

Business Services Training

Unit of Competency

Produce Texts from Notes

BSBADM302B

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to take notes from oral or printed sources to produce accurate text.

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

Employability Skills

This unit contains employability skills.

Pre-requisite Units

Nil

Application of the Unit

This unit applies to individuals employed in a range of work environments who produce notes and texts from oral or printed sources. They may work as individuals providing administrative support within an enterprise, or they may be responsible for the production of their own notes and other documentation.

Competency Field

Administration – General Administration.

**SUITABLE
FOR
BSBADM302**

Produce Texts from Notes

This book supports BSBADM302B Produce Texts from Notes in the Business Services Training Package.

© Melanie Hastings, July 2015

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Performance Criteria

Unit Competencies

Competency Element Elements describe the essential outcomes of a unit of competency.	Performance Criteria Performance Criteria describe the required performance needed to demonstrate achievement of the Element. Where italicised text is used, further information is detailed in the Required Skills and Knowledge and/or Range Statement. Assessment of performance is to be consistent with the Evidence Guide.
1 Take notes	1.1 Prior to commencing the task, identify organisational requirements relating to style, presentation and storage of documents
	1.2 Clarify the <i>purpose</i> and <i>requirements</i> of text with the author/speaker
	1.3 Record notes with the <i>required degree of accuracy</i> from <i>appropriate sources</i>
	1.4 Clarify meaning and spelling of names or technical terms to ensure accuracy of the notes
	1.5 <i>Self-check notes</i> for accuracy
2 Transcribe notes	2.1 Produce text from notes to the <i>required degree of accuracy</i> and to reflect the meaning intended by the author
	2.2 Produce text within <i>designated timelines</i>
3 Edit and revise text	3.1 <i>Self-check final text</i> for accuracy, and grammar and ensure syntax is appropriate for the intended purpose and audience of the text
	3.2 Revise, format, name, store and print text in accordance with <i>organisational and task requirements</i>

Required Skills and Knowledge

This section describes the essential skills and knowledge and their level, required for this unit.

These skills must be assessed as part of this unit	<ul style="list-style-type: none">▪ communication skills to clarify requirements of documents▪ literacy skills to:<ul style="list-style-type: none">▪ read and understand organisational procedures▪ produce a range of documents▪ proofread and edit work for accuracy against original▪ problem solving skills to address inconsistencies or errors in text▪ memory retention skills to accurately capture information
This knowledge must be assessed as part of this unit	<ul style="list-style-type: none">▪ formatting styles and their effect on formatting, readability and appearance of documents▪ key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as:<ul style="list-style-type: none">▪ anti discrimination legislation▪ ethical principles▪ codes of practice▪ privacy laws▪ Occupational Health and Safety▪ organisational requirements for ergonomics, work periods and breaks, and conservation techniques▪ organisational style guide

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Italicised wording in the Performance Criteria is detailed below.

<i>Purpose</i> may include:	<ul style="list-style-type: none"> ▪ agendas ▪ formal or informal letters ▪ meeting notes ▪ memos ▪ reports
<i>Requirements</i> may include:	<ul style="list-style-type: none"> ▪ summary motions plus meeting summary i.e. minutes ▪ summary record of meetings ▪ summary of verbal instructions
<i>Recording notes with the required degree of accuracy</i> may include:	<ul style="list-style-type: none"> ▪ capturing intended meaning of dictation ▪ complete record
<i>Appropriate sources</i> may include:	<ul style="list-style-type: none"> ▪ at meetings ▪ by telephone ▪ dictation ▪ for multiple speakers ▪ from audiotapes ▪ from printed matter ▪ in person ▪ those taken <ul style="list-style-type: none"> ▪ via teleconference ▪ via videoconference
<i>Self-checking notes</i> may include:	<ul style="list-style-type: none"> ▪ checking correlation between source and notes ▪ clarifying names, addresses and specific spelling with information on file ▪ inserting punctuation ▪ reading over notes for meaning
<i>Producing text from notes to the required degree of accuracy</i> may include:	<ul style="list-style-type: none"> ▪ correct grammar ▪ correct spelling ▪ correct use of technical vocabulary ▪ intended meaning
<i>Designated timelines</i> for production of text may include:	<ul style="list-style-type: none"> ▪ organisation timeline e.g. agenda or minutes of meeting ▪ timeline agreed with supervisor or person requiring text
<i>Self-checking final text</i> may include:	<ul style="list-style-type: none"> ▪ checking grammar ▪ checking intended meaning ▪ checking spelling

Performance Criteria

<i>Organisational and task requirements may include:</i>	<ul style="list-style-type: none"> ▪ author's instructions ▪ number of copies ▪ organisational format
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Evidence Guide

The Evidence Guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for this Training Package.


