## Use business software applications

This workbook supports BSBTEC201 Use business software applications in the Business Services Training Package.


## Author

Software Publications writing team



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# BSBTEC201 Use business software applications

## Application

This unit describes the skills and knowledge required to select and use software and organise electronic information and data.

This unit applies to those who use a limited range of practical skills with a fundamental knowledge of equipment use and the organisation of data in a defined context, under direct supervision or with limited individual responsibility.

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

## Elements and Performance Criteria

| **Element**<br>*Elements describe the essential outcomes.* | **Performance Criteria**<br>*Performance criteria describe the performance needed to demonstrate achievement of the element.* | **Page reference** |
|---|---|---|
| 1. Select and prepare to use technology | 1.1 Identify task purpose, audience, format and presentation requirements, and clarify with relevant personnel where required | 28–30 |
| | 1.2 Select relevant technology and software applications to achieve requirements of the task | 18–19, 37 |
| | 1.3 Adjust workspace, furniture and equipment to suit own ergonomic requirements | 11–13 |
| 2. Input and process information or data | 2.1 Identify and open application, according to task and organisational requirements | 37, 39, 41, 66, 100, 110, 117, 147 |
| | 2.2 Enter information or data into application according to organisational requirements | Throughout workbook |
| | 2.3 Ensure information or data is checked and amended according to organisational and task requirements | 47, 82, 114, 124 |
| | 2.4 Format information or data using appropriate application functions according to organisational and task requirements | 29, 45, 52, 57–59 76, 83–91, 107 |
| | 2.5 Use relevant help functions to overcome simple issues | 54, 71, 104, 112, 143, 148 |
| 3. Finalise and store data | 3.1 Review and edit final information or data, and prepare for storage in accordance with organisational and task requirements | 47, 82, 114, 124 |
| | 3.2 Name and store document and exit application | 36, 40, 46, 48, 68, 76, 107, 111, 114, 125, 149 |

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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 | Description | Page reference |
|---|---|---|
| Reading | • Recognises and interprets information from familiar sources to determine job role and task requirements | 5, 9–10, 20–21, 29, 36 |
| Writing | • Produces and amends files to meet task and organisational requirements | 39–114, 145–149 |
| | • Completes required documentation using organisational formats | Throughout workbook |

# Assessment for this unit

This unit is assessed by:

- interpreting information and data
- selecting appropriate equipment and applications
- creating documents based on information and data
- saving and storing documents.

## Assessment Requirements

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- select and use at least three business software applications on two occasions each.

### Performance Evidence

| In the course of the above, the candidate must: | Page reference |
|---|---|
| • select and use technology safely and according to organisational requirements | 9–17 |
| • identify and address faults according to requirements. | 9, 20–21 |

### Knowledge Evidence

| The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of: | Page reference |
|---|---|
| • key features of:<br>  • organisation's work health and safety requirements relevant to own role | 8–10 |
| • organisation's requirements for file naming and storage | 36, 40 |
| • applications used for organising electronic information and data. | 31–33 |


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# How to use this workbooks

## Files used in this workbook

You will require exercise files downloaded following the instructions in this workbook. Check that all the files listed have been downloaded.

- ❒ Assessment (folder)
- ❒ Correspondence (folder)
- ❒ Finance (folder)
- ❒ Cafe.jpg
- ❒ Coogee Dive Club.accdb
- ❒ Costello.docx
- ❒ Dining out.docx
- ❒ Fashion House.xlsx
- ❒ Folders.png
- ❒ Good food news.pdf
- ❒ Italy.doc
- ❒ Northland.docx
- ❒ Ocean sales.xlsx
- ❒ Order form.pdf
- ❒ Phone City.xlsx
- ❒ Planning a wedding.docx
- ❒ Quotation.xlsx
- ❒ Randalls Book Stores.pptx
- ❒ Spa therapies.docx
- ❒ Staff expense report.xlsx
- ❒ Tables.docx
- ❒ Tomatoes.png
- ❒ Tracey's budget.xlsx
- ❒ Ultimate outcomes.xlsx
- ❒ Utensils.png

## 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 used in 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.

## Shortcut key combinations

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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# Occupational overuse syndrome

Occupational overuse syndrome (OOS) is a collective term for a range of conditions which cause discomfort or pain and which are caused by performing repetitive tasks. Symptoms include:

- fatigue
- pain in the muscles or tendons
- burning sensations
- stiffness
- weakness
- numbness and tingling.

People who work with digital devices for lengthy periods are particularly susceptible to OOS. Typing and using the mouse both require repetitive actions which can result in pain in the hands, wrists, arms, shoulders and neck. OOS can also be exacerbated by inappropriate office furniture, poor workstation layout and poor work organisation.

Overuse of a smartphone can result in 'texter's thumb' where the tendons of the thumb become swollen and painful.

## Steps to reduce OOS risk

| | |
|---|---|
| Create an ergonomically correct workstation | A correct workstation layout can have a big impact on OOS prevention. Follow the information on setting up an ergonomically correct workstation and using portable devices safely covered earlier. |
| Vary tasks | Try to organise your day so that you vary your tasks. Typing non-stop for a long time can be damaging. Take a break from your computer – make business calls, file documents, get a glass of water to drink. |
| Take breaks | You should take frequent breaks away from your screen to avoid eyestrain and posture problems. The recommended break is 5–10 minutes every hour worked where work is screen-intensive. Make sure you do not work through your lunch break. |
| Limit use | Portable devices, by their very nature, can be carried everywhere. This can lead to overuse by being tempted to check work emails at unsuitable times such as when lying in bed, disturbing sleep patterns. Set limitations on use of your device and try and stick to them. |
| Micropause | A micropause is a short break from work for muscle relaxation. Generally it is a 5–15 second break every 5–10 minutes. Micropauses allow for the restoration of blood flow to muscles which have been held tense. Applications are available that remind you to take regular micropauses. |


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# 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.

| Current convention | Previous terms |
|---|---|
| Given name | First name<br>Christian name<br>Forename |
| Family name | Last name<br>Surname<br>Byname |

# Planning a document

Documents in the workplace are created to meet a specific need and will have a purpose and an intended audience. This should be identified by the person requesting the document. It is more efficient to draft the document in the app 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, e.g. a document that provides instructions may include a list of short numbered sentences and an advertisement will use descriptive words and images.

