



# Candidate Resource and Assessment

## BSBITU306A

# Design and Produce Business Documents



Whether as an individual, or as part of a group, real progress depends on entering whole-heartedly into the process and being motivated to make you a more deeply satisfied human being.

*Focusing on your training needs*



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GROUP

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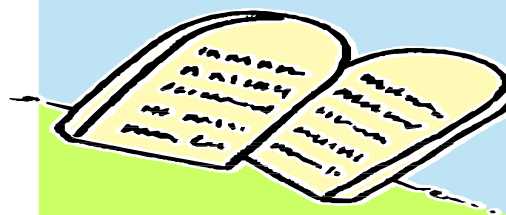
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**"You're either part of the solution or part of the problem".**

**Eldridge Cleaver**

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SAMPLE

## Focus on

# Your Area of Influence

Use considered risk taking in your 'grey' area

## And others will follow you!

<b>Legend</b>	This course is divided into several sections of learning. Each section begins with the title of the element of the unit being taught, a quotation and a graphic related to content across the top of the page.
	This symbol indicates the beginning of new content. The bold title matches the content of the competency and they will help you to find the section to reference for your assessment activities.
	<b>Activity:</b> Whenever you see this symbol, there is an activity to carry out which has been designed to help reinforce the learning about the topic and take some action.
	This symbol is used at the end of a section to indicate the summary key points of the previous section.

## Qualification Pathways



**A goal without a plan is just a wish.**

**Antoine de Saint-Exupery**

### Qualification Pathways

This unit of competency is provided to meet the requirements of BSB07 Business Services Training Package although can be used in a range of different qualifications. The BSB07 Business Services Training Package does not state how a qualification is to be achieved. Rather, Registered Training Organisations are required to use the qualification rules to ensure the needs of the learner and business customer are met. This is to be achieved through the development of effective learning programs delivered in an order which meets the stated needs of nominated candidates and business customers.

### Qualification Rules

Qualification requirements include core and elective units. The unit mix is determined by specific unit of competency requirements which are stated in the qualification description. Registered Training Organisations then work with learners and business customers to select elective units relevant to the work outcome, local industry requirements and the qualification level.

All vocational education qualifications must lead to a work outcome. BSB07 Business Services Training Package qualifications allows for Registered Training Organisations (RTOs) to vary programmes to meet:

- Specific needs of a business or group of businesses.
- Skill needs of a locality or a particular industry application of business skills.
- Maximum employability of a group of students or an individual.

When packaging a qualification elective units are to be selected from an equivalent level qualification unless otherwise stated.

## Introduction



**"If learning comes through experience, it follows that the more one participates in guided experiences, the more one learns. Therefore venturing into uncharted waters - and experiencing the failures that may occur - is an important part of organisational learning."**

**Gould, DiBella, Nevis**

### Introduction

This unit of competency is about being able to produce various business documents. It includes the skills and knowledge required to select and use a range of functions on a computer application. It will help you with the skills you need to demonstrate competency for the unit *BSBITU306A Design and Produce Business Documents*. This is one of the units that make up the Certificates in Business.

This manual is broken up into two distinct sections. They are:

- 1. Select and Prepare Resources (covering Element 1)**
- 2. Design, Produce and Finalise Document (covering Elements 2, 3 & 4)**

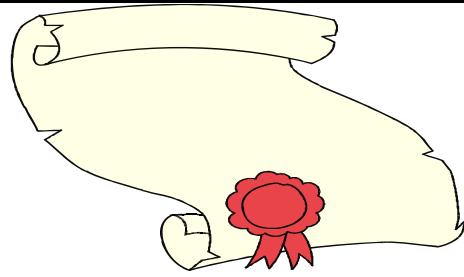
The basic act of writing seems simple to most: Put pen to paper or fingertips to keyboard. What foils many would-be authors? The defining elements of content and structure. Because most professionals are required to write memos, reports, department communications, and the like, a facility for writing effectively can have monumental results:

- Less time spent reworking documents,
- Confidence in your materials, ensuring that your audience members are getting the information they need,
- A well-informed audience,
- The ability to communicate more clearly and accurately.

At the conclusion of this training you will be asked to complete an assessment pack for this unit of competency. The information contained in this resource will assist you to complete this task.

SAMPLE

**BSBITU306A/01**  
**Select and Prepare Resources**



**"A man who publishes his letters becomes a nudist - nothing shields him from the world's gaze except his bare skin. A writer, writing away, can always fix himself up to make himself more presentable, but a man who has written a letter is stuck with it for all time."**

**E.B. White**



**Select and use appropriate technology and software applications to produce required business documents**

**Select layout and style of publication according to information and organisational requirements**

**Ensure document design is consistent with company and/or client requirements, using basic design principles**

**Discuss and clarify format and style with person requesting document/publication**

### **Planning Your Writing**

Business organisations exist to produce and distribute products, whether that product is steel, a WEB browser, an opera or anything else. In the increasingly competitive, global marketplace, businesses must constantly evolve. Rarely do business writers write to learn, to communicate what they know, or to give a glimpse of how their mind works.