Critical aspects for assessment and evidence required to demonstrate competency	<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> ▪ producing accurate documents from notes that meet the requirements of the author or speaker ▪ using a range of note taking techniques and methods
Context of and specific resources for assessment	<p>Assessment must ensure:</p> <ul style="list-style-type: none"> ▪ access to an actual workplace or simulated environment ▪ access to office equipment and resources ▪ access to examples of audio sources for transcription and note taking
Method of assessment	<p>A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:</p> <ul style="list-style-type: none"> ▪ direct questioning with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate ▪ review of authenticated documents from the workplace or training environment ▪ demonstration of techniques in a workplace or simulated environment <p>Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example</p> <ul style="list-style-type: none"> ▪ BSBWRT301A Write simple documents ▪ other general business units

Types of documents

Once you know the purpose and requirements of the text, you can choose an appropriate type of document to produce. Some documents may be formal, some informal, there may be legal rules regarding some specialist documents (eg documents that are going to be used in court), or there may be templates set up for certain documentation (eg faxes or file notes).

Documents that you may create from notes include the following.

<ul style="list-style-type: none"> ▪ Formal letters ▪ Informal letters ▪ Memos ▪ Faxes ▪ Accounting documents, eg invoices, statements, credit notes ▪ Legal documents, eg wills, deeds ▪ Medical documents, eg ward rounds, patient notes ▪ Notices of meetings ▪ Agendas ▪ Minutes of meetings ▪ Notes of meetings ▪ Emails ▪ Court proceeding records, judgments ▪ Forms ▪ Reports ▪ Newspaper articles, magazine stories 	<ul style="list-style-type: none"> ▪ Spreadsheets, eg balance sheets, income and expenditure accounts ▪ Essays ▪ Book manuscripts/ Theses/Dissertations ▪ Records of conferences/seminars ▪ Notes of discussion or focus groups ▪ Witness statements ▪ Notes of interviews ▪ Lecture notes ▪ Memoirs ▪ Presentations ▪ Records of press conferences ▪ Research reports ▪ Newsletters ▪ Telephone discussion notes ▪ Conference call notes ▪ Record of disciplinary proceedings
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	<p>Exercise 3: Purposes for notes</p> <p>Write down three example purposes for taking notes at a business conference, and a document type that would be appropriate for each purpose.</p>
1	
2	
3	

The following pages give example formats for some of the key documents that you may be asked to produce.

Formal letter

XYZ Pty Ltd
1 Elizabeth Street
SYDNEY NSW 2050
Email xyz@xyz.com.au
Tel 1234 5678

The organisation's address and other contact details, normally pre-printed on letterheaded paper.

Date
22 July 2009

Tom Smith
Head of Supplies
AAA Pty Ltd
200 Jones Street
Sydney NSW 2060

Recipient's name, job title and address

Dear Mr Smith

Salutation

Meeting of 15 July 2009

Heading

Thank you for coming to see my colleague and me last week. I enjoyed the meeting and thought we made good progress.

As we agreed in discussion, I have set up a working group here at XYZ to investigate the products that we will need if we are to go ahead with production of the new range of widgets. This group is due to report at the end of September.

You are welcome to liaise directly with its Chairwoman, Peta Parkin, whom you also met last week. In any event, I will be in touch when developments occur. I look forward to working with you.

Yours sincerely

Mary Brown

Signature

Mary Brown
Purchasing Manager

Name and job title of the author of the letter

Standard letter

You may be asked to fill details into a 'standard letter'. A standard letter is a pre-written letter in response to a question that is asked many times. A standard letter contains all the information that needs to be sent out to enquirers and avoids the same letter having to be drafted in response many times over. The author simply provides the new 'variable' information, which is inserted in the relevant places.

For example, if you worked for a publishing house, staff would get many letters from would-be authors asking if the company would be interested in reading their manuscript. Rather than writing a new letter each time such a query was received, a standard letter would be created, which might go along the following lines.

[DATE]

[NAME AND ADDRESS]

Dear [NAME]

Thank you for your recent [EMAIL/LETTER/FACSIMILE].

I was interested to read that you had recently completed a [NOVEL/SHORT STORY/POETRY COLLECTION/BIOGRAPHY] and would like to congratulate you on this achievement.

Way Out Books specialises in the following topics:

- Science fiction
- Romance
- Crime fiction
- Poetry

We do not publish any other titles. If your book [TITLE OF BOOK] fits within any of the categories listed above, please supply us with the following:

- A one page summary of what your book is about.
- Your views on who would be interested in reading your book.

Please DO NOT send us your complete book in the first instance.

Thank you once again for contacting us and for your interest in Way Out Books.

Yours sincerely

Margaret Reader
Way Out Books

Informal letter

An informal or personal letter is usually typed on plain paper.

