❖ **General Description**

This publication has been mapped to the **BSBADM506 - Manage Business Document Design And Development** competency. It 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 within an organisation.

❖ **Learning Outcomes**

At the completion of this course you should be able to:

- understand the importance of establishing and using document standards
- work with multiple documents
- work with a **PDF** document
- insert content from other sources
- create and use templates
- create and use building blocks
- use table features to improve the layout and format of tables
- create and edit recipient lists
- customise mail merges
- create, use and delete bookmarks
- understand, insert and work with fields in a document
- create and use interactive fields.
- use a range of document proofing features
- use **AutoCorrect** to automatically correct words and phrases
- use reviewing and commenting tools when editing documents
- understand and use the tracking feature in **Word**
- create and work with electronic forms in **Word**
- create and work with macros

❖ **Prerequisites**

BSBADM506 Manage Business Document Design And Development assumes a good working understanding of Microsoft Word 2016.

❖ **Topic Sheets**

196 topics

❖ **Methodology**

The InFocus series of publications have been written with one topic per page. Topic sheets either contain relevant reference information, or detailed step-by-step instructions designed on a real-world case study scenario. Publications can be used for instructor-led training, self-paced learning, or a combination of the two.

❖ **Formats Available**

A4 Black and White, A5 Black and White (quantity order only), A5 Full Colour (quantity order only), Electronic Licence

❖ **Companion Products**

There are a number of complementary titles in the same series as this publication. Information about other relevant publications can be found on our website at **www.watsoniapublishing.com**.

Product Information

INFOCUS COURSEWARE

*This information sheet was produced on Tuesday, December 19, 2017 and was accurate at the time of printing. Watsonia Publishing reserves its right to alter the content of the above courseware without notice.*

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## Product Information

## Unit Mapping

This unit describes the 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.

| | Performance Criteria | Location |
|---|---|---|
| **1** | **Establish documentation standards** | |
| 1.1 | Identify organisational and legislative requirements for information entry, storage, output, and quality of document design and production | Chapter 1: Document Standards |
| 1.2 | Evaluate organisation's present and future information technology capability in terms of its impact on document design and production | Generally assumed throughout |
| 1.3 | Identify types of documents used and required by the organisation | Chapter 1: Document Standards |
| 1.4 | Establish documentation standards and design tasks for organisational documents in accordance with information, budget and technology requirements | Chapter 1: Document Standards |
| **2** | **Manage template design and development** | |
| 2.1 | Ensure standard formats and templates suit the purpose, audience and information requirements of each document | Chapter 5: Templates |
| 2.2 | Ensure document templates enhance readability and appearance, and meet organisational requirements for style and layout | Chapter 5: Templates |
| 2.3 | Test templates, obtain organisational and user feedback, and make amendments as necessary to ensure maximum efficiency and quality of presentation | Chapter 5: Templates |
| **3** | **Develop standard text for documents** | |
| 3.1 | Evaluate complex technical functions of software for their usefulness in automating aspects of standard document production | Chapter 6: Building Blocks |

| | Performance Criteria | Location |
|---|---|---|
| 3.2 | Match requirements of each document with software functions to allow efficient production of documents | Chapter 7: Table Features, Chapter 8: Mail Merge Recipient Lists, Chapter 9: Mail Merge Techniques, Chapter 10: Bookmarks, Chapter 11: Fields, Chapter 12: Interactive Fields, Chapter 17: Electronic Forms |
| 3.3 | Test macros to ensure they meet the requirements of each document in accordance with documentation standards | Chapter 18: Macros |
| **4** | **Develop and implement strategies to ensure the use of standard documentation** | |
| 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 | Chapter 1: Document Standards, Chapter 5: Templates, Chapter 18: Macros |
| 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 | Chapter 5: Templates, Chapter 18: Macros |
| 4.3 | Produce, circulate, name and store master files and print copies of templates and macros in accordance with organisational requirements | Chapter 1: Document Standards |
| **5** | **Develop and implement strategies for maintenance and continuous improvement of standard documentation** | |
| 5.1 | Monitor use of standard documentation templates and macros, and evaluate the quality of documents produced against documentation standards | Chapter 1: Document Standards, Chapter 2: Multiple Documents, Chapter 3: Working With PDF Documents, Chapter 4: Importing |
| 5.2 | Review documentation standards against the changing needs of the organisation, and plan and implement improvements in accordance with organisational procedures | Chapter 1: Document Standards |

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