## Audience

Knowing who will be reading the document sets the tone which will be suitable for that audience. Aspects to consider are:

| | |
|---|---|
| Requirements | Why will they be reading your document? What information will they need? |
| Age | Slang may be appropriate 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. |
| Knowledge | Reports for subject-specific audiences can use technical terms which would not be used with the general public. |

**Example plan**

If you have been tasked with creating a document, 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<br>Must use library style guide |
| Format | One-page A5 flyer |
| Text | Date, time, location<br>List of events that will take place |
| Deadline | Next Friday |


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# File management

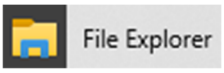
File Explorer is a file management app included in Windows 10 designed to help you manage files, folders and drives.

### Starting File Explorer

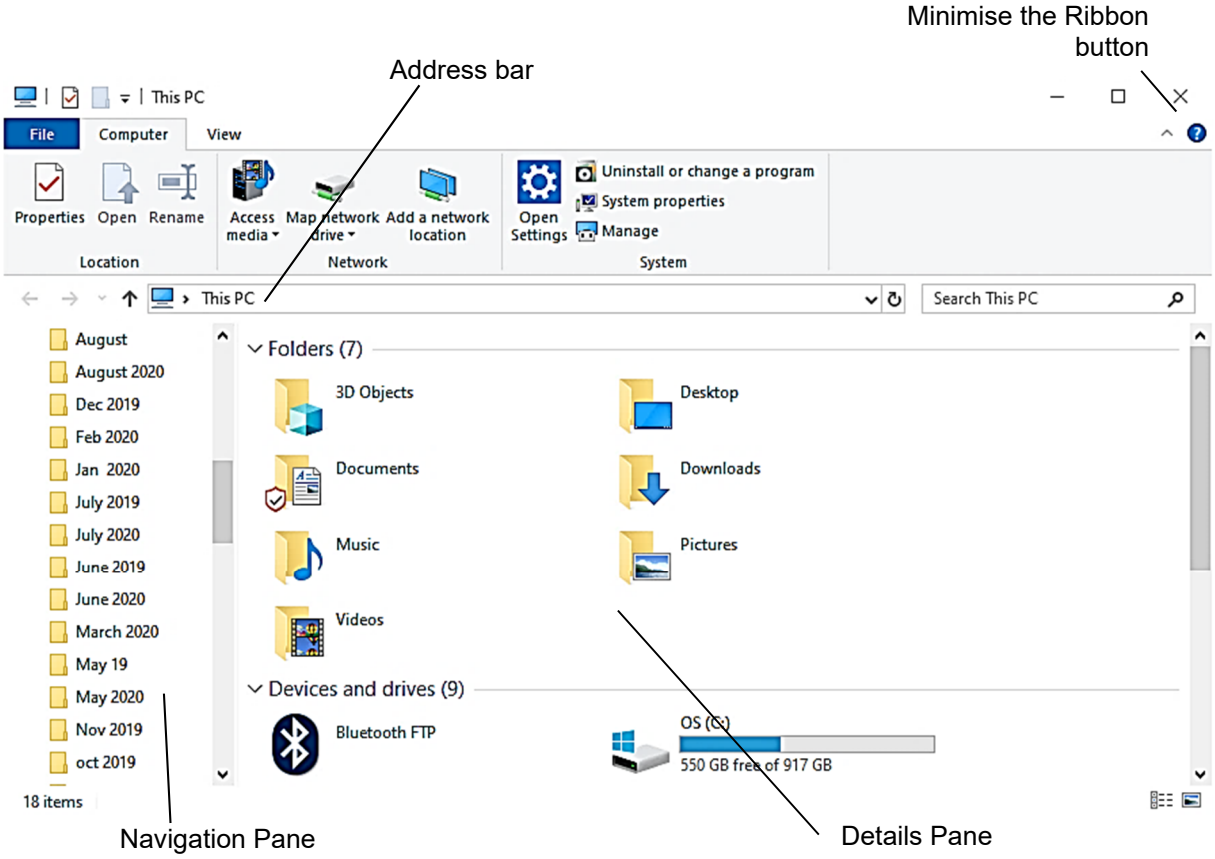
**Exercise 2**

1. Click on the File Explorer button on the taskbar

   OR

   Click on Start for and click on 
   
   .

The Navigation Pane is on the left and the Details Pane on the right. The drives and folders showing will depend on how your device had been set up.




2. Leave File Explorer open for the next exercise.

## File Explorer Ribbon

The File Explorer window has a Ribbon at the top. The main part of the Ribbon may be hidden when File Explorer first opens, however this can be pinned so it displays all the time.

**Exercise 3**

1. With the File Explorer window open check whether the Ribbon is displayed. If the full Ribbon is displayed, click on the Minimise the Ribbon button  in the top right corner of the Ribbon to hide it.
2. Click on the Expand the Ribbon button  in the top right corner of the Ribbon. This will display the Ribbon in its expanded form.
3. Leave File Explorer open for the next exercise.

