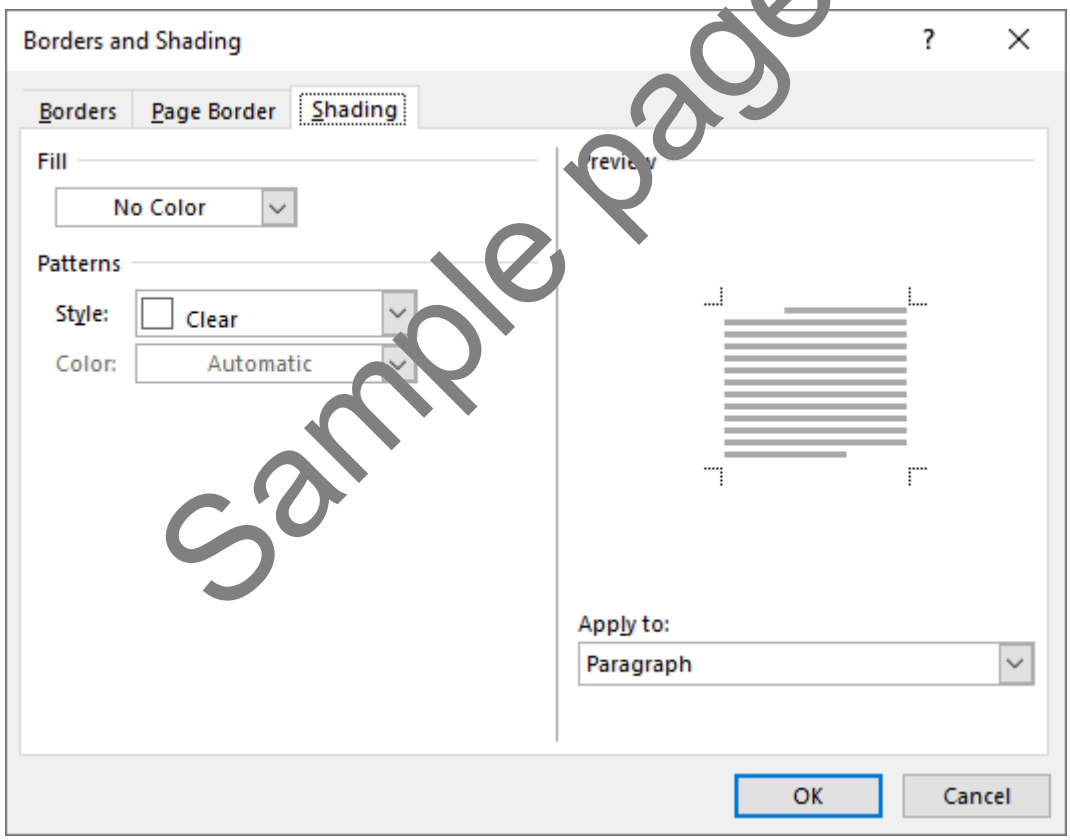
The technique to apply specific borders to a paragraph can also be used to apply the page border.

1. From the Design Ribbon click on the Page Borders button

. The Borders and Shading dialog box will display with the Page Border tab displayed.
2. Select the style of line required from the *Style:* list.
3. Click on the buttons required to apply the line, e.g. clicking on and would apply page border lines at the top and bottom of the page only.
4. Check Whole Document is selected from the *Apply to:* drop-down list.
5. Click on OK.

Applying shading to a paragraph

1. Click in the paragraph requiring shading.
2. Display the Borders and Shading dialog box and click on the Shading tab.



3. Select the colour required from the *Fill* drop-down list.
4. Check Paragraph is selected from the *Apply to:* drop-down list.
5. Click on OK.