Instead they write to solve problems, to propose new strategies, to store vital information, to negotiate new contracts, to map out the future direction of the company, to track quality control benchmarks, to report earnings to stakeholders, etc. Audiences for business writing - managers, employees, customers, engineers, regulatory agencies, lawyers, stockholders, etc. - do not want to exercise or monitor the growth of the writer. They want to know what to do or what the organisation is going to do next. Therefore, writing within business contexts can best be described as "transactional" or as "writing to make something happen." Business writers often recommend and support strategic courses of action to their readers.

Below is a very brief overview of some of the differences demonstrated through business writing:

- Write either at their own initiative or because someone in the organisation expects them to write. Professionals often create and define their own tasks.
- Often write for large and complex groups of people, various stakeholders who have different needs and interests.
- Write memos, letters, proposals, reports, performance evaluations, business plans, marketing plans, audit reports, sales presentations, manuals, handbooks, contracts, etc.

- Write for the organisation. The company owns the documents, which often include proprietary or confidential information.
- Meet more urgent deadlines dictated by their employers and the needs of their organisations. They often write on the job with many distractions and many constraints on what they can and cannot say.
- Solicit feedback from others before publishing their documents and often work together to compose documents.
- Often write a table of contents, an executive summary, company descriptions, industry analyses, strategic analyses, and recommendations. They structure their writing according to what their audiences need to know to do what they need to do.
- Include only what their audiences need to know and either omit the rest or include it in an appendix.
- Design their documents to be visually attractive and to allow their readers at least two ways of reading documents - quickly by scanning, or more slowly for details. They frequently incorporate more white space into their documents, make the structure of their documents visible by using headings and subheadings, and list information using bullet points. They also incorporate visual information such as graphs, charts, logos, and pictures into their documents.
- Typically write shorter, simpler sentences and include much less paragraph development if they use paragraphs at all.
- Establish a tone that best represents the ethos their company wants to project and that fits the expectations of their audience.
- The documents they produce are seldom a final product. Instead, documents are transformed into oral presentations, formal and informal meetings, overheads, reports, etc. Often other writers incorporate sections of one document into new documents. Finally, business documents are often stored on electronic databases to produce a corporate memory.

The ability to design and produce a report is a skill that you will find extremely useful, if not essential, in your professional life. Although the length, format and order of the report will vary according to its purpose and context, there are some fairly global conventions that you need to be familiar with.

To produce such documents, there are so many alternatives and much confusion. In an environment where technology poses both opportunity and risk, it's essential that you make your design and production decisions wisely. This training provides you with a process for arriving at an informed decision when choosing from the myriad of specialised and integrated products offered in today's rapidly changing marketplace.

Some of the technology that may be available to you includes computers, hand helds, scanners (flat bed, barcode, radio scanning), photocopiers and printers.

Associated software may include word processing packages, spreadsheet packages, database packages, accounting packages and special packages for making your presentation unique such as adding pictures, graphics and other techniques for publishing.

Making the choice requires you to determine what it is you want to achieve. Are you sending a short message to another in your organisation? Perhaps an email or memo would be appropriate. If you need to produce a report of a page or more, you may choose to use a computer and if there are other documents to be included in the report a scanner might be helpful. Of course, then you will need a printer so that it can be physically held and read.

Once you have produced your report, you may choose to photocopy it so that everyone has a copy - but you could email or fax it!

Below is a list of some of the many types of technology and associated software. There are many others, but these are the most common.

To Be Done	Technology to Use	Software
Send a message or longer documents and attachments to one or more colleagues	Computer, monitor, keyboard with internet / intranet access	Microsoft Outlook, Netscape Navigator
Prepare a Report	Computer, monitor, keyboard	Microsoft Word
Prepare a Report with calculations, graphics or photographs	Computer, monitor, keyboard	Microsoft Word, PowerPoint, Publisher, Excel
Print	Printer (inkjet, laser, digital)	Supplied by manufacturer
Copy a printed document	Printer or photocopier	Supplied by manufacturer
Copy a photograph	Scanner, printer, photocopier	Supplied by manufacturer
Keep records	Computer, monitor, keyboard	Microsoft Word, Access, Excel
Bookkeeping	Computer, monitor, keyboard	Microsoft Excel, MYOB, Solution Six and many others
Keep track of Inventory	Computer, monitor, keyboard	Microsoft Access, Excel

Deciding what software to use for a given document is a matter of learning – learning what is available and learning how to use it. In this section we will deal with the purpose of various software.