<p>20 Fairview Road ALBURY NSW</p>	—————	<p>Address of the writer (not including the name of the writer)</p>
<p>13 July 2009</p>		
<p>Barney McCormack 4 Bradwell Road Peterborough Cambs PE3 6RR ENGLAND</p>		
<p>Dear Barney</p>		
<p>Thank you for the fascinating information you found on the internet, which you forwarded to me earlier this week, regarding the discovery of ice sheets on Mars.</p>		
<p>My research into Mars – and the potential for life there – is going well and I’m hoping to get a short article published in the local newspaper within the next couple of months.</p>		
<p>This discovery has everyone talking again about when the first peopled flight to Mars will take place. The indications are that it will certainly be in our lifetime, perhaps only 20 years away – with the trip itself taking up to one year. I would love to go, but sadly I think I’m just too old.</p>		
<p>Thank you again for passing on the information. I look forward to visiting you when I am in England next year.</p>		
<p>With kind regards</p>		
<p><i>Lily Casey</i></p>		
<p>Lily Casey</p>		

- of recordings, tape or digital
- of dictation
- of printed matter

The following pages give advice, information and hints on how to take notes efficiently from various sources.

Note-taking in meetings

There are two main purposes for taking notes during meetings.

1. The usual requirement of any text produced from notes made in meetings is that the text becomes the 'minutes' of the meeting. Minutes are the formal record of the meeting. All formal meetings have them and they are helpful for informal ones.

The main uses of *minutes* are:

- as a record of decisions and actions agreed
 - as the basis for the next meeting (eg to review what should have been done)
2. The other text that may be required is a '*summary of meeting*' that summarises the various arguments made by the different parties, and provides a record of events rather than just summarising the outcome.

When producing a summary of a meeting – whether it's a board meeting you are attending in person or a teleconference, video conference, etc – it is essential to convey accurately what was said. It may also be important to assign speech to a particular person, but this isn't always a necessary part of the job.

Preparation

You should ask in advance what will be covered at the meeting and what are the most important areas of discussion, then you will have a head start on understanding the issues that are going to be explored.

Get hold of an agenda and ask in advance for an explanation of anything on the agenda that you don't understand.

Ask for a list of attendees (then you can ensure you get name spellings correct and also you can cross out non-attendees rather than having to write down attendees).

Check if there are any other documents (eg motion papers) that would be useful to you.

Don't be afraid to ask the chairperson to factor in some time for you to be able to get all your notes down on paper.

What to note

- All conclusions, decisions and action points (as well as who will carry them out and the deadlines).
- Omit unnecessary detail or repetition, just record the main points discussed.

- For minutes, don't report what individuals say as several people may say similar things and it may not matter who said them. Just summarise the main point, using the third person, eg "It is important for all club members to get their voting slips in by 5 June".
- Note any papers that were tabled, ie given out at the meeting rather than sent out beforehand.
- Number events in your notes so you don't lose track of any discussion or action.
- Number your notes pages as you go – it's possible that the meeting may discuss items out of order and it is easy to lose track of the thread of notes after the event.
- If you can't hear something, or don't understand a discussion, ask people to repeat their comment. Alternatively, mark the section clearly in your notes and ask the chairperson to explain the point to you afterwards.
- Ask proposers of motions to fill in a motion sheet and submit it to you once it has been seconded, so that you can get the wording correct.
- Don't write down any 'off the record' comments.
- Highlight any points that need to be clarified with someone else after the meeting.

Example of notes taken at a meeting

Minutes of meeting 3/8/09

Present: Shirley T (C), Kim L, Blair H, Dimitri P, Yvonne M, Carlos F, India B

Apologies: Raoul, Noah

1. *Prev meet mins agr'd & correct.*
2. *Staff Canteen - agr'd. Sch'd to open in 3 mths.*

*** Action – BH to investigate suppliers.**

3. *DP req'd xtra funding for IT training in a/c dept. Staff struggling w new software.*

*** Action – DP to contact training firms. In-house training pref.**

4. *YM dissatisfied w office security. Door to st left open twice. 2 b'cases stolen from office last mth.*

*** Action – YM to write ltr of complaint to sec'y firm.**

5. *Tender due to be sub'tted to McMillan Pty Ltd on 15/9. Behind sched. KL to join team temporarily to assist.*

Close meet 6.00pm

Nxt meet 7/09

Minutes of meetings – particular points to note

There may be certain things that participants say (particularly criticisms, arguments or emotive or inflammatory comments) that they do not want recorded.

On the other hand, they may want to acknowledge somebody's contribution – and so what sounds like a pat on the back may actually be intended for incorporation into the minutes.

How will you know whether you should be noting or not?

People may tell you ("Please do not minute that").

If they do not say anything and you are unsure, you could:

- ask the chairperson for advice
- find out the background to the group, to identify any hidden agendas, vested interests, or 'politicking'
- ask another group member to check your minutes
- look at other minutes of similar groups to see how they were written.