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SmartArt

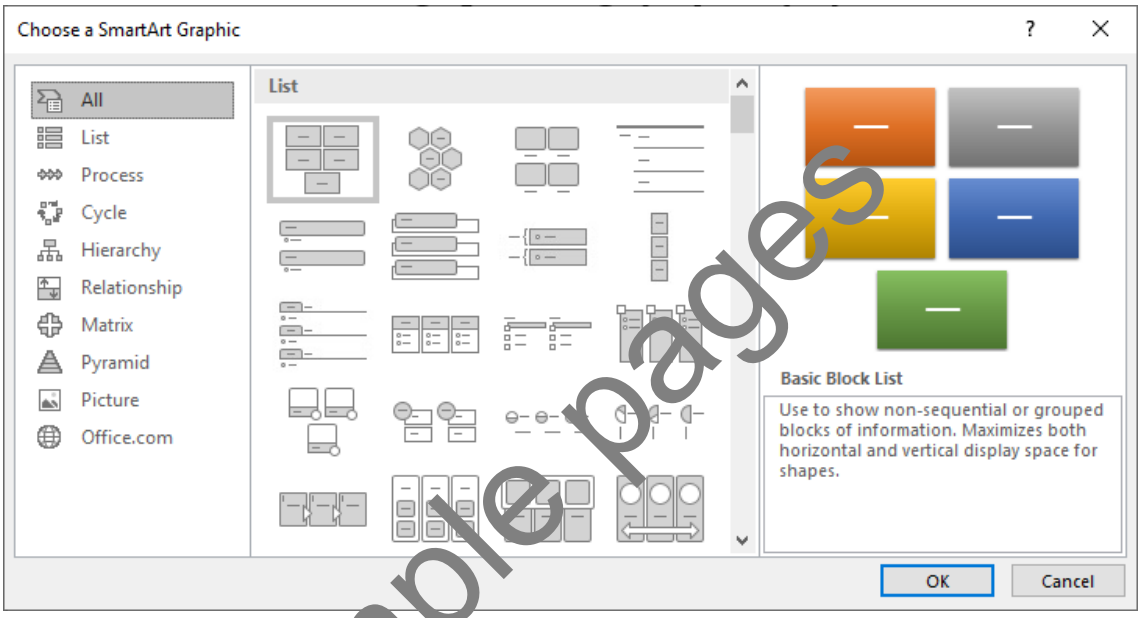
The SmartArt tool is used to insert different types of diagrams into a document.

Organisational chart

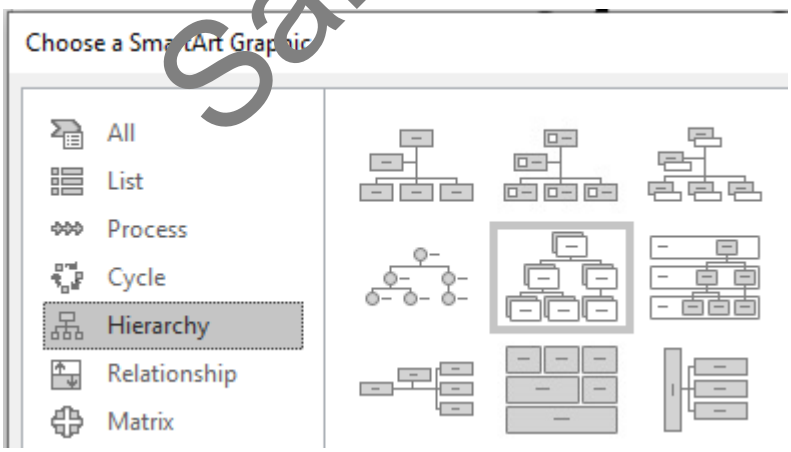
Exercise 21

1. In a new document type: **Software Solutions Ltd** and press Enter. Format the heading to 22 pt, centred, bold.
2. Press Ctrl End to move to the next line. On the Insert Ribbon click on the SmartArt button

. The Choose a SmartArt Graphic dialog box will display.



3. Click on Hierarchy from the list on the left.
4. Select Hierarchy from the list on the right.



5. Click on OK. The diagram will be inserted into the document and the SmartArt Ribbons will display.
6. If the Text pane is displayed, click on the Close button to turn it off.

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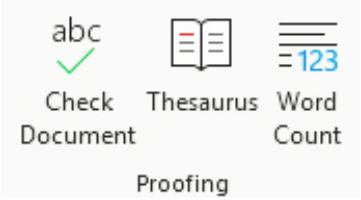
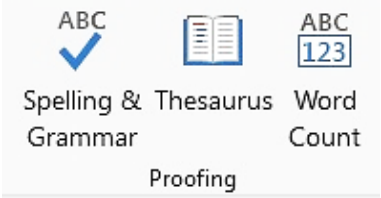
Proofing tools

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'.

