



INFOCUS COURSEWARE

BSBITU306 Design And Produce Business Documents

Microsoft Word and Excel 2016



Product Code: INF1747

ISBN: 978-1-925526-22-6

❖ 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



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❖ 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.

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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
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- Understanding the Backstage View
- Understanding the Quick Access Toolbar
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Getting Help

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- Understanding the Start Screen

- Creating a New Blank Document
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- How Microsoft Word 2016 Works
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- Editing Headers and Footers
- Understanding Columns
- Creating Columns of Text
- Challenge Exercise
- Challenge Exercise Sample



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Styles

- Understanding Styles
- Applying Paragraph Styles
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- Understanding Naming Conventions
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- What a Spreadsheet Can Do
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- Typing Numbers
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- Easy Formulas
- Saving a New Workbook on Your Computer
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- Making Basic Changes
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Formulas and Functions

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- Challenge Exercise
- Challenge Exercise Sample

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- Challenge Exercise Sample

Cell Alignment

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



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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
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Applying Alternate Currencies
Challenge Exercise
Challenge Exercise Sample

Printing

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

Page Setup

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Adding a Quick Header
Adding a Quick Footer
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Changing Margins by Dragging
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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
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Resizing a Chart
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Changing the Chart Layout
Changing the Chart Style
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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



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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
1	Select and prepare resources	
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		
2	Design document	
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		
3	Produce document	



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	Performance Criteria	Location
3 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 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 3	Store document appropriately and save document to avoid loss of data	Chapter 18: Saving Documents
3 4	Use manuals, training booklets and/or help-desks to overcome basic difficulties with document design and production	Chapter 4: Getting Help
4 Finalise document		
4 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 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 3	Name and store document in accordance with organisational requirements and exit application without data/loss damage	Chapter 18: Saving Documents
4 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

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