

Facilitator guide

BSBITU306

Design and produce business documents

Delivery date:

[Delete red guide text before distribution. **Read the Tips on pages 16-32 before starting your learner workbook.** Delete red guide text before distributing your document.]

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**TAFE NSW would like to pay our respect and acknowledge Aboriginal and Torres Strait Islander Peoples as the Traditional Custodians of the Land, Rivers and Sea. We acknowledge and pay our respect to the Elders, both past and present of all Nations.**

[Delete red guide text before distribution. Add cultural warning if required here, refer to ‘**Follow Aboriginal and Torres Strait Islander Cultural Protocol’** in the Tips section on page]

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*[Note: Delete or change all red guiding text in this document to black when you are done.]*

[Before finalising this document, update this field by right-clicking on the Table of Contents, then choose **Update Field, update entire table**.]

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Section 1   
Preparing for delivery

# About this guide

In this guide, you will find information you will need in order to prepare for and deliver this unit (or combination of units) to your learners.

# About this unit / these units

Insert information here about the unit’s purpose. If there are multiple units co-delivered ensure to address each unit’s purpose.

This guide describes the delivery strategy for the following unit(s)

1. BSBITU306 – Design and produce business documents

| Considerations for delivery | Descriptions |
| --- | --- |
| Target cohort/audience | This unit is delivered as a stand-alone unit in;  FNS30317 Certificate III in Accounts Administration (1)  FNS40217 Certificate IV in Accounting and Bookkeeping (1)  And as a clustered unit “Professional Business Documents” in;  BSB30415 Certificate 3 Business Administration  BSB31115 Certificate 3 in Business Administration (Medical)  As such the assessments are different. |
| Contextualisation | The Teaching and Learning resources have been contextualised through the use of Plan2go – A virtual organisation. Finance teachers should review FNS assessments and use their discretion regarding the teaching of Topic 5 – Presentation software. |
| Delivery mode / location | Identify the delivery mode  Online / Blended/ Classroom / Jobsite |
| Delivery timeline | X sessions of Y hours per week for Z weeks  *1 session of 3 hours for 4 weeks* |
| Assessment strategy | Describe the approach to assessment and where further details are found eg links to UAG documents |
| Start date | Enter the start date for this cohorts delivery. E.g: 9th July 2018, continuous ongoing enrolments. |

# Resources required

The table below summarises the resources required for successful delivery of this unit

| Resources required | Resource outline |
| --- | --- |
| The Facilitator will need to provide: | Insert resources that should be provided or arranged by the facilitator  **Materials**   * PowerPoint® Slides * Participant Workbooks * Other hand outs * Evaluation Form * Extra Pens and Pencils * Calculators * Assessment guide   **Equipment**   1. Data projector / smart board 2. VC or Internet access for Skype 3. Software / PC access |
| TAFE will provide the student with: | * Student portal login details / Skype access * Textbook A * TAFE Digital Campus / Adobe Connect Room |
| The student will need to provide: | * A smartphone with video recorder * Access to a worksite * Different supplies (eg art / construction) at student’s expense. |

# Planning checklist

Prior to delivery of this unit, the facilitator should ensure that:

## All delivery modes

| All delivery modes | Description |
| --- | --- |
| Before students arrive to your classroom/ worksite/ location | 1. How do students contact you? 2. Become familiar with the unit delivery structure, resources and activities 3. Ensure you are familiar with the assessment requirements |
| During delivery |  |
| Post student completion |  |

## If delivering online

| If delivering online | Description |
| --- | --- |
| Before students gain access to live unit | 1. Ensure your details are displayed correctly on TAFE Digital Campus 2. Become familiar with the unit delivery structure, resources and activities 3. Ensure you are familiar with the assessment requirements |
| During delivery | 1. Respond to student emails 2. Check your inbox for assessment submissions. Submissions of assessment must be marked within X days. 3. Monitor group chat / forum spaces 4. Review student participation reports |
| Post student completion |  |

Section 2

Unit delivery strategy

# How to use this section

[This section will help you plan the methods the “nuts and bolts” of your unit delivery. Start by planning a snap shot or overview. Break this down to more detail via a session plan and finally into further detail via the session detail section. Session details planning is especially useful if you are the designer of this unit delivery by not the facilitator. ]

Use this section to outline the high, mid and finer level details of your proposed learning and assessment delivery methods. The topic outline below can be expanded upon in the delivery schedule.

