Australian Government

Department of Education, Employment and Workplace Relations

# BSBITU401A Design and develop complex text documents

**Revision Number: 1**

INDUSTRY SKILLS COUNCILS
Creating Australia's Future

## BSBITU401A Design and develop complex text documents

## Modification History

Not applicable.

## Unit Descriptor

| Unit descriptor | This unit describes the performance outcomes, skills and knowledge required to design and develop business documents using complex technical features of word processing software. |
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| | No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement. |

## Application of the Unit

| Application of the unit | This unit applies to individuals who work in a range of business environments and are skilled in the creation of complex documents using word processing software. These skills may be applied in the provision of administrative support within an enterprise, or by technical/knowledge experts responsible for producing their own word processed documents. |
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## Licensing/Regulatory Information

Not applicable.

## Pre-Requisites

| Prerequisite units | |  |
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# 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 |
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| 1. Prepare to produce word processed documents | 1.1. Use safe work practices to ensure *ergonomic*, *work organisation*, *energy and resource conservation requirements* are addressed |
| | 1.2. Identify *document* purpose, audience and presentation requirements, and clarify with relevant personnel as required |
| | 1.3. Identify *organisational requirements* for text-based business documents to ensure consistency of style and image |
| | 1.4. Evaluate *complex technical functions* of the software for their usefulness in fulfilling the requirements of the task |
| | 1.5. Match document requirements with software functions to provide efficient production of documents |
| 2. Design complex documents | 2.1. *Design* document *structure and layout* to suit purpose, audience and information requirements of the task |
| | 2.2. Design document to enhance readability and appearance, and to meet organisational and task requirements for style and layout |
| | 2.3. Use complex software functions to enable efficient manipulation of information and other material, and ensure *consistency of design and layout* |
| | 2.4. Use manuals, user documentation and online help to overcome problems with document design and production |
| 3. Add complex tables and other data | 3.1. Insert a standard table into document, changing cells to meet information requirements |
| | 3.2. *Format rows and columns* as required |
| | 3.3. Insert images and *other data*, *formatting* as required |
| 4. Produce documents | 4.1. Use complex operations in the development of documents, to achieve required results |
| | 4.2. Preview, adjust and *print* documents in accordance with organisational and task requirements |
| | 4.3. *Name and store documents* in accordance with organisational requirements and exit the application without information loss/damage |
| | 4.4. Prepare documents within *designated time lines* and organisational requirements for speed and accuracy |

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# Required Skills and Knowledge

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| **REQUIRED SKILLS AND KNOWLEDGE** |
| This section describes the skills and knowledge required for this unit. |
| **Required skills** |
| <ul><li>communication skills to clarify requirements of documents</li><li>keyboarding skills to enter text and numerical data</li><li>literacy skills to edit and proofread documents, creating documents with a complex, organised structure of linked paragraphs which use simple and complex syntactic structure</li><li>numeracy skills to collate and present data, graphs and annotated referencesproblem-solving skills to use processes flexibly and interchangeably.</li></ul> |
| **Required knowledge** |
| <ul><li>formatting styles and their effect on formatting, readability and appearance of documents</li><li>organisational requirements for ergonomics, work periods and breaks, and conservation techniques</li><li>organisational style guide.</li></ul> |

# Evidence Guide

| EVIDENCE GUIDE | |
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| 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: <ul><li>production of text documents using advanced software functions</li><li>application of document design principles.</li></ul> |
| **Context of and specific resources for assessment** | Assessment must ensure: <ul><li>access to an actual workplace or simulated environment</li><li>access to office equipment and resources</li><li>access to examples of complex text documents and style guides.</li></ul> |
| **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: <ul><li>direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate</li><li>review of documents with complex design</li><li>demonstration of techniques</li><li>oral or written questioning to assess knowledge of word processing software functions.</li></ul> |
| **Guidance information for assessment** | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: <ul><li>BSBWRT401AWrite complex documents.</li></ul> |

