BSBCMN306A Produce business documents
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Modification History
Not applicable.

Unit Descriptor
This unit covers the skills and knowledge required to produce various business documents. It includes the skills and knowledge required to select and use a range of functions on a computer application. This unit relates to BSBCMN213A Produce simple wordprocessed documents and BSBCMN405A Analyse and present research information. Consider co-assessment with BSBCMN305A Organise workplace information.

Application of the Unit
Not applicable.

Licensing/Regulatory Information
Not applicable.

Pre-Requisites
Not applicable.

Employability Skills Information
Not applicable.

Elements and Performance Criteria Pre-Content
Not applicable.
## Elements and Performance Criteria

<table>
<thead>
<tr>
<th>Element</th>
<th>Performance Criteria</th>
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<tbody>
<tr>
<td>1 Select and prepare resources</td>
<td>1.1 Appropriate technology and software applications are selected and utilised to produce required business documents</td>
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<td></td>
<td>1.2 Organisational requirements for information entry, storage, output and quality of presentation are identified prior to design of documentation</td>
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<td>1.3 Workspace, furniture and equipment are adjusted to suit the ergonomic requirements of the user</td>
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<tr>
<td>2 Design document</td>
<td>2.1 Document design is appropriate for the efficient entry of information and maximises the presentation and appearance of information</td>
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<td>2.2 Files and records are identified, opened, generated and amended according to task and organisational requirements</td>
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<td></td>
<td>2.3 A range of functions are used to ensure consistency of design and layout</td>
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<td></td>
<td>2.4 Input devices are operated within designated speed and accuracy requirements</td>
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<tr>
<td>3 Produce document</td>
<td>3.1 Document production is completed within designated timelines according to organisational requirements</td>
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<td></td>
<td>3.2 Documents produced are checked to ensure they meet task requirements for style and layout</td>
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<td></td>
<td>3.3 Storage of documents is appropriate and applications are exited without damage to or loss of information</td>
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<tr>
<td></td>
<td>3.4 Manuals, training booklets and/or help-desks are used to overcome basic difficulties with document design and production</td>
</tr>
</tbody>
</table>
Required Skills and Knowledge

Not applicable.
Evidence Guide

The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence
Selecting and applying appropriate technology and software
Designing and producing business documents using a software application
Using of a range of functions which enhance the presentation and readability of the document
Applying OHS procedures for set up of workstation and operation of computer
Using data storage options

Underpinning Knowledge*
* At this level the learner must demonstrate some relevant theoretical knowledge.
The relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
Understanding the organisation's policies, plans and procedures
Understanding the functions and features of contemporary computer applications
Techniques and methods used to check accuracy
Understanding how to select appropriate technology for production requirements
Knowledge of organisational requirements for document design eg. style guide

Underpinning Skills
Literacy skills to read and understand a variety of texts; prepare general information and papers according to target audience; spell with accuracy; use grammar and punctuation effectively as an aid to understanding
Proofreading and editing skills to ensure clarity of meaning and conformity to organisational requirements, check for accuracy and consistency of information
Problem solving skills to determine document design and production processes
Numeracy skills to access and retrieve data
Keyboarding and computer skills to complete a range of formatting and layout tasks
Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

Resource Implications
The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

Consistency of Performance
In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Context/s of Assessment
Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement
Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package
Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment
Assessment should reinforce the integration of the key competencies and the Business Services Common Competencies for the particular AQF Level. Refer to the Key Competency Levels at the end of this unit.

**Key Competency Levels**

- **Collecting, analysing and organising information** (Level 2) - to design document layout
- **Communicating ideas and information** (Level 2)
- **Planning and organising activities** (Level 2) - for self
- **Working with teams and others** (Level 1) - in completing scheduled tasks
- **Using mathematical ideas and techniques** (Level 1) - as an aid to checking accuracy
- **Solving problems** (Level 1) - to identify application problems
- **Using technology** (Level 2) - to complete allocated tasks

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies. The Evidence Guide identifies the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

**Critical Aspects of Evidence**

- Selecting and applying appropriate technology and software
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- Using of a range of functions which enhance the presentation and readability of the document
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**Underpinning Knowledge**

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- The relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Understanding the organisation's policies, plans and procedures
- Understanding the functions and features of contemporary computer applications
- Techniques and methods used to check accuracy
- Understanding how to select appropriate technology for production requirements
- Knowledge of organisational requirements for document design eg. style guide

**Underpinning Skills**

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Please refer to the Assessment Guidelines for advice on how to use the Key Competencies
Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:
- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Technology may include:
- computers
- scanners
- photocopiers
- printers

Software may include:
- word processing packages
- spreadsheet packages
- database packages
- accounting packages
- presentation packages

Business documents may include:
- newsletters
- client databases
- proposals
- reports
- accounts statements
- project reviews
- web pages

Organisational requirements may include:
- quality assurances and/or procedures manuals
- log-on procedures
- legal and organisational policy/guidelines and requirements
- correctly identifying and opening files
- locating data
- budgets
- Occupational Health and Safety policies, procedures and programs
- security
- saving and closing files
- storing data
- manufacturer's guidelines

Functions used when designing a document may include:
- using styles
- merging documents
- table formatting
- using columns
spell checking
editing
alternating headers and footers

**Input devices may include:**
keyboard
numerical key pad
mouse
scanner

**Storage of documents may include:**
storage in directories and sub-directories
storage on CDROMs, disk drives or back up systems
storage/filing of hard copies of computer generated documents
storage/filing of hard copies of incoming and outgoing facsimiles
storage/filing of incoming and outgoing correspondence

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**Unit Sector(s)**

Not applicable.