# **BSBITU306 TOPIC OUTLINE**

The following Topic outline assumes 3 hours delivery in this unit per week. Adjust according to your individual delivery schedule. If classes are spread over 18 weeks then each topic listed as one week could be done over 2 weeks with instruction and appropriate class activities to practice the topic introduced

|  |  |
| --- | --- |
| Week | Topic |
| 1 | Introduce Business Documents – types (letters/memos), layouts, Style Guides and organisation policies/procedures  Planning methods to complete documents within deadlines  File Management: Opening, Saving, Filenames, Backing-up  Identify Application Programs available for Business Documents i.e. (Word, Excel, Access, Outlook and Powerpoint – show examples)  Checking Procedures prior to finalising Documents  WORD - type basic documents & practice file management techniques (Filenames, saving) and print previewing then printing  Spellchecking and Editing/Deleting text and documents |
| 2 | WORD - Formatting options (fonts, alignment, indenting, borders)  Copying, Pasting including Paste Special options. Painter.  Spell-checking, Tabs, Bullets & Numbering  Headers and Footers  Version control, Filenames and filepaths in Footers |
| 3 | WORD - Tables & Mail Merge |
| 4 | SPREADSHEETS – Entering data, Formatting, Relative & Absolute Cell referencing, number formats, fonts, alignment |
| 5 | SPREADSHEETS –Formulas  Viewing, checking & auditing formulas  Linking Spreadsheets  Copy and Paste Link a spreadsheets into a Word Document |
| 6 | SPREADSHEETS –Charts  Copy and Paste Link a chart into a Word Document |
| 7 | POWERPOINT – Basic Slide Design  Inserting spreadsheets & Charts from excel as a linked file  Running slideshow  Printing slides and Handouts (multiple slides on a page)  Footers on Handouts |
| 8 | Students to work on AE\_Prt\_2of2 |
| 9 | Students to work on AE\_Prt\_2of2 |

# Unit delivery schedule

[Convert the Topic Outline to a delivery schedule based on your actual delivery. The table below provides a quick snapshot of the unit’s delivery schedule. This is not a detailed list, rather a snapshot of the plan for delivery. Typically this may be via weeks.]

Below is a summary for the schedule for sessions delivered in this unit.

| Session / week |  | Session Content | Outcomes |
| --- | --- | --- | --- |
| 1 | Introductions | Welcome / Getting started | * Student welcome * Overview of unit / General housekeeping * Introductory learning |
| 2 |  | Working in the XYZ industry | * Something awesome * Something relevant to the assessments as per the TP |
| 3 |  | Assessment 1 overview session | * Real time Q&A on content delivered so far * Explanation of Assessment 1 requirements |
| 4 | Topic A | Lesson 1 |  |
| 5 |  | Lesson 2 |  |
| 6 | Topic B | Lesson 1 |  |
| 7 |  | Lesson 2 |  |

Section 2

Session plans

This section provides a snap shot of each planned session. A “session” is a period of delivery that could be from as little as 1 hour, to a full day/s. This section should elaborate on the session overview details above. This section is “extractable” for easy reference by the facilitator within the learning environment.

# Session plan 1 - Welcome / Getting started

Before the session, check that you have:

* Done this task
* That task
* The other thing that you always forget about unless you look at this list for a prompt.

