



INFOCUS COURSEWARE

# BSBADM506B Manage Business Document Design And Development

Microsoft Word 2013



WATSONIA PUBLISHING

Product Code: INF935

ISBN: 978-1-925121-05-6

## ❖ General Description

This publication has been mapped to the **BSBADM506B - 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 Microsoft Word.

## ❖ Learning Outcomes

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

- understand how to establish and work with document standards and document properties
- work with multiple documents
- create and use templates
- create and use building blocks
- use table features to improve the layout and format of tables
- customise mail merges
- understand, insert and work with fields in a document
- use a range of document proofing features
- understand and use the tracking feature in **Word**
- create and work with electronic forms in **Word**
- create and work with macros

## ❖ Prerequisites

BSBADM506B Manage Business Document Design And Development assumes a good working understanding of Microsoft Word 2013. It would also be beneficial to have a general understanding of personal computers and the Windows operating system environment.

## ❖ Topic Sheets

189 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](http://www.watsoniapublishing.com).

*This information sheet was produced on Monday, April 27, 2015 and was accurate at the time of printing. Watsonia Publishing reserves its right to alter the content of the above courseware without notice.*



47 Greenaway Street  
Bulleen VIC 3105  
Australia  
ABN 64 060 335 748

Phone: (+61) 3 9851 4000  
Fax: (+61) 3 9851 4001  
[info@watsoniapublishing.com](mailto:info@watsoniapublishing.com)  
[www.watsoniapublishing.com](http://www.watsoniapublishing.com)

Product Information



INFOCUS COURSEWARE

# BSBADM506B Manage Business Document Design And Development

Microsoft Word 2013



WATSONIA PUBLISHING

Product Code: INF935

ISBN: 978-1-925121-05-6

## Contents

### Document Standards

- Types of Business Documents
- Understanding Word Processing
- Types of Word Processed Documents
- How Spreadsheets Work
- The Appropriateness of Spreadsheets
- Choosing Appropriate Software
- Who Prepares Business Documents
- Speeding Up Document Production
- Establishing Document Standards
- Practice Exercise
- Practice Exercise Workspace

### Multiple Documents

- Opening Multiple Documents
- Switching Between Open Documents
- Arranging All
- Viewing Side by Side
- Synchronised Scrolling
- Resetting the Window Position
- Practice Exercise
- Practice Exercise Sample
- Understanding PDF Documents
- Saving a Document as a PDF
- Viewing a PDF File in Reader
- Practice Exercise
- Practice Exercise Sample
- Understanding Importing
- Importing Text
- Importing Excel Data
- Importing and Linking Excel Data
- Importing and Embedding Excel Data
- Modifying Embedded Excel Data
- Practice Exercise
- Practice Exercise Sample

### Templates

- Understanding Templates
- Using a Sample Template
- Downloading an Online Template
- Creating a Template
- Modifying a Template
- Using a Custom Template
- Attaching a Template to a Document
- Copying Styles Between Templates
- Creating a Template From a Template
- Tips for Developing Templates
- Practice Exercise

Practice Exercise Sample

### Building Blocks

- Understanding Building Blocks
- AutoText Versus Quick Parts
- Inserting a Building Block
- Creating Quick Parts
- Saving Building Blocks
- Inserting Quick Parts
- Editing Building Blocks
- Deleting Building Blocks
- Practice Exercise
- Practice Exercise Data

### Table Features

- Creating a Table From Text
- Aligning Data in Cells
- Displaying Table Gridlines
- Inserting Formulas Into a Table
- Updating Formulas in a Table
- Sorting Table Data
- Merging Table Cells
- Splitting Table Cells
- Understanding Table Properties
- Aligning Tables
- Changing the Direction of Text
- Repeating Heading Rows
- Converting a Table to Text
- Practice Exercise
- Practice Exercise Sample

### Mail Merge Techniques

- Understanding Recipient Lists
- Creating a Recipient List
- Customising the Columns
- Adding Records
- Deleting Records
- Saving a Recipient List
- Practice Exercise
- Practice Exercise Data
- Running a Saved Merge
- Excluding Recipients
- Filtering Recipients
- Sorting Recipients
- Selecting Another Data Source
- Applying an if Then Else Rule
- Applying a Fill in Rule
- Practice Exercise
- Practice Exercise Data

### Fields

- Creating Bookmarks
- Navigating With Bookmarks
- Deleting Bookmarks
- Practice Exercise
- Practice Exercise Sample
- Understanding Fields
- The Field Dialog Box
- Inserting a Document Information Field
- Setting Field Properties
- Showing and Hiding Field Codes
- Showing and Hiding Field Shading
- Inserting Formula Fields
- Inserting a Date and Time Field
- Updating Fields Automatically When Printing
- Locking and Unlocking Fields
- Applying a Number Format
- Practice Exercise
- Practice Exercise Sample
- Understanding Interactive Fields
- Inserting a FILLIN Field
- Typing Field Codes Into a Document
- Activating Interactive Fields
- Inserting an ASK Field
- Using REF to Display Bookmarks
- Activating Fields Automatically
- Practice Exercise
- Practice Exercise Sample