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## Quick Access Toolbar

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

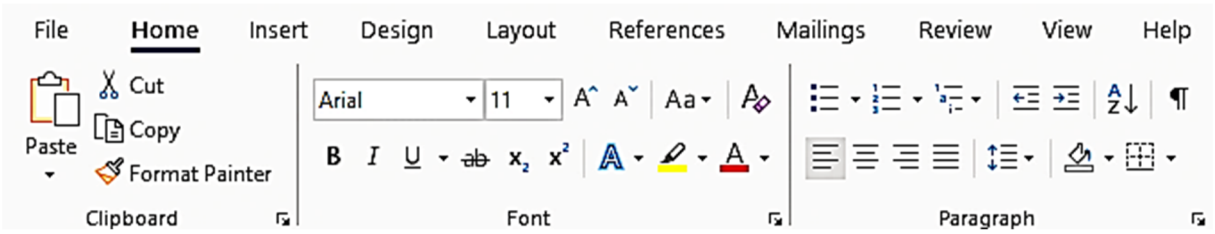
The AutoSave option is only available if you are using Word 365 and have access to the cloud for file storage.

## 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 and open, close, save and print documents.

## Ribbon

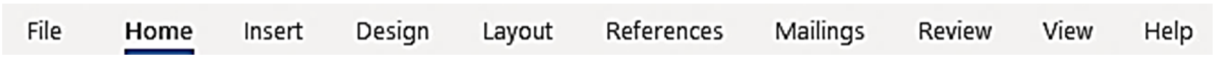
The Ribbon provides access to all the tools required for working with a document.




### 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.



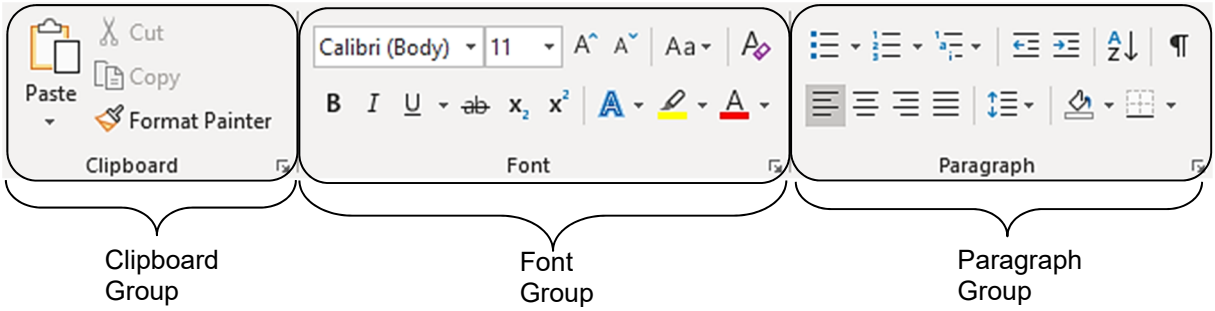

Context sensitive tabs display when the tools are needed, e.g. the Table tabs appears when you are working on a table and disappear when you have finished.

Word 365

Word Professional

### 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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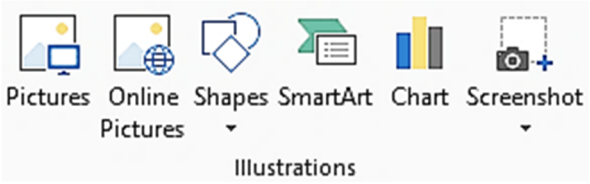
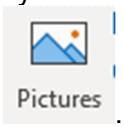
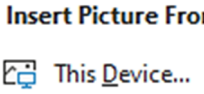
# Inserting pictures

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



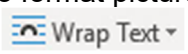

**Exercise 29**

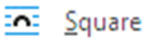
1. Using **Exercise 25…** click anywhere in the document and display the Insert Ribbon.
2. Click on the Pictures button 

. From the drop-down list that displays select This Device 

.The Insert Picture dialog box will display.
3. Navigate to the *978-1-921971-70-9 BSBTEC201 exercise files* folder.
4. Double click on the file **Cafe**.

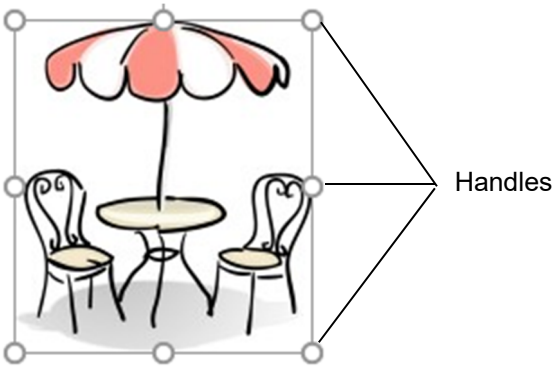
When the picture is selected, the Picture Format Ribbon will automatically be displayed. This is an extra Ribbon which is used to format pictures and images.

5. Click on the Wrap Text button 

and select Square 

. This will wrap text around the graphic – it can then be moved freely around the document.
6. Click on the image and holding down the mouse button, drag the image to the right of the text under the *Casual, Elegant Dining* heading.

When an image is selected handles are displayed around the picture as shown below.




