



Australian Government

Department of Education, Employment and Workplace Relations

BSBADM506B Manage business document design and development

Revision Number: 1

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Modification History

Not applicable.

Unit Descriptor

Unit descriptor	<p>This unit describes the performance outcomes, skills and knowledge required to establish standards for the design and production of organisational documents and to manage document design and production processes to ensure agreed standards are met.</p> <p>No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.</p>
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Application of the Unit

Application of the unit	<p>This unit applies to individuals employed in a range of work environments who require well developed skills in the use of a range of software packages. They use these skills to establish, document and implement consistent standards of document design with an organisation.</p>
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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.
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Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.
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Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Establish documentation standards	<p>1.1. Identify organisational requirements for information entry, storage, output, and quality of <i>document</i> design and production</p> <p>1.2. Evaluate organisation's present and future information technology capability in terms of its effect on document design and production</p> <p>1.3. Identify types of documents used and required by the organisation</p> <p>1.4. Establish documentation <i>standards and design tasks</i> for organisational documents in accordance with information, budget and technology requirements</p>
2. Manage template design and development	<p>2.1. Ensure standard formats and templates suit the purpose, audience and information requirements of each document</p> <p>2.2. Ensure document templates enhance readability and appearance, and meet organisational requirements for style and layout</p> <p>2.3. Test templates, obtain organisational and user feedback, and make amendments as necessary to ensure maximum efficiency and quality of presentation</p>
3. Develop standard text for documents	<p>3.1. Evaluate <i>complex technical functions</i> of software for their usefulness in automating aspects of standard document production</p> <p>3.2. Match requirements of each document with software functions to allow efficient production of documents</p> <p>3.3. Test macros to ensure they meet the requirements of each document in accordance with documentation standards</p>
4. Develop and implement strategies to ensure the use of standard documentation	<p>4.1. Prepare explanatory notes for the use of standard templates and macros using content, format and language style to suit existing and future users</p> <p>4.2. Develop and implement training on the use of standard templates and macros and adjust the content and level of detail to suit user needs</p> <p>4.3. Produce, circulate, name and store master files and print copies of templates and macros in accordance with organisational requirements</p>
5. Develop and implement strategies	<p>5.1. Monitor use of standard documentation templates and macros, and evaluate the quality of documents</p>

ELEMENT	PERFORMANCE CRITERIA
for maintenance and continuous improvement of standard documentation	produced against documentation standards 5.2. Review documentation standards against the changing needs of the organisation, and plan and implement improvements in accordance with organisational procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to present complex instructions orally, to communicate ideas logically, and to explain technical concepts and designs to others
- literacy skills to:
 - read and interpret policies and procedures
 - review and select technological designs
 - consider aspects of context, purpose and audience when designing and formatting texts
- research and analysis skills to evaluate content, structure and purpose of technical texts, and to adapt task instructions to suit changes in technology
- technological skills to manage design requirements and layouts.

Required knowledge

- cost constraints
- document production processes
- functions of range of software applications, including desktop publishing, word processing and spreadsheets
- key provisions of relevant legislation and regulations from all forms of government, codes and standards that may affect aspects of business operations, such as:
 - anti-discrimination legislation
 - ethical principles
 - codes of practice
 - privacy laws
- organisational policies and procedures relating to document design and formatting
- sources of expertise external to the organisation or workgroup.

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Evidence of the following is essential:

- designing templates or style sheets for use in document design
- documenting processes and strategies to ensure implementation.

Context of and specific resources for assessment

Assessment must ensure:

- access to office equipment and resources, including:
 - computer hardware and other document production equipment
 - range of software applications appropriate to the task
 - media for production of documents
- access to samples of high quality standardised documents.

Method of assessment

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

- analysis of responses to case studies and scenarios
- demonstration of techniques
- direct questioning combined 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
- oral or written questioning to assess knowledge of accounting procedures and techniques.

Guidance information for assessment

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

- information and communications technology units
- other general administration units.

Range Statement

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. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

<i>Documents</i> may be created:	<ul style="list-style-type: none"> • using a range of commercial or organisational software packages: <ul style="list-style-type: none"> • databases • desktop publishing • spreadsheets • word processing
<i>Standards and design tasks</i> may include:	<ul style="list-style-type: none"> • binding • binding media • checking final print copy • client requirements • colour photocopy • copying • creating templates and style or procedures manual • drafting • drawing • editing • electronic or paper-based • enterprise policies and procedures • enterprise templates or house style conventions for margins, fonts, use of colour • final document presentation • formatting • language and style of document • liaison with external personnel • locating and collecting appropriate information or precedents • print quality • production of graphics • production of multiple and subsequent copies • quality standards • use of page layout software • writing

RANGE STATEMENT

Complex technical functions
may include:

- data transfer
- display features
- embedding
- exporting
- fields
- form fields
- formulae
- importing
- index
- linking
- macros
- merge criteria
- sort criteria
- table of contents

Unit Sector(s)

Unit sector	
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Competency field

Competency field	Administration - General Administration
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Co-requisite units

Co-requisite units		