Exercise 5: Make notes from audio file

Open the digital audio file *BatesMtg.wav* and play it through your computer speakers. This audio file contains dictation summarising a meeting. Make notes from the dictation so that you can write up the minutes of the meeting.

(If you cannot play digital audio files, open the Word document *BatesMtg*, which is a transcript of the dictation, and make notes from that.)

Note-taking in one-on-one situations

One-on-one situations are interviews in which you are participating. You may need to take notes of such meetings if you are a journalist, a lawyer or if you are conducting a job interview. One-on-one situations may be face-to-face or held by more remote methods, such as over the telephone.

Preparation

Make sure you know what the purpose of the discussion you are about to have is – what do you need to know, what questions do you have that need answering? If the most important information that you need to get from a job applicant regards their work experience, make sure you know what questions you will ask and how much information you need to get from them.

Where possible and appropriate, ensure you have all of the relevant basic information, for instance, correct spelling of names, home town, occupation, date of birth, before you begin (eg if you are a lawyer conducting a witness interview).

In certain situations you may be able to make in advance a numbered list of questions to ask your interviewee. You can then refer to the question by number rather than having to note down what you asked during the interview. Alternatively write questions on a sheet of paper and leave space so that you can note down the answers underneath. This method is only appropriate if the interview is oriented towards 'fact-finding' rather than conversation.

What to note

- Don't write down everything you hear as not all of it will be important and it will be a waste of your time. As you listen, make a judgement on the value of the information you are hearing. If in doubt, though, note it down.
- Distinguish between information that can be paraphrased (facts) and quotes that need to be taken down word for word.
- Be attentive to the interviewee and concentrate on them, not just on your notes. This will help your understanding and also make the conversation flow better. If the other party doesn't think you are paying proper attention, they may be annoyed or frustrated and the conversation may dry up.
- When you hear an important point, make sure that it stands out in your notes, eg by putting a star next to it.
- If the other party speaks too quickly, ask them to slow down or repeat themselves. They should be pleased that you are taking care to note down what they have said correctly.
- Take notes sequentially, which means that you shouldn't revisit notes higher up the page and make changes in the light of something you hear later on. This will result in you not having an accurate record of what was said during the different stages of the interview – and inconsistencies or inaccuracies may prove to be important.
- If you are in a face-to-face situation, don't make notes that are likely to annoy or upset your interviewee, eg don't write in large letters NO!! Your interviewee may see your notes and feel rather offended.
- As it is hard to take notes and participate in a conversation at the same time, you may find tape recording your meetings and then taking notes from the tape recording an efficient method of working.

Example of notes of an interview

Job Interviewee: **Tara Bond**

Position applied for: Marketing Assistant. (Reporting to Fiona Bird.)

Date and time of interview: 16/7/09. 1.00 pm.

First impressions.

Smart, well-groomed, on time

Background?

Worked 4 newspaper since Leav'g college where did journalistic diploma. Learned c. deadlines! Wnts to do more corporate work. Lks thought of hving own a/c/s to manage.

Expectations of job and what applicant would enjoy about it.

Expects to start by assisting senior staff members., but to have own clients within yr - though wld still hv to doublech'k w senior staff before talking to client. Wld lke the creative side of planning ad camp'ns and w'king closely with clients.

Areas of business interested in.

Wld be keen to wk with IT clients or communications clients (was TB's specialism when journalist)

Follow-up and comments. (To be filled in after end of interview.)

Gd communicator. Very creative. High flyer. Has high expect'ions so not sure if she is interest'd having had posn expl'd to her. Ask for 2nd int and cross fingers. Query: cld ask Fiona if any Mktng Executive posns are coming up - wld suit TB better.



Exercise 6: Role play

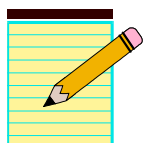
Form groups of four. As a group choose a job advertisement from today's newspaper. One of the group will interview one other member of the group for the position. Before starting the interview the interviewer, assisted by another member of the group, should make a list of four questions they would like to ask the applicant. Meanwhile the interviewee (assisted by the fourth member) should think about questions that may be asked and appropriate responses. During the interview the interviewer and the two observers should make notes on the interview and their impressions of the applicant. Take turns to play each of the different roles using different job adverts. Compare notes and discuss any differences in approach.

Note-taking at lectures and presentations

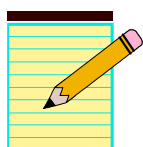
If you are attending lectures, talks or presentations, you may be required to take notes in order to write up a summary, report or article later. The final document could be for your own use or for someone else's reference.

**Exercise 27: Proofread newspaper**

Take a page from today's newspaper and read it carefully to see if you can find any spelling or grammatical mistakes.