7. Check the image is selected with handles displayed on each corner.
8. Position the mouse pointer over the bottom right handle. The mouse will display as .
9. Hold down the Shift key, click on the handle and drag inwards to reduce the size of the image slightly (holding down the Shift key resizes the picture proportionally).
10. Check that the image is now an appropriate size for the document as shown on page 61. Reposition the image as required.
11. Insert the image **Utensils** from the *978-1-921971-70-9 BSBTEC201 exercise files* folder.
12. Change the text wrapping to Square.
13. Reduce the size of the image and position it to the right of the *Elegant, Relaxed Dining* section.
14. Save and close the document.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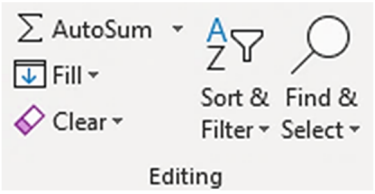
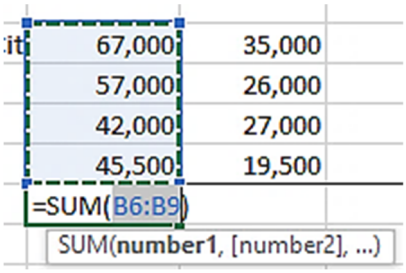
# AutoSum

The AutoSum button is used to add values of multiple cells in a worksheet. It is located in the Editing Group on the Home Ribbon. The drop-down list button next to the AutoSum button is used to select other functions, e.g. average, maximum.

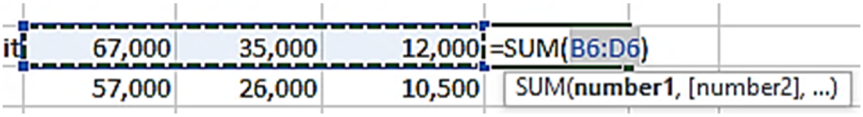



Before clicking on this button, check the active cell is where the result is to appear.

The AutoSum function will look up the column from the cursor position to find cells to add.

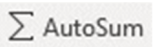


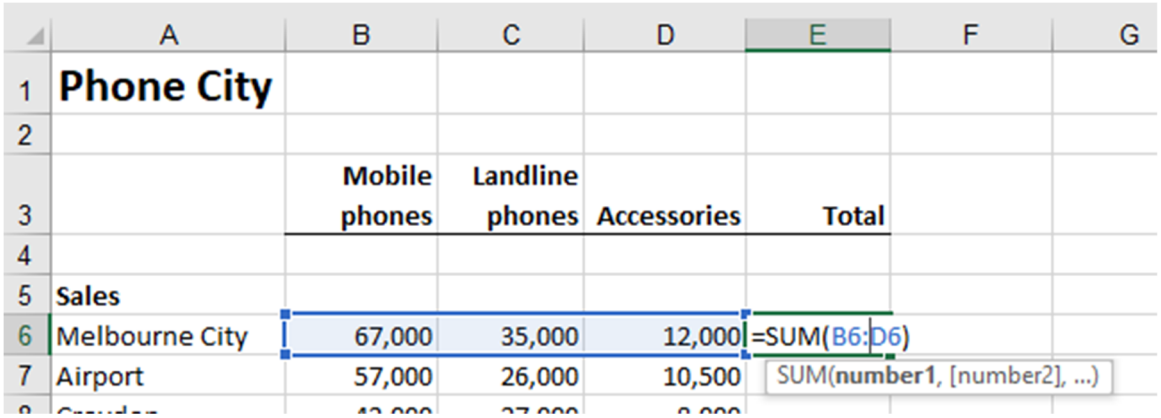

If cells above a total cell do not contain values, the AutoSum function will look to the left of the cursor position and select cells to add (across a row).




**Exercise 40**

1. Open the file **Phone City** from the *978-1-921971-70-9 BSBTEC201 exercise files* folder. Enable editing if required.
2. Save As the file in your working folder following workbook procedures.
3. Click on cell E6.

Alt = 4. With the Home Ribbon displayed click on the AutoSum button  located in the Editing Group.




- The formula displays = (equal to) indicating the start of a formula.
- The SUM function adds the data in the cells indicated in the range.
- Brackets are used to display the range to be totalled (from cells B6 to cell D6).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# Formatting a worksheet

## Formatting using the Ribbon

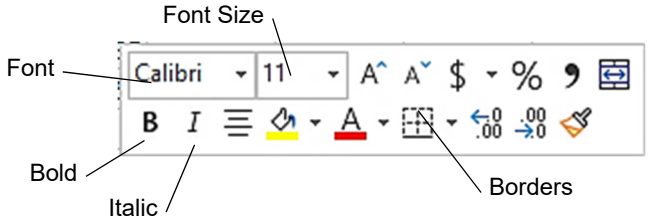
The Font Group and the Alignment Group located on the Home Ribbon contain a variety of tools to format a worksheet.

