



Australian Government

Department of Education, Employment and Workplace Relations

BSBADM402A Produce complex business documents

Release: 1

Modification History

Not Available

INTRODUCTION

Unit Descriptor This unit covers design and development of business documents using complex technical features of word processing and/or desktop publishing software.

This unit is related to BSBADM304A Design and develop text documents and BSBADM506A Manage business document design and development.

Competency Field Business Administration Services

Element	Performance Criteria
1. Use safe work practices	1.1 Workspace, furniture and equipment are adjusted to suit the ergonomic requirements of the user 1.2 Work organisation meets organisational and statutory requirements for computer operation 1.3 Energy and resource conservation techniques are used to minimise wastage in accordance with organisational and statutory requirements
2. Analyse document requirements	2.1 Organisational and task requirements are identified prior to document design 2.2 Complex technical functions of the software are evaluated for their usefulness in fulfilling the requirements of the task 2.3 Document requirements are matched with software functions to provide efficient production of documents
3. Design complex documents	3.1 Document structure and layout are designed to suit the purpose, audience and information requirements of the task 3.2 Document is designed to enhance readability and appearance and meet organisational and task requirements for style and layout 3.3 Complex software functions are used to enable efficient manipulation of information and other material and ensure consistency of design and layout 3.4 Manuals, user documentation and on-line help are used to overcome problems with document design and production
4. Produce documents	4.1 Complex operations used in development of documents achieve required results 4.2 Documents are previewed, adjusted and printed in accordance with

organisational and task requirements

4.3 Documents are named and stored, in accordance with organisational requirements and the application exited without information loss/damage.

4.4 Documents are prepared within designated timelines and organisational requirements for speed and accuracy.

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
Complex documents may include:	• long documents • multiple sections • multiple headers and footers • different odd and even pages • master documents • subdocuments • primary mail merge documents • mail merge data documents • templates • multiple users • hyperlinks • concordance files • document protection • linked and/or embedded objects • captions • call outs • drawing • WordArt • forms with fields
Software may include:	• wordprocessing • advanced desktop publishing
Organisational policy and procedures may include:	• log-on procedures • password protection

	• storage / location of data • standard formats • author's instructions • use of templates
Ergonomic requirements may include:	• workstation height and layout • chair height, seat and back adjustment • footrest • screen position • keyboard and mouse position • document holder • posture • avoiding radiation from computer screens • lighting • noise minimisation
Work organisation may include:	• mix of repetitive and other activities • rest periods • exercise breaks
Conservation techniques may include:	• double-sided paper use • re-used paper for rough drafts (observing confidentiality requirements) • recycling used and shredded paper • utilising power-save options for equipment
Organisational requirements may include:	• consistent corporate image • company logo • company colour scheme • established guidelines and procedures for document production • 'house styles' • content restrictions • templates • organisation name, time, date, document title, filename, etc in header / footer • observing copyright legislation
Complex technical functions	• table of contents

may include:

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

Structure and layout may include:

- white space
- typeface
- graphics
- photographs
- drawing
- boxes
- colour
- page layout
- headings
- columns
- letter and memo conventions

Design choices may include:

- simplicity
- diversity
- balance
- typography
- text flow
- relative positioning of graphics and headings

Consistency of design and layout may include:

- indentations
- spacings
- page numbers
- typeface styles and point size
- captions

- bullet/ number lists
- footnotes/endnotes
- annotated references
- borders
- consistency with other business documents

Printing may include:

- with drawing objects
- with comments
- with hidden text
- with field codes
- to fit specific number of pages
- print to file
- print merge
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Naming and storage of documents may include:

- file names which are easily identifiable in relation to the content
- file/directory names which identify the operator, author, section, date etc
- file names according to organisational procedure eg numbers rather than names
- storage in folders / sub-folders
- storage on hard/floppy disk drives, CD ROM, tape backup
- organisation policy for backing up files
- organisation policy for filing hard copies of documents
- filing locations
- security
- authorised access

Designated timelines may include:

- timeline agreed with supervisor/person requiring spreadsheet
- timeline agreed with internal/external client
- organisation timeline eg deadline requirements

EVIDENCE GUIDE

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

Critical Aspects of Evidence	• Integrated demonstration of all elements of competency and their performance criteria • Knowledge and application of complex software functions
Underpinning Knowledge* * At this level the learner must demonstrate understanding of a broad knowledge base incorporating some theoretical concepts.	• 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 • Advanced functions of wordprocessing and/or desktop publishing software applications • Impact of formatting and design on the presentation and readability of documents • Organisational policies and procedures
Underpinning Skills	• Literacy skills to interpret and evaluate the purposes and objectives of various types of software; consider aspects of context, purpose and audience when generating and formatting texts; display logical organisation of written information through the use of coherently linked paragraphs; use a variety of strategies for planning and reviewing own work; demonstrate drafting techniques; use simple and complex syntactic structures; select vocabulary to create nuances of meaning in particular contexts • Proofreading and editing skills to ensure clarity of meaning and conformity to organisational requirements; check for accuracy and consistency of information by consulting additional resources • Problem solving skills to use processes flexibly and interchangeably • Numeracy skills to collate and present data; graphs and annotated references • Communication skills to follow complex oral instructions when using technology; listen to and interpret complex sequenced instructions • Keyboarding skills • 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 which may include: • Workplace references such as computer user manuals, organisational policies and procedures and workplace procedural manuals • Computer equipment including relevant software, printer • Guide/examples of 'house style' • Equipment (eg paper and other materials)
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

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 1	Level 1	Level 1	Level 1	Level 2	Level 2

Three levels of performance denote level of competency required to perform a task.

1. Perform 2. Administer 3. Design

- Collecting, analysing and organising information – to determine document requirements
- Communicating ideas and information – through well-designed business documents
- Planning and organising activities – to meet designated timelines
- Working with teams and others – to determine document purpose and audience
- Using mathematical ideas and techniques – to determine design requirements
- Solving problems – using manuals and on-line help
- Using technology – to produce complex business documents

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