You don't need to be a top-notch designer to create effective letterheads and other types of documents in Microsoft Word. How many times have you seen a document or report carried out by a large company and thought how great it would be to have the resources to do the same type of campaign for your own organisation? But in reality those resources include money and personnel - which the majority of small businesses simply don't have. You can use Microsoft Office software and a printer.

This unit is concerned with preparing business documents so we are assuming that the use of this equipment will be while you are at work. Therefore you must ensure that you are aware of the expectations of your organisation with regard to the actual use of the various technologies and how it is expected the product will be stored.

## Getting Documents in Order

It's pretty obvious that business writing will expose your organisation to prospective customers and clients. This means image is critical and everything that goes out - from e-mails to letters and brochures - needs to reinforce a professional and consistent company image.

The following communication mediums can help with that and are all relatively common within today's organisations. If not available in your, then they are also usually attained at a small cost, which can be far out weighed by the benefits.

Most businesses would produce emails, letters, brochures, postcard mailers, "with compliments" slips and faxes. To do so would require this software:

- Microsoft Outlook 2003
- Microsoft Business Contact Manager for Outlook 2003
- Microsoft Word 2003
- Microsoft Publisher 2003
- Microsoft PowerPoint 2003.

## Produce Your Own Documents

**E-Mails:** E-mailing is a very popular option for communication. E-mails that arrive without a signature make it difficult for others to contact or sometimes even to recognise you. From Tools / Options it's a simple matter of clicking the Mail Format tab and then pressing the Signatures button. Ensure that the e-mail signatures for all employees follow exactly the organisational standard to ensure consistency at every possible level.

**Company Letterhead and Fax Templates:** The company letterhead template will be used for all formal correspondence. To avoid accidental changes to the layout, the company logo, name, tag line and contact details are all placed in the document's header [View / Header and Footer]. Tables are used within the header to ensure correct positioning of each of the items [Table / Insert... /Table].

Form Fields are very handy and can be used in the letterhead template to prompt for the recipient's details. For information on using form fields, Select Help / Microsoft Word Help..., select the Answer Wizard tab and type 'form fields' in the What would you like to do? text box.

Form Fields and Bookmarks are particularly useful items - for example if the recipient's name or company is used more than once in the document it saves you time re-entering information. Once the text is entered in the Form Field, Bookmarks referencing that field will automatically be updated to reflect the new text.

One of the great things in Word is the ability to specify a single location for workgroup (shared) templates. Select Tools / Options, click on the file locations tab then select the Workgroup templates entry. Click the Modify button and select the shared location.

With the letterhead complete, the next job is creating a template for fax cover sheets. The only changes to the header is to use a black-and-white version of the company logo and setting the colour of all text to black. Once the layout is complete, save it to the shared templates directory, ensuring everyone in the organisation has easy access. The end result for both jobs is clarity for the reader and consistency in maintaining a professional image.

You don't need to be a top-notch designer to create effective letterheads and other types of documents in Microsoft Word. Two of the most popular resources for creating professional documents are: Word General Templates from File / New... or by searching Microsoft's Office Online Template Gallery.

**“With Compliments Slip”, Postcard and Brochure Templates:** To complement the letterhead, you can use Publisher to create a "with compliments" slip. Instead of starting from scratch, one of Publisher's "With Compliments" templates is used and then modified to keep it in line with the style used in the letter and fax cover.

A postcard mailer would be used to deliver postcards to selected companies you would like to have as clients or perhaps as a reminder of a visit or service or product. Again, another Publisher template can be used, this time from the Postcard collection, which provides layout for both front and back of the postcard. As with all other documents, a primary objective is consistency of design and colours.

Another document that can be done in Publisher is a brochure, perhaps for service or product. You can use Publisher or the Modified Mailer template. The latter will allow you to match the brochure's look and feel with the postcard template. Again, consistency is critical.

While Word could also have been used quite effectively, the more advanced layout features of Microsoft Publisher will make the task quicker and easier.

Each organisation will have a policy unique to them on how to store the templates, who has access, what can and cannot be used and so on. Before you 're-invent the wheel', find out for yourself what the guidelines are and consistently apply them.

Over the next few pages we have provided examples of different documents that you may be asked to create in the workplace. These examples will help you with layout of these documents.

## Business Letter

Bill's Machines  
673 Any Street,  
Anytown, AT, 6000

November 12, 2008

Andrew Andrews  
Managing Director  
Andrew's Manufacturing  
19 Anyother Street  
Anytown, AT, 6000

Dear Andrew:

Your application for financing on the acquisition of your new Model 500 digital writer has been approved. Your order for one Model 500 with continuous sheet feeder will be shipped by truck within five days.

