



INFocus COURSEWARE

BSBITU306A Design And Produce Business Documents

Microsoft Word and Excel 2013



Product Code: INF932

ISBN: 978-1-925179-59-0

❖ General Description

This publication has been mapped to the **BSBITU306A - Design And Produce Business Documents** competency. It is primarily designed for people who need to know how to create meaningful business documents in both Microsoft Word and Excel. These documents can include letters, reports, brochures, flyers, and the like, including charts and graphs.

❖ 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
- understand the general features of **Office 2013** and how to use them
- create a simple word-processed document
- select and work with text in a document
- use a range of font formatting techniques
- work effectively with features that affect the page layout of your document
- create and apply styles
- create and modify tables
- perform a mail merge from scratch
- save documents in a variety of formats, locations and with different names
- create common business documents
- create a simple workbook
- understand, create and work with formulas and functions
- use font formatting techniques
- 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**

❖ Prerequisites

BSBITU306A Design And Produce Business Documents assumes some knowledge of both Microsoft Word 2013 and Microsoft Excel 2013, as well as a general understanding of personal computers and the Windows operating system.

❖ Topic Sheets

351 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.

This information sheet was produced on Monday, May 04, 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
www.watsoniapublishing.com

Product Information



BSBITU306A Design And Produce Business Documents

Microsoft Word and Excel 2013



INFOCUS COURSEWARE

Product Code: INF932

ISBN: 978-1-925179-59-0

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

At Home In Office 2013

- At Home in Office 2013
- Setting Up an Ergonomic Workstation
- Breaks and Exercises
- Reducing Paper Wastage
- Environmentally Friendly Computing
- Practice Exercise
- Practice Exercise Workspace
- Understanding Microsoft Office 2013
- Starting an Office 2013 Application
- Understanding Dialog Boxes
- Using the Ribbon
- Using Ribbon KeyTips
- Understanding the Backstage View
- Understanding the Quick Access Toolbar
- Practice Exercise
- Practice Exercise Sample
- Understanding How Help Works
- Accessing the Help Window
- Navigating the Help Window
- Using the Office Website
- Googling Help
- Printing a Help Topic
- Exiting Safely From Word
- Practice Exercise
- Practice Exercise Sample

Word Processing

- Starting Word From the Desktop
- Understanding the Start Screen
- Creating a New Blank Document
- The Word Screen
- How Microsoft Word 2013 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
- Practice Exercise
- Practice 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
- Practice Exercise
- Practice Exercise Sample
- Understanding Cutting and Copying
- Cutting and Pasting
- Copying and Pasting
- Copying Between Documents
- Practice Exercise
- Practice Exercise Sample
- Understanding Spelling and Grammar
- Correcting Spelling Errors
- Correcting Contextual Errors
- Correcting Grammatical Errors
- Performing a Spelling and Grammar Check
- Practice Exercise
- Practice 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
- Practice Exercise
- Practice Exercise Sample

Working With Pages

- Changing Page Margins
- Changing Page Orientation
- Changing Paper Sizing
- Inserting Page Breaks
- Inserting Page Numbers
- Formatting Page Numbers
- Practice Exercise
- Practice Exercise Sample
- 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
- Practice Exercise
- Practice Exercise Sample
- Understanding Columns
- Creating Columns of Text
- Inserting a Blank Header
- Inserting a Blank Footer
- Switching Between Headers and Footers
- Editing Headers and Footers
- Practice Exercise
- Practice Exercise Sample

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



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
www.watsoniapublishing.com

Product Information



BSBITU306A Design And Produce Business Documents

Microsoft Word and Excel 2013



INFOCUS COURSEWARE

Product Code: INF932

ISBN: 978-1-925179-59-0

Practice Exercise
Practice Exercise Sample

Tables

Using Default Tabs
Setting Tabs on the Ruler
Modifying Tabs on the Ruler
Setting Tabs in the Tabs Dialog Box
Practice Exercise
Practice Exercise Data
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
Practice Exercise
Practice 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
Practice Exercise
Practice Exercise Sample
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

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
Practice Exercise
Practice Exercise Workspace

