



INFOCUS COURSEWARE

# BSBITU306 Design And Produce Business Documents

Microsoft Word and Excel 2016



Product Code: INF1747

ISBN: 978-1-925526-75-2

## ❖ General Description

This publication has been mapped to the **BSBITU306 - Design And Produce Business Documents** competency. It applies to individuals who may exercise discretion and judgement using appropriate theoretical knowledge of document design and production to provide technical advice and support to a team.

## ❖ Learning Outcomes

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

- understand the importance of establishing and using document standards
- work safely with your computer, consider your impact on the environment and manage files and folders efficiently
- understand the general features of **Office 2013** and how to use them
- obtain help for **Word** whenever you need it
- work with the basic features of **Word**
- select and work with text in a document
- cut and copy information within and between documents
- check the spelling and grammar of a document
- use a range of font formatting techniques
- work effectively with features that affect the page layout of your document
- apply various page layout techniques
- insert headers and footers into a document
- create and apply styles
- work with tabs
- create and modify tables
- perform a mail merge from scratch
- customise mail merges
- save various kinds of documents
- create and work with a new workbook
- understand, create and work with formulas and functions
- use font formatting techniques
- apply borders to cells and ranges in a worksheet
- format rows and columns in a worksheet
- align the contents of cells in a number of ways
- understand and use the number formatting features in **Excel**
- print your workbook data
- apply a variety of page setup techniques
- create effective charts in **Microsoft Excel**
- create a range of common charts

## ❖ Prerequisites

BSBITU306 Design And Produce Business Documents assumes some knowledge of both Microsoft Word 2016 and Microsoft Excel 2016, as well as fundamental skills in computer operations.

## ❖ Topic Sheets

347 topics



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

## BSBITU306 Design And Produce Business Documents

Microsoft Word and Excel 2016



Product Code: INF1747

ISBN: 978-1-925526-75-2

### ❖ 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, January 22, 2018 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



# BSBITU306 Design And Produce Business Documents

Microsoft Word and Excel 2016



INFOCUS COURSEWARE

Product Code: INF1747

ISBN: 978-1-925526-75-2

## 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
- Challenge Exercise
- Challenge Exercise Workspace

### General Computer Operation

- Setting Up an Ergonomic Workstation
- Breaks and Exercises
- Reducing Paper Wastage
- Environmentally Friendly Computing
- Backup Procedures
- Challenge Exercise
- Challenge Exercise Workspace

### At Home in Office 2016

- Understanding Microsoft Office 2016
- Starting an Office 2016 Application
- Understanding Dialog Boxes
- Using the Ribbon
- Using Ribbon KeyTips
- Understanding the Backstage View
- Understanding the Quick Access Toolbar
- Exiting Safely From Word
- Challenge Exercise
- Challenge Exercise Sample

### Getting Help

- Understanding How Help Works
- Using Tell Me
- Accessing the Help Window
- Navigating the Help Window
- Using Google to Get Help
- Printing a Help Topic
- Challenge Exercise
- Challenge Exercise Sample

### Getting Started With Word

- Starting Word From the Desktop
- Understanding the Start Screen

- Creating a New Blank Document
- The Word Screen
- How Microsoft Word 2016 Works
- Using the Ribbon
- Showing and Collapsing the Ribbon
- Understanding the Backstage View
- Accessing the Backstage View
- Using Shortcut Menus
- Understanding Dialog Boxes
- Launching Dialog Boxes
- Understanding the Quick Access Toolbar
- Adding Commands to the QAT
- Using a Sample Template
- Challenge Exercise
- Challenge Exercise Workspace

### Working With Text

- Techniques for Selecting Text
- Selecting Text Using the Mouse
- Selecting Text Using the Keyboard
- Editing Text in Insert Mode
- Editing Text in Overtyping Mode
- Deleting Text
- Using Undo
- Inserting Symbols and Special Characters
- Finding Words
- The Find and Replace Dialog Box
- Replacing Words
- Challenge Exercise
- Challenge Exercise Sample