As the enclosed lease documents indicate, your monthly lease payment is \$1,870. Since your lease covers the entire purchase, including "soft" costs, installation and training are completely covered, with no additional fee or payment required.

We look forward to serving you and hope you will call upon us for service, support, and supplies. Please keep in touch and let us know how the Model 500 is working to improve sales and customer service in your shop.

Sincerely,

Bill Billomy  
Sales Manager

Enclosure

**Memo**

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**INTEROFFICE MEMORANDUM**

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**TO:** ALL STAFF  
**FROM:** ANDREW ANDREWS  
**SUBJECT:** MODEL 500 INSTALLATION  
**DATE:** 02/02/2009  
**CC:**

---

**Installation Dates for the new Model 500**

The new Model 500 will be installed in our Painting department between December 7 and December 9. This will cause some minor disruption to production during this time, but we hope to keep any disruptions to a minimum. Any questions should be directed to Mike Edwards on extn 6738

**Invoice****Bill's Machines****INVOICE****Our Machines To Yours**

673 Any Street  
 Anytown, AT, 6000  
 Phone [(509) 555-0190] Fax [(509) 555-0191]

INVOICE #[100]  
 DATE: FEBRUARY 2, 2009

**To:**

Andrews Manufacturing  
 19 Anyother Street  
 Anytown, AT, 6000

**For:**

Installation of Model 500  
 PO 37847

DESCRIPTION	HOURS	RATE	AMOUNT
Installation Costs by 3 technician (2 hours)	6	\$56	\$336.00
TOTAL			\$336.00

Make all checks payable to Bill's Machines

Total due in 15 days. Overdue accounts subject to a service charge of 1% per month.

**Thank you for your business!**

## Business Card



Of course there are many other types of document that you may be asked to produce but these examples give you a good idea on the layout of some typical documents.

There is a single golden rule to remember when developing business documents. This rule is consistency

- Same font and font size for the same heading level, eg Arial 14pt, bold for subheadings.
- Punctuation style.
- Use of capitals.
- Paragraph styles.
- Spacing.
- Paragraph numbering/bullet styles.
- Alignment.
- Margins and white space.

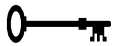
Sometimes spacing before and after headings is adjusted slightly if text is required to fit on a page. This does not usually detract from the appearance of the document. (You can use the before and After options on the [Format] Paragraph menu to adjust spacing).



### **Activity One**

Try your hand at creating some of the documents shown in this section. You can use the same text as in the sample documents. Play around with the layout so that it conforms with your organisation's layout requirements.

SAMPLE



### Key Points Section 1

- Business organisations exist to produce and distribute products, whether that product is steel, a WEB browser, an opera or anything else.
- Format and order of the report will vary according to its purpose and context.
- There are some fairly global conventions that you need to be familiar with.
- Most businesses would produce emails, letters, brochures, postcard mailers, “with compliments” slips and faxes.
- Some of the technology that may be available to you includes computers, hand helds, scanners (flat bed, barcode, radio scanning), photocopiers and printers.
- Associated software may include word processing packages, spreadsheet packages, database packages, accounting packages and special packages for making your presentation unique such as adding pictures, graphics and other techniques for publishing.
- Deciding what software to use for a given document is a matter of learning – learning what is available and learning how to use it.



## Section 1 - 'True' or 'False' Quiz



<b>T</b>	<b>F</b>	The workstation top should be big enough to allow space not only for all computer-related necessary equipment, but also for paperwork, books, and other materials needed while working at the computer.
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<b>T</b>	<b>F</b>	Ergonomic furniture need not be designed to facilitate task performance, minimise fatigue and injury by fitting equipment to the body size, strength and range of motion of the user.
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<b>T</b>	<b>F</b>	You don't need to be a top-notch designer to create effective letterheads and other types of documents in Microsoft Word.
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<b>T</b>	<b>F</b>	Form Fields are not very handy and can't be used in the letterhead template to prompt for the recipient's details.
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<b>T</b>	<b>F</b>	Deciding what software to use for a given document is a matter of learning – learning what is available and learning how to use it.
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<b>T</b>	<b>F</b>	The ability to design and produce a report is a skill that you will find extremely useful, if not essential, in your professional life.
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<b>T</b>	<b>F</b>	In the increasingly competitive, global marketplace, businesses must constantly evolve.
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<b>T</b>	<b>F</b>	A postcard mailer will be used to deliver postcards to selected companies you would like to have as clients or perhaps as a reminder of a visit or service or product.
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<b>T</b>	<b>F</b>	Business writers always write to learn, to communicate what they know, or to give a glimpse of how their mind works.
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<b>T</b>	<b>F</b>	Once you have produced your report, you would never choose to photocopy it - but you could email or fax it!
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