Note

Sometimes Word indicates correct Australian spelling as errors and offers US spelling even when the dictionary is set to English (Australia), e.g. customise → customize, licence → license. If you are not sure which spelling is correct, refer to the Macquarie dictionary.

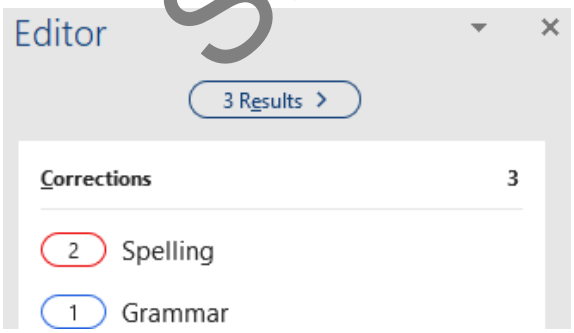
Using proofing tools in Word 365

Exercise 40

1. Open the file **Choosing a cat** from the *978-1-74971-50-1 BSBITU401 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 in the document.

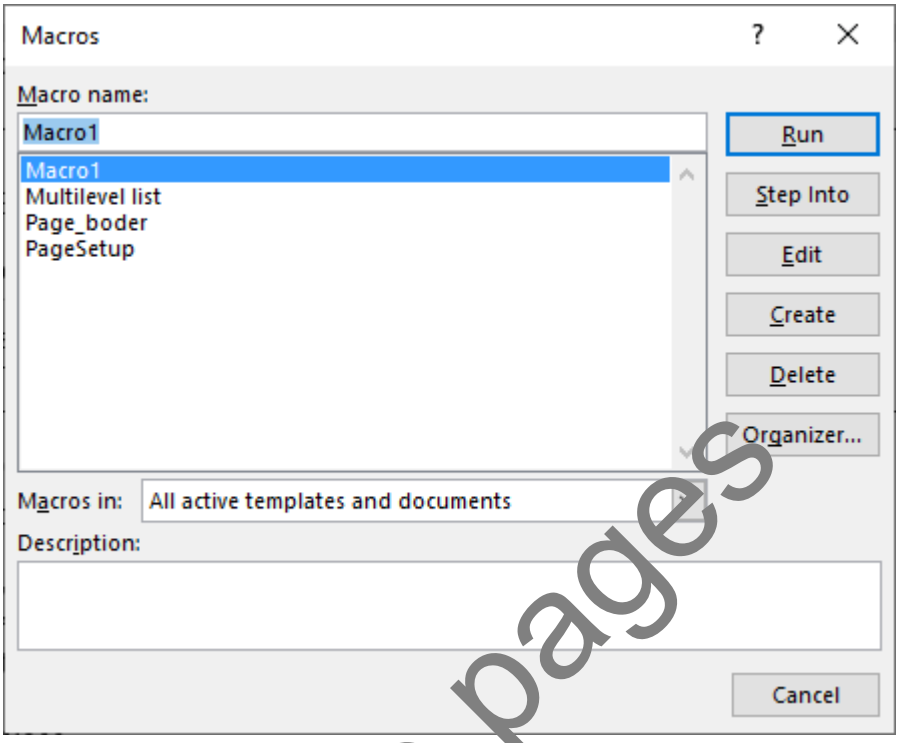


Sample pages

Deleting a macro

To delete a macro click on the top half of

. The Macros dialog box will display.