### Cutting and Copying

- Understanding Cutting and Copying
- Cutting and Pasting
- Copying and Pasting
- Copying Between Documents
- Challenge Exercise
- Challenge Exercise Sample

### Spelling and Grammar

- Understanding Spelling and Grammar
- Correcting Spelling Errors
- Correcting Contextual Errors
- Correcting Grammatical Errors
- Performing a Spelling and Grammar Check

- Challenge Exercise
- Challenge Exercise Sample

### Text Appearance

- Understanding Font Formatting
- Understanding Font Formatting Tools
- Changing Fonts
- Changing Font Size
- Making Text Bold
- Italicising Text
- Using the Format Painter
- Understanding Paragraph Formatting
- Changing Text Alignments
- Changing Paragraph Spacing
- Challenge Exercise
- Challenge Exercise Sample

### Working With Pages

- Changing Page Margins
- Changing Page Orientation
- Changing Paper Sizing
- Inserting Page Breaks
- Inserting Page Numbers
- Formatting Page Numbers
- Challenge Exercise
- Challenge Exercise Sample

### Page Techniques

- Inserting a Cover Page
- Inserting a Watermark
- Applying Page Colours
- Applying a Page Border
- Understanding Section Breaks
- Inserting a Next Page Section Break
- Inserting a Continuous Section Break
- Inserting an Even Page Section Break
- Inserting an Odd Page Section Break
- Challenge Exercise
- Challenge Exercise Sample

### Headers and Footers

- Inserting a Blank Header
- Inserting a Blank Footer
- Switching Between Headers and Footers
- Editing Headers and Footers
- Understanding Columns
- Creating Columns of Text
- Challenge Exercise
- Challenge Exercise Sample



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



# BSBITU306 Design And Produce Business Documents

Microsoft Word and Excel 2016



INFOCUS COURSEWARE

Product Code: INF1747

ISBN: 978-1-925526-75-2

## Styles

- Understanding Styles
- Applying Paragraph Styles
- Applying Character Styles
- Creating a Quick Style
- Creating a Paragraph Style
- Creating a Character Style
- Applying Custom Styles
- Understanding Themes
- Applying a Theme
- Challenge Exercise
- Challenge Exercise Sample

## Tabs

- Using Default Tabs
- Setting Tabs on the Ruler
- Modifying Tabs on the Ruler
- Setting Tabs in the Tabs Dialog Box
- Challenge Exercise
- Challenge Exercise Data

## Tables

- Understanding Tables
- Creating a Table
- Adding Data to a Table
- Selecting in Tables Using the Ribbon
- Selecting in Tables Using the Mouse
- Inserting Columns and Rows
- Deleting Columns and Rows
- Changing Column Widths
- Changing Row Heights
- Autofitting Columns
- Shading Cells
- Modifying Borders
- Adding Custom Borders
- Choosing a Table Style
- Challenge Exercise
- Challenge Exercise Data

## Merging From Scratch

- Understanding Merging From Scratch
- Selecting the Document Type
- Selecting the Recipients
- Inserting the Date
- Inserting an Address Block
- Inserting the Greeting Line
- Typing the Letter
- Inserting Individual Merge Fields
- Previewing the Merge
- Completing the Merge
- Challenge Exercise
- Challenge Exercise Sample

## Mail Merge Techniques

- 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
- Challenge Exercise
- Challenge Exercise Data

## Saving Documents

- Understanding the Windows Filing Structure
- Understanding Naming Conventions
- Understanding Version Compatibility
- The Open Place
- The Open Dialog Box
- Opening an Existing Document
- Saving With a Different File Name
- Saving in a Different Location
- Saving a Document for Version Compatibility
- Challenge Exercise
- Challenge Exercise Workspace