# Range Statement

| RANGE STATEMENT | |
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| 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. | |
| ***Ergonomic requirements*** may include: | • avoiding radiation from computer screens<br>• chair height, seat and back adjustment<br>• document holder<br>• footrest<br>• keyboard and mouse position<br>• lighting<br>• noise minimisation<br>• posture<br>• screen position<br>• workstation height and layout<br>• equipment that is reasonably adjusted to meet personal needs, in appropriate circumstances |
| ***Work organisation requirements*** may include: | • exercise breaks<br>• mix of repetitive and other activities<br>• rest periods |
| ***Energy and resource conservation requirements*** may include: | • double-sided paper use<br>• recycling used and shredded paper<br>• re-using paper for rough drafts (observing confidentiality requirements)<br>• using power-save options for equipment |
| Complex ***documents*** may include: | • call outs<br>• captions<br>• concordance files<br>• different odd and even pages<br>• document protection<br>• drawing<br>• forms with fields<br>• hyperlinks<br>• linked and/or embedded objects<br>• long documents<br>• mail merge data documents<br>• master documents |

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## RANGE STATEMENT

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| | • MS WordArt<br>• multiple headers and footers<br>• multiple sections<br>• multiple users<br>• primary mail merge documents<br>• subdocuments<br>• templates |
| ***Organisational requirements*** may include: | • company colour scheme<br>• company logo<br>• consistent corporate image<br>• content restrictions<br>• established guidelines and procedures for document production<br>• house styles<br>• observing copyright legislation<br>• organisation name, time, date, document title, filename, etc. in header/footer<br>• templates |
| ***Complex technical functions*** may include: | • alignment<br>• data transfer<br>• display features<br>• embedding<br>• exporting<br>• fields<br>• form fields<br>• formulae<br>• importing<br>• index<br>• linking<br>• macros<br>• merge criteria<br>• page and section breaks<br>• sort criteria<br>• style sheets<br>• table of contents<br>• templates |
| ***Design*** choices may include: | • balance<br>• diversity<br>• relative positioning of graphics and headings<br>• simplicity |

**RANGE STATEMENT**

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| | • text flow<br>• typography |
| *Structure and layout* may include: | • boxes<br>• colour<br>• columns<br>• drawing<br>• graphics<br>• headings<br>• letter and memo conventions<br>• page layout<br>• photographs<br>• typeface<br>• white space |
| *Consistency of design and layout* may include: | • annotated references<br>• borders<br>• bullet/number lists<br>• captions<br>• consistency with other business documents<br>• footnotes/endnotes<br>• indentations<br>• page numbers<br>• spacings<br>• typeface styles and point size |
| *Formatting rows and column* may include: | • auto distribute<br>• fills/shading<br>• lines and borders<br>• merge cells<br>• sorting contents<br>• split cell<br>• text direction |
| *Other data* may include: | • clip art<br>• data from other software applications<br>• digital photographs<br>• files<br>• graphics<br>• quotes<br>• references<br>• scanned photographs and logos<br>• tables, graphs and charts |

| **RANGE STATEMENT** | |
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| ***Formatting*** of other data may include: | • colour<br>• cropping<br>• layout<br>• position in relation to other text<br>• size |
| ***Printing*** may include: | • print merge<br>• print to file<br>• to fit specific number of pages<br>• with comments<br>• with drawing objects<br>• with field codes<br>• with hidden text |
| ***Naming and storing documents*** may include: | • authorised access<br>• file names according to organisational procedure e.g. numbers rather than names<br>• file names which are easily identifiable in relation to the content<br>• file/directory names which identify the operator, author, section, date etc.<br>• filing locations<br>• organisational policy for backing up files<br>• organisational policy for filing hard copies of documents<br>• security<br>• storage in folders/sub-folders<br>• storage on hard/floppy disk drives, CD-ROM, tape back-up |
| ***Designated time lines*** may include: | • time line agreed with internal/external client<br>• time line agreed with supervisor/person requiring spreadsheet<br>• organisational time line e.g. deadline requirements |

# Unit Sector(s)

| **Unit sector** | |
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# Competency field

| Competency field | Information and Communications Technology - IT Use |
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# Co-requisite units

| Co-requisite units | | |
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