**Exercise 28: Proofread document using spell checker**

Open document *Entertainment*. Proofread it and correct all spelling mistakes. You can use the automatic spell checker on your computer too. This document should be in Australian English, so American spellings should be amended where appropriate.

**Exercise 29: Produce documents from notes**

Open document *Fanshaw*. It contains notes that have been made from dictation. You are required to produce the documents noted. The dictator is pushed for time and doesn't want to have to amend your work and send it back for corrections to be made, therefore you should pay careful attention to spelling when producing the documents.

Commonly confused words**accept and except**

When you take something, you *accept* it. *Except* means everyone or everything apart from those mentioned.

Examples

Everyone enjoyed the barbecue Rachel.

We decided to the invitation to Julia's wedding.

practice and practise

Practice is a noun and is used to describe, for example, a doctor's practice. *Practise* is a verb and means to train, to do frequently, eg to practise for an assessment.

Examples

If you learn to play the piano it is important that you every day.

John decided to open his own dental with his friend David.

principal and principle

Principal is an adjective and means chief, main, primary or most important. (*Principal* is also a noun, when it means head or leader in command.) *Principle* is only a noun and means a code, rule or belief.

Examples

The raising of money is the charity's objective.

Simon's strict meant that he never borrowed money from friends.

affect and effect

Affect is a verb and means to cause a change. *Effect* is (primarily) a noun and means a result or change that has been caused.

Examples

Deflated tyres a car's braking power.

The of the accident was the closure of the road for two hours.

Grammar

Definition: *Grammar*

The study of how words and their component parts combine to form sentences.

Automatic grammar checkers

A grammar checker works in a similar way to a spell checker. However, it is worth remembering that while spell checkers are generally very useful and will – at the very least – pick up typos, automatic grammar checkers are not particularly effective. All too often they highlight phrases that are grammatically correct and suggest changes that actually render the phrases grammatically nonsensical – use with caution!

Grammatical rules

The following are some grammatical rules to watch out for.

'that' and 'which'

The strict rule as to whether you should write 'that' or 'which' is: 'that' is used when the next piece of information is a necessary piece of information relating to what came before, ie without it you wouldn't know of what the speaker was talking. 'Which' is used when you can tell what is being talked about even if the phrase wasn't there. 'Which' is preceded by a comma.

Examples

Whose is the car is parked in my driveway?

The letter, was a marvellous piece of writing, arrived yesterday.

The verb must agree with the noun

If you have a sentence such as 'One in three companies fails to register' remember that the noun is 'one company (in three)', so the verb takes the *singular* form (NOT 'One in three companies fail to register').

Example

The number of boys at the school was dwindling.

less and fewer

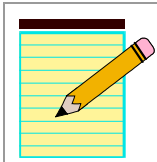
Less refers to one item (such as time, hope, etc), whereas fewer refers to lots of items (eg friends, cars, etc).

Example

Regular use of Vitamin C means fewer infections, less often.

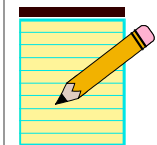
should have and should of

When spoken out loud 'should've' sounds like 'should of'. However, should've is short for 'should have' and should always be written like that if being written in full: 'should of' is always wrong.



Exercise 30: Proofread and correct grammar and spelling

- Open document *Maryland report*. It is a short report that contains some errors.
- Proofread it and correct all grammatical and spelling mistakes.



Exercise 31: Prepare report from notes

- Open document *Brown and Simpson*. It contains notes of a videoconference between the board members of Brown and Simpson.
- The board members would like a short report (not minutes) written up from the notes. They would like it recorded who came up with the various ideas for future reference. Produce this report.



Research

- **The Penguin Dictionary of English Grammar** by RL Trask (published by Penguin). ISBN 0140514643. A guide to the grammatical laws that govern the English language.
- **The Oxford English Dictionary.**
- **Online resource:** www.dictionary.com.

Accurate punctuation

The words are only part of what transcription is about – punctuation is another vital part.

Definition: *Punctuation*

The use of standard marks and signs in writing to separate words into sentences, clauses and phrases in order to clarify meaning.

In addition to spelling and grammar, you should check your punctuation. Bad punctuation not only looks bad but it can alter the meaning of a message if it is put in the wrong place.

For example, read the following two sentences:

However, the client decided it wasn't going to happen.
However the client decided, it wasn't going to happen.