## Creating a New Workbook

- The Characteristics of a Spreadsheet
- What a Spreadsheet Can Do
- Understanding Workbooks
- Using the Blank Workbook Template
- Typing Text
- Typing Numbers
- Typing Dates
- Understanding the Fill Handle
- Typing Formulas
- Easy Formulas
- Saving a New Workbook on Your Computer
- Checking the Spelling
- Making Basic Changes
- Printing a Worksheet
- Safely Closing a Workbook
- Challenge Exercise
- Challenge Exercise Sample

## Formulas and Functions

- Understanding Formulas
- Creating Formulas That Add
- Creating Formulas That Subtract
- Formulas That Multiply and Divide
- Understanding Functions

- Using the SUM Function to Add
- Summing Non-Contiguous Ranges
- Calculating an Average
- Finding a Maximum Value
- Finding a Minimum Value
- Creating More Complex Formulas
- Challenge Exercise
- Challenge Exercise Sample

## Font Formatting

- Understanding Font Formatting
- Working With Live Preview
- Changing Fonts
- Changing Font Size
- Growing and Shrinking Fonts
- Making Cells Bold
- Italicising Text
- Underlining Text
- Changing Font Colours
- Changing Background Colours
- Using the Format Painter
- Challenge Exercise
- Challenge Exercise Sample

## Applying Borders

- Understanding Borders
- Applying a Border to a Cell
- Applying a Border to a Range
- Applying a Bottom Border
- Applying Top and Bottom Borders
- The More Borders Command
- Challenge Exercise
- Challenge Exercise Sample

## Row and Column Formatting

- Approximating Column Widths
- Setting Precise Columns Widths
- Approximating Row Height
- Setting Precise Row Heights
- Hiding Rows and Columns
- Unhiding Rows and Columns
- Challenge Exercise
- Challenge Exercise Sample

## Cell Alignment

- Understanding Cell Alignment
- Horizontal Cell Alignment
- Vertical Cell Alignment
- Rotating Text
- Indenting Cells
- Wrapping and Merging Text
- Unmerging Cells



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



# BSBITU306 Design And Produce Business Documents

Microsoft Word and Excel 2016



INFOCUS COURSEWARE

Product Code: INF1747

ISBN: 978-1-925526-22-6

Challenge Exercise  
Challenge Exercise Sample

## Number Formatting

Understanding Number Formatting  
Applying General Formatting  
Formatting for Money  
Formatting Percentages  
Formatting as Fractions  
Formatting as Dates  
Using the Thousands Separator  
Increasing and Decreasing Decimals  
Applying Alternate Currencies  
Challenge Exercise  
Challenge Exercise Sample

## Printing

Understanding Printing  
Previewing Before You Print  
Selecting a Printer  
Printing a Range  
Printing an Entire Workbook  
Specifying the Number of Copies  
The Print Options  
Challenge Exercise  
Challenge Exercise Sample

## Page Setup

Understanding Headers and Footers  
Adding a Quick Header  
Adding a Quick Footer  
Adding Page Numbering  
Strategies for Printing Worksheets  
Understanding Page Layout  
Using Built in Margins  
Changing Margins by Dragging  
Centring on a Page  
Changing Orientation  
Setting the Print Area  
Clearing the Print Area  
Inserting Page Breaks  
Using Page Break Preview  
Removing Page Breaks  
Settings Rows as Repeating Print Titles  
Clearing Print Titles  
Scaling to a Percentage  
Fit to a Specific Number of Pages  
Challenge Exercise  
Challenge Exercise Sample

## Creating Charts

Understanding the Charting Process  
Choosing the Right Chart  
Using a Recommended Chart  
Working With an Embedded Chart  
Resizing a Chart  
Repositioning a Chart  
Printing an Embedded Chart  
Creating a Chart Sheet  
Changing the Chart Type  
Changing the Chart Layout  
Changing the Chart Style  
Printing a Chart Sheet  
Embedding a Chart Into a Worksheet  
Deleting a Chart  
Challenge Exercise  
Challenge Exercise Sample