**Exercise 61**

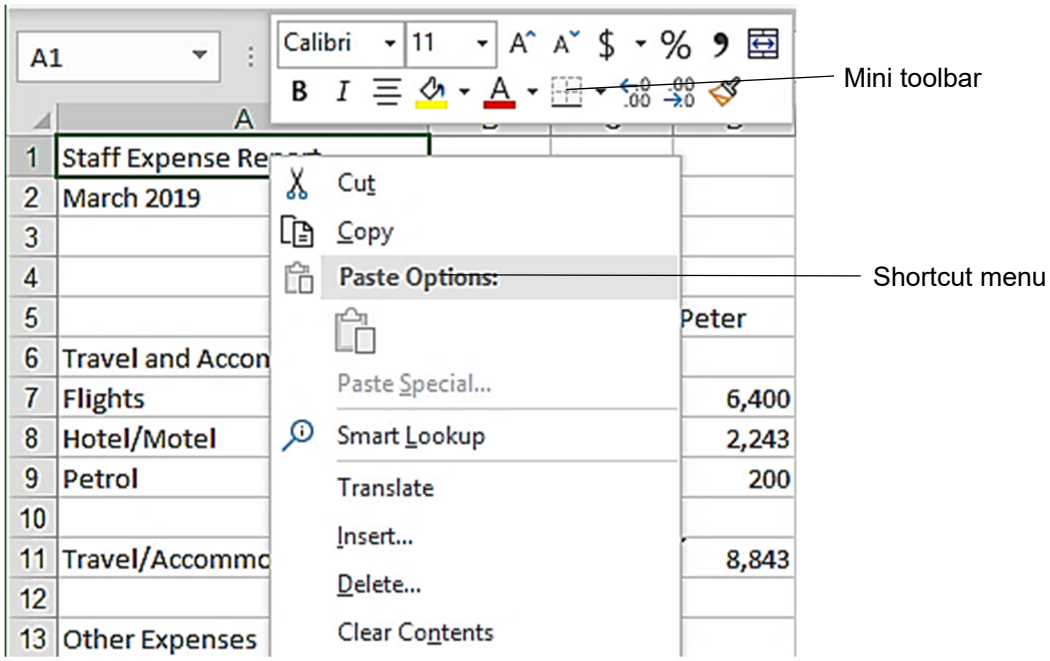
1. Using **Exercise 42...** select cells B4 to E4.
2. Click on the Bold button B in the Font Group. Keep the cells selected. (Ctrl B)
3. Click on the Align Text Right button in the Alignment Group to right align the column headers.
4. Press Ctrl Home and click B to bold the text Ernie's Stationery.
5. Click on cell A9 and press Ctrl B to apply bold formatting.
5. Leave the workbook open for the next exercise.

## Formatting using the Mini toolbar

A floating mini toolbar provides access to some of the tools commonly used to format a worksheet. It is activated using the right mouse button.




To display the mini toolbar select the cell(s) to be formatted and click the right mouse button. The mini toolbar and the shortcut menu will display.





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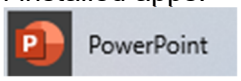
# Presentations

An electronic presentation is a collection of slides used to communicate information in a visual manner. Presentations can accompany speeches and lectures or run independently.

# Microsoft PowerPoint

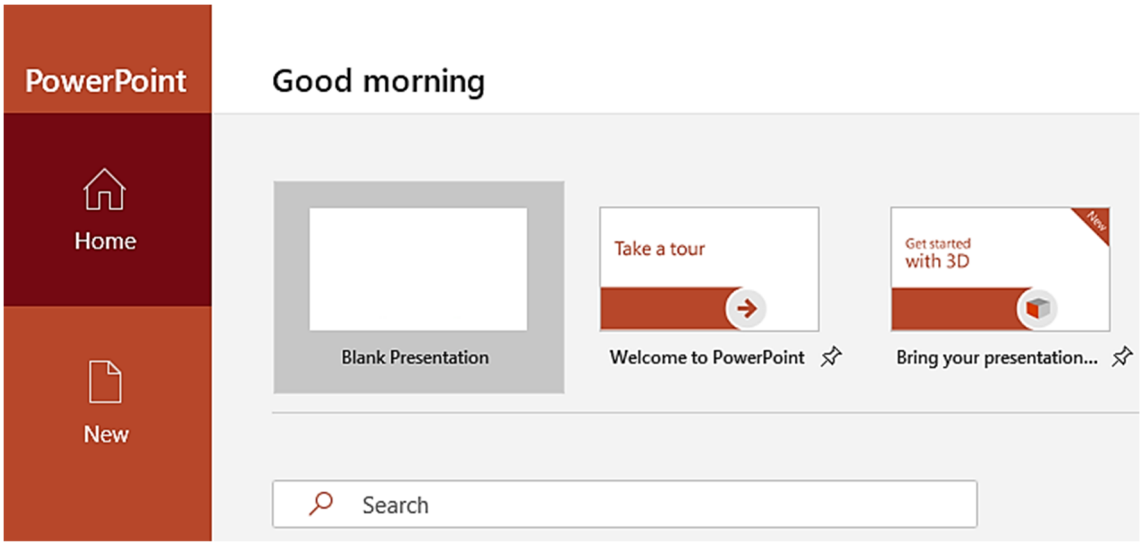
Microsoft PowerPoint is a presentations app in the Office suite.

**Exercise 80**

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

## Startup screen

When PowerPoint is opened the startup screen displays. This screen lists recently accessed documents along with a range of templates for creating presentations.