Competency Element	Performance Criteria	Relevant Exercises	<input checked="" type="checkbox"/>
2 Transcribe notes	2.1 Produce text from notes to the <i>required degree of accuracy</i> and to reflect the meaning intended by the author	<ul style="list-style-type: none"> ▪ Exercise 16: Determine appropriate text ▪ Optional Exercise 17: Set up AutoCorrect options in Word 2007 ▪ Optional Exercise 18: Set up Building Block entries in Word 2007 ▪ Optional Exercise 19: Find and use a Building Block ▪ Optional Exercise 20: Use automatic keys ▪ Exercise 21: Produce minutes from written meeting notes ▪ Exercise 22: Produce memo from notes ▪ Exercise 23: Produce summary from notes ▪ Exercise 24: Re-draft letter ▪ Exercise 25: Correct spelling of signs ▪ Exercise 26: Spell check document ▪ Exercise 27: Proofread newspaper ▪ Exercise 28: Proofread document using spell checker ▪ Exercise 29: Produce documents from notes ▪ Exercise 30: Proofread and correct grammar and spelling ▪ Exercise 31: Prepare report from notes ▪ Exercise 32: Correct punctuation errors ▪ Exercise 33: Prepare minutes from notes ▪ Exercise 34: Check documents for completeness ▪ Exercise 35: Create documents from notes 	<input type="checkbox"/>
	2.2 Produce text within <i>designated timelines</i>	<ul style="list-style-type: none"> ▪ Exercise 36: Prioritise tasks 	<input type="checkbox"/>
3 Edit and revise text	3.1 <i>Self-check final text</i> for accuracy, and grammar and ensure syntax is appropriate for the intended purpose and audience of the text	<ul style="list-style-type: none"> ▪ Exercise 37: Check document ▪ Exercise 38: Proofread document 	<input type="checkbox"/>
	3.2 Revise, format, name, store and print text in accordance with <i>organisational and task requirements</i>	<ul style="list-style-type: none"> ▪ Optional Exercise 39: Use Word 2007 Find and Replace feature ▪ Exercise 40: Re-format document 	<input type="checkbox"/>

Continuous Assessment against Required Skills and Knowledge

The following essential skills and knowledge must be met for this unit.

Skills	<input checked="" type="checkbox"/>	Supporting Evidence
<ul style="list-style-type: none"> ▪ literacy skills for: <ul style="list-style-type: none"> ▪ reading and understanding organisational procedures ▪ producing a range of documents ▪ proofreading and editing, to check work for accuracy against original 	<input type="checkbox"/>	
<ul style="list-style-type: none"> ▪ communication skills to clarify requirements of documents 	<input type="checkbox"/>	
<ul style="list-style-type: none"> ▪ problem solving skills to address inconsistencies or errors in text 	<input type="checkbox"/>	
<ul style="list-style-type: none"> ▪ culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities 	<input type="checkbox"/>	
<ul style="list-style-type: none"> ▪ memory retention skills 	<input type="checkbox"/>	
<ul style="list-style-type: none"> ▪ communication skills to clarify requirements of documents 	<input type="checkbox"/>	

Knowledge	<input checked="" type="checkbox"/>	Supporting Evidence
<ul style="list-style-type: none"> ▪ overview knowledge of key provisions of relevant legislation, standards and codes that may affect aspects of business operations, such as: <ul style="list-style-type: none"> ▪ anti discrimination legislation ▪ ethical principles ▪ codes of practice ▪ privacy laws ▪ Occupational Health and Safety 	<input type="checkbox"/>	
<ul style="list-style-type: none"> ▪ organisational requirements for ergonomics, work periods and breaks, and conservation techniques 	<input type="checkbox"/>	
<ul style="list-style-type: none"> ▪ formatting styles and their effect on formatting and readability and appearance of documents 	<input type="checkbox"/>	
<ul style="list-style-type: none"> ▪ organisational style guide 	<input type="checkbox"/>	

Employability Skills

Employability skills are embedded in the competencies. Refer to the employability skills summaries for the qualification in question to establish specific application. This is established at the Qualification rather than the Unit level.

The following table lists activities and exercises that may demonstrate specific employability skills in general terms.

Skills	<input checked="" type="checkbox"/>	Relevant Exercise
Communication	<input type="checkbox"/>	<ul style="list-style-type: none"> ▪ Exercise 2: Organisational requirements ▪ Exercise 7: Group work ▪ Exercise 10: Group work ▪ Exercise 12: Group work
Teamwork	<input type="checkbox"/>	<ul style="list-style-type: none"> ▪ Exercise 6: Role play ▪ Exercise 10: Group work ▪ Exercise 12: Group work
Problem solving	<input type="checkbox"/>	<ul style="list-style-type: none"> ▪ Exercise 7: Group work ▪ Exercise 11: Expand notes with full details ▪ Exercise 12: Group work ▪ Exercise 13: Activity and optional exercise – Medical terminology ▪ Exercise 16: Determine appropriate text ▪ Exercise 21: Produce minutes from written meeting notes ▪ Exercise 22: Produce memo from notes ▪ Exercise 23: Produce summary from notes ▪ Exercise 24: Re-draft letter
Initiative and enterprise	<input type="checkbox"/>	<ul style="list-style-type: none"> ▪ Exercise 1: Events at which notes are taken ▪ Exercise 3: Purposes for notes ▪ Exercise 10: Group work ▪ Exercise 13: Activity and optional exercise – Medical terminology ▪ Exercise 16: Determine appropriate text ▪ Exercise 21: Produce minutes from written meeting notes ▪ Exercise 22: Produce memo from notes ▪ Exercise 23: Produce summary from notes ▪ Exercise 24: Re-draft letter ▪ Exercise 36: Prioritise tasks