## Common Chart Types

Understanding Common Chart Types  
Creating a Column Chart  
Creating a Line Chart  
Creating a Pie Chart  
Creating a Bar Chart  
Creating an Area Chart  
Creating a Scatter Chart  
Understanding Other Chart Types  
Challenge Exercise  
Challenge Exercise Sample



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



# BSBITU306 Design And Produce Business Documents

Microsoft Word and Excel 2016



INFOCUS COURSEWARE

Product Code: INF1747

ISBN: 978-1-925526-22-6

## Unit Mapping

This unit describes the skills and knowledge required to design and produce various business documents and publications. It includes selecting and using a range of functions on a variety of computer applications.

|          | Performance Criteria  | Location  |
|----------|---|---|
| <b>1</b> | <b>Select and prepare resources</b>   |   |
| 1        | Select and use appropriate technology and software applications to produce required business documents                  | Chapter 1: Document Standards   |
| 1        | Select layout and style of publication according to information and organisational requirements                         | Chapter 1: Document Standards, Chapter 19: Creating Business Documents  |
| 2        | Ensure document design is consistent with company and/or client requirements, using basic design principles             | Chapter 1: Document Standards   |
| 3        | Discuss and clarify format and style with person requesting document/publication  | Generally assumed throughout  |
| 4        |   |   |
| <b>2</b> | <b>Design document</b>  |   |
| 2        | Identify, open and generate files and records according to task and organisational requirements                         | Generally assumed throughout, Chapter 1: Document Standards, Chapter 18: Saving Documents   |
| 1        | Design document to ensure efficient entry of information and to maximise the presentation and appearance of information | Chapter 1: Document Standards, Chapter 5: Getting Started With Word, Chapter 18: Saving Documents, Chapter 19: Creating Business Documents, Chapter 20: Creating a New Workbook |
| 2        | Use a range of functions to ensure consistency of design and layout   | Chapter 9: Text Appearance, Chapter 13: Styles  |
| 3        | Operate input devices within designated requirements  | Generally assumed throughout  |
| 2        |   |   |
| 4        |   |   |
| <b>3</b> | <b>Produce document</b>   |   |



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



# BSBITU306 Design And Produce Business Documents

Microsoft Word and Excel 2016



INFOCUS COURSEWARE

Product Code: INF1747

ISBN: 978-1-925526-22-6

|        | Performance Criteria   | Location  |
|--------|--|---|
| 3<br>1 | Complete document production within designated timelines according to organisational requirements                    | Generally assumed throughout, Chapter 1: Document Standards, Chapter 5: Getting Started With Word, Chapter 18: Saving Documents, Chapter 19: Creating Business Documents, Chapter 20: Creating a New Workbook |
| 3<br>2 | Check document produced to ensure it meets task requirements for style and layout                                    | Chapter 11: Page Techniques, Chapter 12: Headers and Footers, Chapter 13: Styles, Chapter 27: Printing, Chapter 28: Page Setup  |
| 3<br>3 | Store document appropriately and save document to avoid loss of data   | Chapter 18: Saving Documents  |
| 3<br>4 | Use manuals, training booklets and/or help-desks to overcome basic difficulties with document design and production  | Chapter 4: Getting Help   |
|        | <b>Finalise document</b>   |   |
| 4<br>1 | Proofread document for readability, accuracy and consistency in language, style and layout prior to final output     | Chapter 5: Getting Started With Word, Chapter 20: Creating a New Workbook   |
| 4<br>2 | Make any modifications to document to meet requirements  | Chapter 5: Getting Started With Word, Chapter 1: Document Standards, Chapter 20: Creating a New Workbook  |
| 4<br>3 | Name and store document in accordance with organisational requirements and exit application without data/loss damage | Chapter 18: Saving Documents  |
| 4<br>4 | Print and present document according to requirements   | Chapter 5: Getting Started With Word, Chapter 28: Page Setup, Chapter 11: Page Techniques, Chapter 12: Headers and Footers, Chapter 28: Page Setup  |

## 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)