**Exercise 81**

1. With the PowerPoint startup screen displayed click on Blank Presentation.

   A new presentation based on the Blank Presentation template will be created.
2. Leave the blank presentation open for the next exercise.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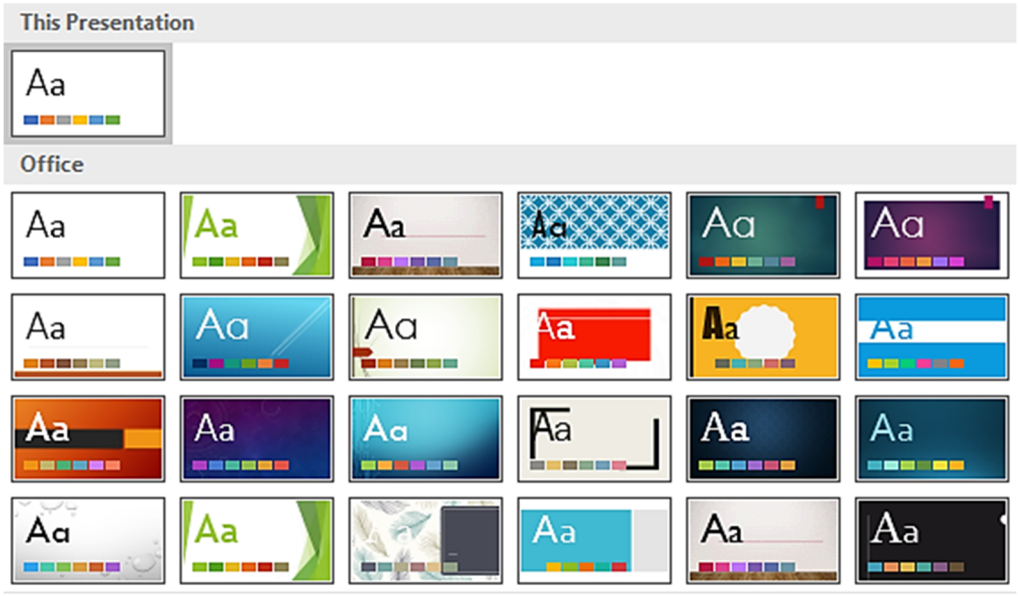
# Applying themes

If you have already created a presentation and would like to make it interesting and consistent you can apply a theme. Themes are sets of colours, fonts, effects and backgrounds that are automatically applied to the objects and elements of a presentation.

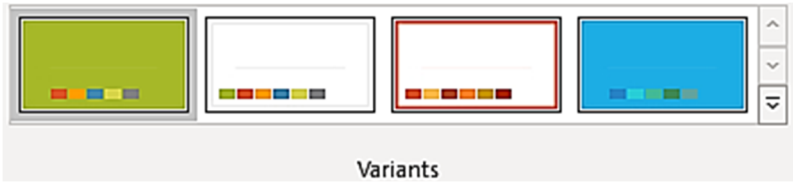
**Exercise 86**

1. Using **Exercise 85…** display the first slide.
2. Display the Design Ribbon.
3. Click on the More button of the Themes Group to display available themes.




4. Move your mouse pointer over some of the themes to preview them in the presentation.
5. Click on the theme called Basis. (Position your mouse pointer over the theme icon to display the name.) The design will be applied to the entire presentation.

Colour schemes can be changed using the Variants Group.




6. Select the blue variant to apply it to the presentation.
7. Click on and press the Spacebar to view the presentation in Slide Show View.
8. When all four slides have been viewed, press the Esc key.
9. Save and close the presentation.
10. Click on the Exit button to Exit PowerPoint.

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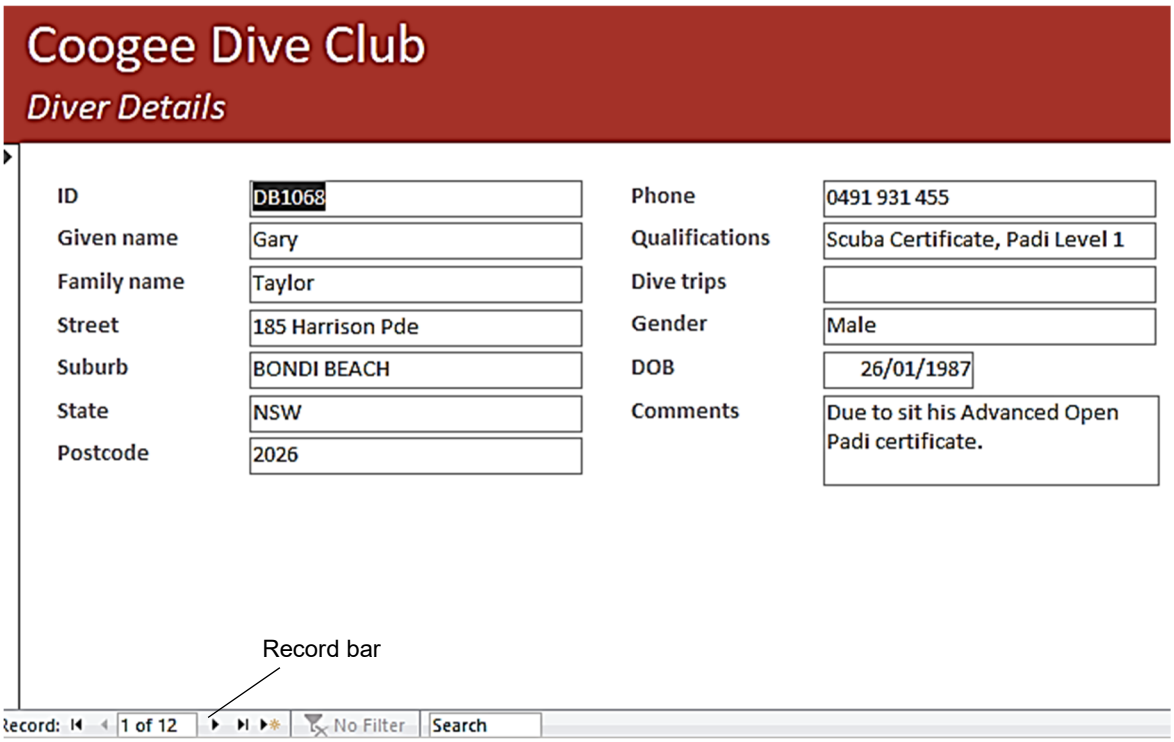
# Viewing a form

Forms are designed to allow a user to easily enter data into a database. They also allow data to be viewed quickly and easily on screen.