Creating Business Documents

Rules for Business Letters
Writing and Punctuation Standards
Letter Layout Suggestions
Creating a Business Letter
Creating a Confidential Letter
Creating a Personal Letter
Creating a Letter to the Editor
Creating a Memorandum
Creating a Facsimile
Creating Meeting Minutes
Practice Exercise
Practice Exercise Workspace

Spreadsheets

The Characteristics of a Spreadsheet
What a Spreadsheet Can Do
Starting Excel From the Desktop
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
Practice Exercise
Practice 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
Practice Exercise
Practice 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
Practice Exercise
Practice Exercise Sample
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
Practice Exercise
Practice Exercise Sample

Cell Alignment

Approximating Column Widths
Setting Precise Columns Widths
Approximating Row Height
Setting Precise Row Heights
Hiding Rows and Columns
Unhiding Rows and Columns
Practice Exercise
Practice Exercise Sample
Understanding Cell Alignment
Horizontal Cell Alignment
Vertical Cell Alignment
Rotating Text
Indenting Cells
Wrapping and Merging Text
Merging and Centring



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
www.watsoniapublishing.com

Product Information



BSBITU306A Design And Produce Business Documents

Microsoft Word and Excel 2013



INFOCUS COURSEWARE

Product Code: INF932

ISBN: 978-1-925179-59-0

Merging Cells
Unmerging Cells
Practice Exercise
Practice 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
Practice Exercise
Practice 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
Practice Exercise
Practice 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
Practice Exercise
Practice 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
Practice Exercise
Practice Exercise Sample
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
Practise Exercise
Practice Exercise Sample

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
www.watsoniapublishing.com



BSBITU306A Design And Produce Business Documents

Microsoft Word and Excel 2013



INFOCUS COURSEWARE

Product Code: INF932

ISBN: 978-1-925121-02-5

Unit Mapping

This unit describes the performance outcomes, skills and knowledge required to design and develop business documents using complex technical features of word processing software.

	Performance Criteria	Location
1	Select and prepare resources	
1.1	Select and use appropriate technology and software applications to produce required business documents	Chapter 1: Document Standards
1.2	Select layout and style of publication according to information and organisational requirements	Chapter 1: Document Standards, Chapter 11: Creating Business Documents
1.3	Ensure document design is consistent with company and/or client requirements, using basic design principles	Chapter 1: Document Standards
1.4	Discuss and clarify format and style with person requesting document/publication	Generally assumed throughout
2	Design document	
2.1	Identify, open and generate files and records according to task and organisational requirements	Generally assumed throughout, Chapter 1: Document Standards, Chapter 10: Saving Documents
2.2	Design document to ensure efficient entry of information and to maximise the presentation and appearance of information	Chapter 1: Document Standards, Chapter 3: Word Processing, Chapter 10: Saving Documents, Chapter 11: Creating Business Documents, Chapter 12: Spreadsheets
2.3	Use a range of functions to ensure consistency of design and layout	Chapter 5: Text Appearance, Chapter 7: Styles
2.4	Operate input devices within designated requirements	Generally assumed throughout
3	Produce document	
3.1	Complete document production within designated timelines according to organisational requirements	Generally assumed throughout, Chapter 1: Document Standards, Chapter 3: Word Processing, Chapter 10: Saving Documents, Chapter 11: Creating Business Documents, Chapter 12: Spreadsheets
3.2	Check document produced to ensure it meets task requirements for style and layout	Chapter 6: Working With Pages, Chapter 7: Styles, Chapter 17: Printing, Chapter 18: Page Setup
3.3	Store document appropriately and save document to avoid loss of data	Chapter 10: Saving Documents
3.4	Use manuals, training booklets and/or help-desks to overcome basic difficulties with document design and production	Chapter 2: At Home In Office 2013
4	Finalise document	
4.1	Proofread document for readability, accuracy and consistency in language, style and layout prior to final output	Chapter 3: Word Processing, Chapter 12: Spreadsheets
4.2	Make any modifications to document to meet requirements	Chapter 3: Word Processing, Chapter 1: Document Standards, Chapter 12: Spreadsheets
4.3	Name and store document in accordance with organisational requirements and exit application without data/loss damage	Chapter 10: Saving Documents
4.4	Print and present document according to requirements	Chapter 3: Word Processing, Chapter 18: Page Setup, Chapter 6: Working With Pages, Chapter 18: Page Setup



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
www.watsoniapublishing.com

Product Information