Planning and organising	<input type="checkbox"/>	<ul style="list-style-type: none"> ▪ Exercise 1: Events at which notes are taken ▪ Exercise 2: Organisational requirements ▪ Exercise 3: Purposes for notes ▪ Exercise 16: Determine appropriate text ▪ Optional Exercise 17: Set up AutoCorrect options in Word 2007 ▪ Optional Exercise 18: Set up Building Block entries in Word 2007 ▪ Optional Exercise 19: Find and use a Building Block ▪ Optional Exercise 20: Use automatic keys ▪ Exercise 36: Prioritise tasks
Self management	<input type="checkbox"/>	<ul style="list-style-type: none"> ▪ Exercise 7: Group work ▪ Exercise 12: Group work ▪ Exercise 14: Check notes for clarity and consistency ▪ Exercise 15: Check notes for accuracy ▪ Exercise 36: Prioritise tasks
Learning	<input type="checkbox"/>	<ul style="list-style-type: none"> ▪ Exercise 3: Purposes for notes ▪ Exercise 4: Make notes for specific texts ▪ Exercise 5: Make notes from audio file ▪ Exercise 6: Role play ▪ Exercise 7: Group work ▪ Exercise 8: Make notes from audio file ▪ Exercise 9: Take notes from information sheet ▪ Exercise 14: Check notes for clarity and consistency ▪ Exercise 15: Check notes for accuracy ▪ Exercise 25: Correct spelling of signs ▪ Exercise 26: Spell check document ▪ Exercise 27: Proofread newspaper ▪ Exercise 28: Proofread document using spell checker ▪ Exercise 29: Produce documents from notes ▪ Exercise 30: Proofread and correct grammar and spelling ▪ Exercise 31: Prepare report from notes ▪ Exercise 32: Correct punctuation errors ▪ Exercise 33: Prepare minutes from notes ▪ Exercise 34: Check documents for completeness ▪ Exercise 35: Create documents from notes ▪ Exercise 37: Check document ▪ Exercise 38: Proofread document ▪ Exercise 40: Re-format document
Technology	<input type="checkbox"/>	<ul style="list-style-type: none"> ▪ Optional Exercise 17: Set up AutoCorrect options in Word 2007 ▪ Optional Exercise 18: Set up Building Block entries in Word 2007 ▪ Optional Exercise 19: Find and use a Building Block ▪ Optional Exercise 20: Use automatic keys ▪ Optional Exercise 39: Use Word 2007 Find and Replace feature

BSB BUSINESS SERVICES TRAINING PACKAGE SUPPLEMENT

This workbook can be used by learners completing a qualification in the BSB Business Services Training Package.

BSBADM302 Produce text from notes

Application

This unit describes the skills and knowledge required to take notes from oral or printed sources to produce accurate text.

It applies to individuals employed in a range of work environments who produce notes and texts from oral and printed sources. They may work as individuals providing administrative support within an enterprise, or they may be responsible for the production of their own notes and other documentation.

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

Unit Sector

Administration – General Administration

Elements and Performance Criteria

This learner guide is structured according to the Performance Criteria for the Unit of Competence. Each major heading represents a performance criterion. All content under that heading relate to that competency.

ELEMENT <i>Elements describe the essential outcomes.</i>	PERFORMANCE CRITERIA <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>	How will the evidence be gathered?
1 Take notes	1.1 Identify organisational requirements relating to style, presentation and storage of documents prior to commencing the task	Exercise 1: Events at which notes are taken Exercise 2: Organisational requirements
	1.2 Clarify the purpose and requirements of the text with author/speaker	Exercise 3: Purposes for notes
	1.3 Record notes with the required degree of accuracy from appropriate sources	Exercise 4: Make notes for specific texts Exercise 5: Make notes from audio file Exercise 6: Role play Exercise 7: Group work Exercise 8: Make notes from audio file Exercise 9: Take notes from information sheet
	1.4 Clarify meaning and spelling of names or technical terms to ensure accuracy of the notes	Exercise 10: Group work Exercise 11: Expand notes with full details Exercise 12: Group work Exercise 13: Activity and optional exercise – Medical terminology
	1.5 Self-check notes for accuracy	Exercise 14: Check notes for clarity and consistency Exercise 15: Check notes for accuracy