**Exercise 93**

1. Using **Exercise 89…** from the Navigation Pane double click on frmDiverDetails from the Forms section.




The first record is displayed when the form is opened.

To browse through the records use the Record bar at the bottom left of the form.

2. Click on the Next record button to move to the next record.
3. Click on the Previous record button to move to the previous record.
4. Leave the form open for the next exercise.

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## Quick Access Toolbar

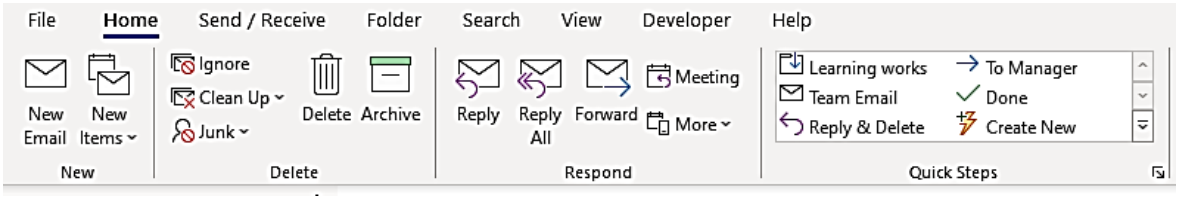
The Quick Access Toolbar located in the top left corner of the window contains a command to send and receive all emails . Frequently used commands can be added to this toolbar.

## File tab

Clicking on the File tab opens **Backstage view**. Backstage view provides options to set up and manage your email account and print emails.

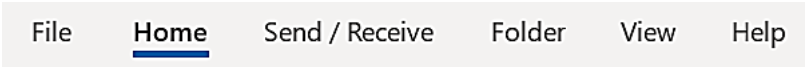
## Ribbon

The Ribbon provides access to Outlook tools.



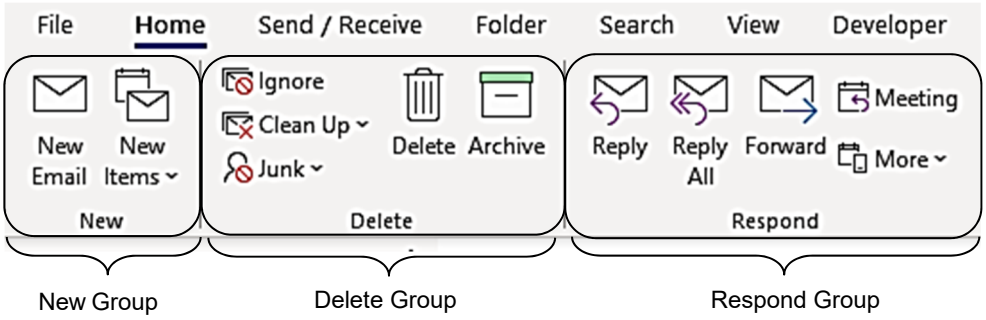

### Ribbon tabs

The Ribbon has a series of tabs along the top. Click on the tab to display the Ribbon required.




### Groups

Ribbons are split into groups, e.g. Respond Group. Each Group contains command buttons appropriate to a particular action. The New Email button is located in the New Group.




## Email list

The email list shows all the emails in the folder selected in the Folder Pane, e.g. all emails in the Inbox.

## Reading Pane

The Reading Pane displays the contents of a selected email.

## Zoom

Use Zoom to enlarge or reduce the size of text in the Reading Pane.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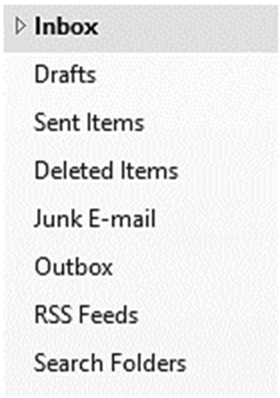
## Folder Pane

The Folder Pane displays all the folders into which mail can be filed. The folders displayed in the Folder Pane will vary depending on the type of email account you have and how it has been set up.




If a folder has a white triangle beside it

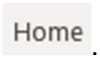
, it means there are subfolders within it. Click on the triangle to display the subfolders.

# Creating an email

**Exercise instructions**

Exercise 101 to Exercise 104 should be completed in one session without the email being closed.

**Exercise 101**

1. Check the Home Ribbon is displayed. If it is not, click on the Home tab 

.

Ctrl N 2. Click on the New Email button

from the New Group. A new email will open.

   Note the email has its own Ribbon with different tabs.

   If there are multiple accounts in Outlook, the new email will display a From button

. Use this button to select the account to send from.

3. Check the preferred address is selected in the *From* field.
4. Type your email address in the *To…* box. (You will be sending emails to yourself.)
5. Press Tab twice until the cursor is in the *Subject* box.

   OR

   Click in the *Subject* box.

6. Type: **Sending email**
7. Press Tab.

   OR

   Click in the email message area.

8. Type the text exactly as shown below including the spelling error.

   **The internet is great for transmiting emails to people across the world. I am presently sending an email.**

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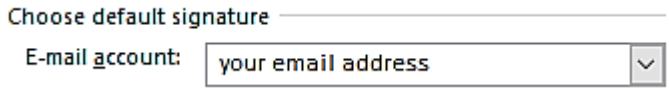
# Signatures

A signature is text and/or images which can be automatically appended to every email you send. A signature usually includes your name, job title and the organisation contact details following organisational policies and procedures.