Select the name of the macro and click on

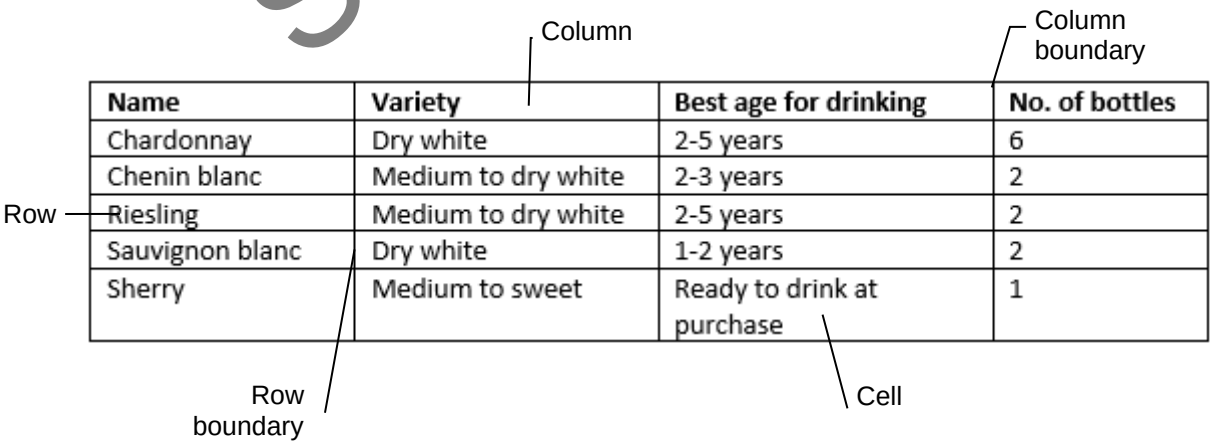
. Click on Yes then click on Close.

Sample pages

Tables

Tables are used to display data in a professional, ordered manner. A table is divided into cells which can contain text, numbers, graphics and even formulas to perform calculations.

A table is made up of columns and rows, and each individual rectangle is called a cell.



Name	Variety	Best age for drinking	No. of bottles
Chardonnay	Dry white	2-5 years	6
Chenin blanc	Medium to dry white	2-3 years	2
Riesling	Medium to dry white	2-5 years	2
Sauvignon blanc	Dry white	1-2 years	2
Sherry	Medium to sweet	Ready to drink at purchase	1

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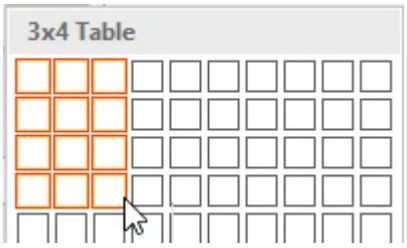
Inserting a table

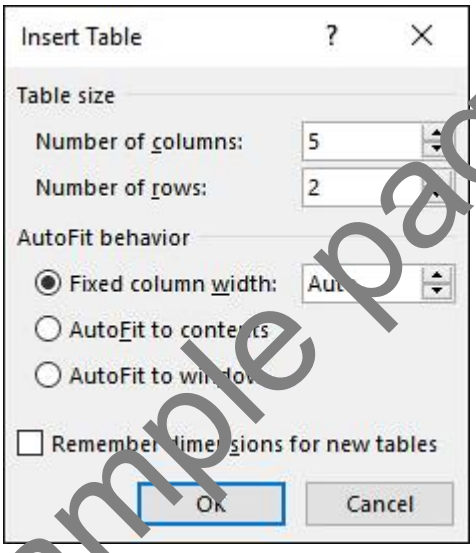
The Table button in the Tables Group on the Insert Ribbon is used to insert a table.

Click on the button and select the number of cells required for your table as shown below.



The table will automatically be inserted.

Alternatively, select Insert Table... from the Table button menu. The Insert Table dialog box will display. Enter the *Number of columns:* and *Number of rows:* and click OK.



Sample pages

Table Ribbon tabs

When a table is created the Table tabs display on the Ribbon.

Word 365

Word Professional Plus 2019

The Table Design Ribbon contains tools for controlling how the table looks. The Layout Ribbon allows you to change the physical layout of the table.