ELEMENT <i>Elements describe the essential outcomes.</i>	PERFORMANCE CRITERIA <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>	How will the evidence be gathered?
2 Transcribe notes	2.1 Produce text from notes to the required degree of accuracy and to reflect the meaning intended by the author/speaker	Exercise 16: Determine appropriate text Optional Exercise 17: Set up AutoCorrect options in Word 2007 Optional Exercise 18: Set up Building Block entries in Word 2007 Optional Exercise 19: Find and use a Building Block Optional Exercise 20: Use automatic keys Exercise 21: Produce minutes from written meeting notes Exercise 22: Produce memo from notes Exercise 23: Produce summary from notes Exercise 24: Re-draft letter Exercise 25: Correct spelling of signs Exercise 26: Spell check document Exercise 27: Proofread newspaper Exercise 28: Proofread document using spell checker Exercise 29: Produce documents from notes Exercise 30: Proofread and correct grammar and spelling Exercise 31: Prepare report from notes Exercise 32: Correct punctuation errors Exercise 33: Prepare minutes from notes Exercise 34: Check documents for completeness Exercise 35: Create documents from notes
	2.2 Produce text within designated time lines	Exercise 36: Prioritise tasks
3 Edit and revise text	3.1 Self-check final text for accuracy and grammar, and ensure syntax is appropriate for the intended purpose and audience of the text	Exercise 37: Check document Exercise 38: Proofread document
	3.2 Revise, format, name, store and print text in accordance with organisational and task requirements	Optional Exercise 39: Use Word 2007 Find and Replace feature Exercise 40: Re-format document

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	Learner guide page reference
Reading	1.1, 1.3-1.5, 2.1, 3.1, 3.2	<ul style="list-style-type: none"> ▪ Interprets textual information to establish job requirements 	50
		<ul style="list-style-type: none"> ▪ Proofreads own work to ensure language elements meet audience and organisational expectations 	58–71, 79–80
Writing	1.3-1.5, 2.1, 2.2, 3.1, 3.2	<ul style="list-style-type: none"> ▪ Prepares a range of texts using appropriate language and structure to communicate relevant information effectively 	43, 54, 58, 61, 79
		<ul style="list-style-type: none"> ▪ Edits and corrects own work to ensure accuracy and consistency 	42, 46, 51, 57–69, 78–81
Oral communication	1.2, 1.3, 1.4	<ul style="list-style-type: none"> ▪ Uses listening skills to confirm understanding of requirements 	30–31, 37–39
		<ul style="list-style-type: none"> ▪ Participates in verbal exchanges using appropriate tone and language 	30–31, 35
Numeracy	2.2	<ul style="list-style-type: none"> ▪ Uses basic arithmetic to ensure work is completed according to workplace deadlines 	73–75
Navigate the world of work	1.1, 3.2	<ul style="list-style-type: none"> ▪ Takes some personal responsibility for adherence to organisational procedures and protocols 	11–12, 75, 82–84
Get the work done	1.1, 3.2	<ul style="list-style-type: none"> ▪ Plans a range of routine tasks accepting goals and aiming to achieve them according to predetermined deadlines 	73–75
		<ul style="list-style-type: none"> ▪ Takes responsibility for routine low-impact decisions within familiar situations 	14, 74, 88–89
		<ul style="list-style-type: none"> ▪ Uses familiar digital systems and tools to access, organise and display information 	34, 39, 60–61, 65, 86–87, 89

Assessment requirements v1.1

Performance Evidence

Evidence of the ability to:	How will the evidence be gathered?
<ul style="list-style-type: none"> take accurate notes from oral and printed sources according to task requirements 	Exercise 5: Make notes from audio file Exercise 6: Role play Exercise 7: Group work Exercise 8: Make notes from audio file Exercise 9: Take notes from information sheet
<ul style="list-style-type: none"> produce accurate texts from notes that meet workplace requirements and predetermined timelines. 	Exercise 21: Produce minutes from written meeting notes Exercise 22: Produce memo from notes Exercise 23: Produce summary from notes Exercise 29: Produce documents from notes Exercise 31: Prepare report from notes Exercise 33: Prepare minutes from notes Exercise 35: Create documents from notes Exercise 36: Prioritise tasks

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:	How will the evidence be gathered?
<ul style="list-style-type: none"> describe methods and techniques for taking notes from oral sources and written sources 	Exercise 5: Make notes from audio file Exercise 6: Role play Exercise 7: Group work Exercise 8: Make notes from audio file Exercise 9: Take notes from information sheet
<ul style="list-style-type: none"> describe organisational requirements for production of documents 	Exercise 1: Events at which notes are taken Exercise 2: Organisational requirements
<ul style="list-style-type: none"> describe the requirements of an organisational style guide. 	Exercise 2: Organisational requirements