### Exercise 111

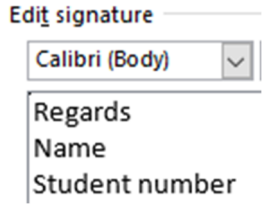
1. Click on the File tab File and select Options Options on the left of the screen.
2. Select Mail on the left.
3. Locate *Create or modify signatures for messages*.

4. Click on the Signatures button Signatures... . The Signatures and Stationery dialog box will display.
5. If there is more than one account attached to Outlook, select the correct account from the *E-mail account:* drop-down list in the Choose default signature section on the right.

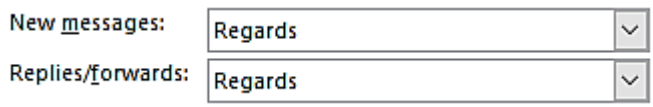



6. Click on the New button New .
7. Type: **Regards** into the box to identify your signature.

8. Click on OK.
9. Click in the *Edit signature* box and type: **Regards**
10. Press Enter then sign off the email following workbook procedures..




11. From the Choose default signature section select Regards from the *New messages:* drop-down list and the *Replies/forwards:* drop-down list.




This will automatically add this signature to any new emails, replies and forwarded emails.

12. Click on OK.
13. Click on OK to close the Outlook Options dialog box.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Portable document format (PDF) is multi-platform, meaning that documents saved in this format can be opened in a variety of apps. The document will look the same regardless of the device used to open it. This standardisation makes PDF a popular format for creating documents to be shared by email or downloaded from a website.

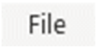
# PDF readers

A PDF reader is required to open a PDF document. Most internet browsers contain a built-in reader. Specialised PDF reader apps are also available, the most commonly used Adobe Acrobat Reader can be downloaded from the internet for free.

# Creating a PDF from Word

Creating a PDF of a Word document provides a visually accurate and a more secure document for distribution.

**Exercise 137**

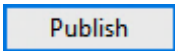
1. Open Word.
2. Open the file **Northland** from the *978-1-921971-70-9 BSBTEC201 exercise files* folder.
3. Click on the File tab 

then click on Export

.
4. Check Create PDF/XPS Documents

is selected and click on the Create PDF/XPS button

. The Publish as PDF or XPS dialog box will display.
5. Navigate to your working folder if it is not currently selected.
6. Check PDF is selected from the *Save as type:* drop-down list.
7. Remove the tick from the *Open file after publishing* check box.

8. Click on Publish 

. The document will be published as a PDF.
9. Use File Explorer to navigate to your working folder.
10. Double click on the PDF file **Northland** to open it.
11. View the PDF file and then close.
12. Close the Word document and exit Word.

# Creating a PDF from Excel

A worksheet, chart or workbook can be exported as a PDF.

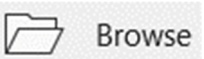
**Exercise 138**

1. Open Excel.

Ctrl O 2. Click on the File tab

and select Open

.

3. Click on Browse 

. The Open dialog box will display.
4. Navigate to the *978-1-921971-70-9 BSBTEC201 exercise files* folder.

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# Evidence guide

## Elements and Performance Criteria

| **Element**<br>*Elements describe the essential outcomes.* | **Performance Criteria**<br>*Performance criteria describe the performance needed to demonstrate achievement of the element.* | **Assessment tasks** |
|---|---|---|
| 1. Select and prepare to use technology | 1.1 Identify task purpose, audience, format and presentation requirements, and clarify with relevant personnel where required | Task 2, Task 3, Task 4, Task 5, Task 6, Task 7 |
| | 1.2 Select relevant technology and software applications to achieve requirements of the task | Task 2, Task 3, Task 4, Task 5, Task 6, Task 7 |
| | 1.3 Adjust workspace, furniture and equipment to suit own ergonomic requirements | Task 1 |
| 2. Input and process data | 2.1 Identify and open application, according to task and organisational requirements | Task 2, Task 3, Task 4, Task 5, Task 6, Task 7 |
| | 2.2 Enter information or data into application according to organisational requirements | Task 2, Task 3, Task 4, Task 5, Task 6, Task 7 |
| | 2.3 Ensure information or data is checked and amended according to organisational and task requirements | Task 2, Task 3, Task 4, Task 5, Task 6, Task 7 |
| | 2.4 Format information or data using appropriate application functions according to organisational and task requirements | Task 2, Task 3, Task 4, Task 5, Task 6, Task 7 |
| | 2.5 Use relevant help functions to overcome simple issues | Task 2, Task 3, Task 4, Task 5, Task 6, Task 7 |
| 3. Finalise and store data | 3.1 Review and edit final information or data, and prepare for storage in accordance with organisational and task requirements | Task 2, Task 3, Task 4, Task 5, Task 6, Task 7 |
| | 3.2 Name and store document and exit application | Task 2, Task 3, Task 4, Task 5, Task 6, Task 7 |

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# Assessment Requirements

## Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- select and use at least three business software applications on two occasions each.

| In the course of the above, the candidate must: | **Assessment tasks** |
|---|---|
| • select and use technology safely and according to organisational requirements | Task 2, Task 3, Task 4, Task 5, Task 6, Task 7 |
| • identify and address faults according to requirements. | Task 2, Task 3, Task 4, Task 5, Task 6, Task 7 |

## Knowledge Evidence

| The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of: | **Assessment tasks** |
|---|---|
| • key features of:<br>  • organisation's work health and safety requirements relevant to own role | Task 1 |
| • organisation's requirements for file naming and storage | Task 2, Task 3, Task 4, Task 5, Task 6, Task 7 |
| • applications used for organising electronic information and data. | Task 2, Task 3, Task 4, Task 5, Task 6, Task 7 |


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