### Document Proofing Features

- Proofreading Your Document
- Using Proofreading Marks
- Disabling the Spelling and Grammar Checker
- Customising the Spelling Checker
- Customising the Grammar Checker
- Using the Thesaurus
- Setting a Different Proofing Language
- Translating Selected Text
- Setting the Default Language
- Practice Exercise
- Practice Exercise Data
- Understanding AutoCorrect
- Using AutoCorrect
- Adding AutoCorrect Entries
- Using Math AutoCorrect



47 Greenaway Street  
Bulleen VIC 3105  
Australia  
ABN 64 060 335 748

Phone: (+61) 3 9851 4000  
Fax: (+61) 3 9851 4001  
[info@watsoniapublishing.com](mailto:info@watsoniapublishing.com)  
[www.watsoniapublishing.com](http://www.watsoniapublishing.com)

## Product Information



INFOCUS COURSEWARE

# BSBADM506B Manage Business Document Design And Development

Microsoft Word 2013



Product Code: INF935

ISBN: 978-1-925121-05-6

Understanding AutoFormat  
Using AutoFormat  
Using AutoFormat as You Type  
Practice Exercise  
Practice Exercise Sample

## Tracking Changes

Highlighting Text  
Inserting Comments  
Working With Comments  
Practice Exercise  
Practice Exercise Sample  
Understanding Tracking Changes  
Enabling and Disabling Tracked  
Changes  
Switching Between Simple Markup  
and All Markup  
Using Comments in Tracked Changes  
Showing and Hiding Markup  
Showing Revisions Inline and in  
Balloons  
Advanced Tracking Options  
Accepting and Rejecting Changes  
Practice Exercise  
Practice Exercise Sample

## Electronic Forms

Understanding Electronic Forms in  
Word  
Creating the Form Layout  
Understanding Content Controls  
Displaying the Developer Tab  
Inserting Text Controls  
Setting Content Control Properties  
Inserting the Date Picker Control  
Inserting Prompt Text  
Inserting Formulas  
Inserting a Combo Box Control  
Inserting a Drop Down List Control  
Protecting and Saving the Form  
Using an Electronic Form  
Editing a Protected Form  
Practice Exercise  
Practice Exercise Data

## Macros

Understanding Macros in Word  
Setting Macro Security  
Saving a Document as Macro-  
Enabled  
Recording a Macro  
Running a Macro

Assigning a Macro to the Toolbar  
Assigning a Keyboard Shortcut to a  
Macro  
Editing a Macro  
Creating a MacroButton Field  
Copying a Macro  
Deleting a Macro  
Tips for Developing Macros  
Practice Exercise  
Practice Exercise Data



47 Greenaway Street  
Bulleen VIC 3105  
Australia  
ABN 64 060 335 748

Phone: (+61) 3 9851 4000  
Fax: (+61) 3 9851 4001  
[info@watsoniapublishing.com](mailto:info@watsoniapublishing.com)  
[www.watsoniapublishing.com](http://www.watsoniapublishing.com)

Product Information



# BSBADM506B Manage Business Document Design And Development

Microsoft Word 2013



INFOCUS COURSEWARE

Product Code: INF935

ISBN: 978-1-925121-05-6

## Unit Mapping

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.

	Performance Criteria	Location
<b>1</b>	<b>Establish documentation standards</b>	
1.1	Identify organisational 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 effect 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
<b>2</b>	<b>Manage template design and development</b>	
2.1	Ensure standard formats and templates suit the purpose, audience and information requirements of each document	Chapter 3: Templates
2.2	Ensure document templates enhance readability and appearance, and meet organisational requirements for style and layout	Chapter 3: Templates
2.3	Test templates, obtain organisational and user feedback, and make amendments as necessary to ensure maximum efficiency and quality of presentation	Chapter 3: Templates
<b>3</b>	<b>Develop standard text for documents</b>	
3.1	Evaluate complex technical functions of software for their usefulness in automating aspects of standard document production	Chapter 4: Building Blocks
3.2	Match requirements of each document with software functions to allow efficient production of documents	Chapter 5: Table Features, Chapter 6: Mail Merge Techniques, Chapter 7: Fields, Chapter 10: Electronic Forms
3.3	Test macros to ensure they meet the requirements of each document in accordance with documentation standards	Chapter 11: Macros
<b>4</b>	<b>Develop and implement strategies to ensure the use of standard documentation</b>	
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 3: Templates, Chapter 11: 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 3: Templates, Chapter 11: 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
<b>5</b>	<b>Develop and implement strategies for maintenance and continuous improvement of standard documentation</b>	
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
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

## Product Information



47 Greenaway Street  
Bulleen VIC 3105  
Australia  
ABN 64 060 335 748

Phone: (+61) 3 9851 4000  
Fax: (+61) 3 9851 4001  
[info@watsoniapublishing.com](mailto:info@watsoniapublishing.com)  
[www.watsoniapublishing.com](http://www.watsoniapublishing.com)