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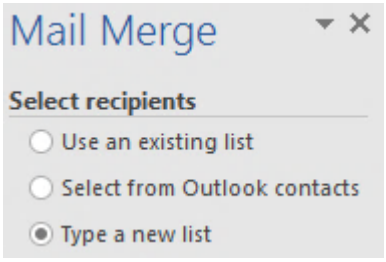
Setting up the data source file

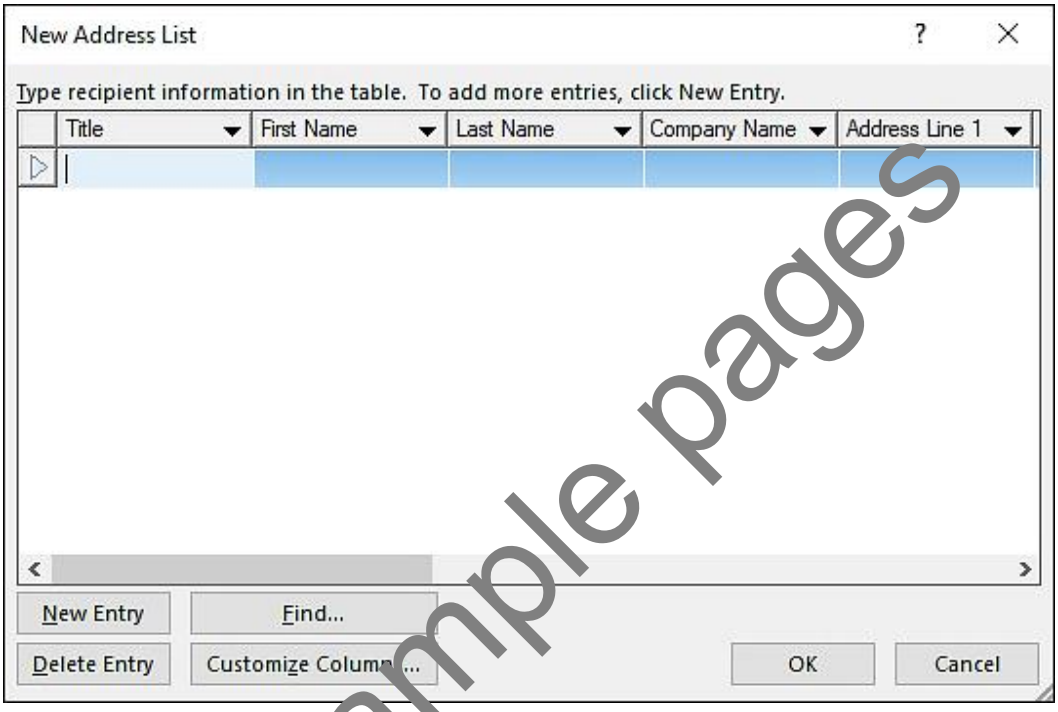
Exercise 85

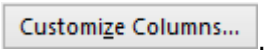
1. Select the *Type a new list* option at the top of the task pane.



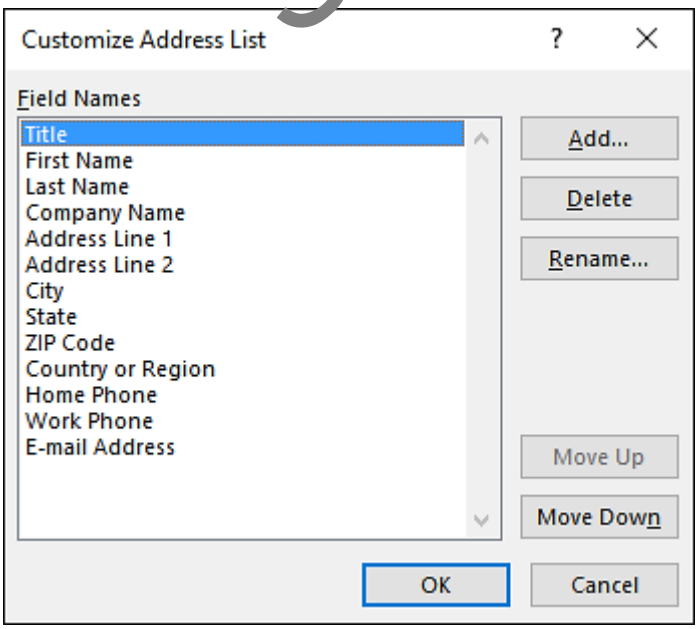
2. Click on

under the Type a new list heading.



3. Fields for the mail merge need to be set up. Click on 

. The Customize Address List dialog box will display.



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