Update these examples!

| Item | Start Time | Duration | Topic | Main points / Key messages | Activity and references | Resources required | Criteria addressed |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 1 | 9.00 | 15 min | Welcome | * Acknowledgment of Country * Housekeeping | * Icebreaker activity | * Name tags * Balloons (icebreaker) * XYZ | * PC1.1, PE2, KE3 |
|  | 9.15 | 10 min | Unit overview | * Introduction to the unit * Handout of relevant materials | * Discussion | * Learner guide – pp xx - XY * Book of readings – Ref#1 * UAG | * PC3.5, AC3 |
|  | 9.25 | 15 | Introduction | * Jargon in the industry – common terms and their meaning * Introducing the FORG for this course | * All login to [www.xyz.com.au](http://www.xyz.com.au) * Review site | * Learner guide – pp xx-35 * FORG – Fictional Organisation a website that complements the learning. Full of characters and case studies and examples. |  |
|  |  |  |  |  |  |  |  |

# Session plan 2 - Heading

Before the session, check that you have:

* Done this task
* That task
* The other thing that you always forget about unless you look at this list for a prompt.

| Item | Start Time | Duration | Topic | Summary of main points | Activity | Resources required | Criteria addressed |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 1 |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |  |

Add sessions as required

Section 3

Session detail

An optional section to elaborate in greater detail the sequence of each session and delivery of the learning experience

# Session 1 - Welcome / Getting started

## Welcome

| Item | Action | Detail |
| --- | --- | --- |
| Total Time |  | 15 minutes |
| 1 | View | Eg; Show Slide 1: PPT Presentation X / Adobe Connect room, Page XX of Learner Guide, Moodle screen X |
| 2 | Discuss | Elaborate on the main points of discussion   1. Acknowledgement of Country 2. Housekeeping: Location of bathrooms, break times, emergency procedures |
| 3 | Activity | Complete the following activity:   1. *Icebreaker:* Here are the instructions for a cool icebreaker to conduct with a face-to-face group of 10 or more students. |

## Unit overview

| Item | Action | Detail |
| --- | --- | --- |
| Total Time |  | 15 minutes |
| 1 | View | Eg; Show Slide 1: PPT Presentation X / Adobe Connect room, Page XX of Learner Guide, Moodle screen X |
| 2 | Discuss | Elaborate on the main points of discussion   1. Introduction to the unit    * Explain outcome of unit/s    * Point of discussion    * Point of discussion 2. Handout of relevant materials 3. Emphasise assessment requirements |
| 3 | Activity | Complete the following activity:   1. Review UAG and conduct a Q and A |
| 4 | Check / Assess | Students to participate in a self check activity |

# Session X – Topic heading

## Lesson heading

| Item | Action | Detail |
| --- | --- | --- |
| Total Time |  | X minutes |
| 1 | View | Show: |
| 2 | Discuss |  |
| 3 | Activity |  |

# Tips

[Delete this section before you distribute your document.]

## Design and style tips

* Structure your content so it flows logically by using headings, paragraphs, bullet lists, etc.
  + Avoid skipping heading levels (e.g. going from H1 to H4)
* Group your content into meaningful, concise chunks of information
* Use plain English
* Use direct language (e.g. use personal pronouns: ‘I,’ ‘you,’ ‘we’)
* Use common, everyday words (e.g. ‘use’ rather than ‘utilise’; ‘begin’ rather than ‘commence’)
* Use culturally inclusive language and examples.   
  Avoid stereotypes and discriminatory or derogatory language
* Use inclusive, gender-neutral language (e.g. salesperson; flight attendant; firefighter; businessperson; chair; chairperson; etc.).
* Use technical terms only when necessary and provide a concise definition of each term.
* Avoid using jargon
* Write out an acronym the first time it’s used, e.g. Workplace Health and Safety (WHS).

## Accessibility

Before you distribute any document, you should ensure that you have done the following to better meet accessibility standards:

* Use Word Styles to format your text and structure your document
* Add appropriate alternative text for images
* Run the Word Accessibility checker.

**Tip**: Use [NCDAE’s cheatsheet](https://staff.tafensw.edu.au/section/tafe-digital/digital-teaching-support/develop/idol/accessibility/accessibility-resources/#checklists) to create more accessible Microsoft Word 2016 documents: .[pdf](http://ncdae.org/resources/cheatsheets/pdf/word2016.pdf) (525 KB)

### Use Word styles

Use the **Styles** panel to create uniform headings to format your text and structure your document. You can find the **Styles** panel on the Menu bar on the **Home** tab. Select your text and then choose the appropriate style:



Heading and text styles in this Word template include the following:

# Heading 1

## Heading 2

### Heading 3

#### Heading 4

##### Heading 5

Body text: Calibri 12pt is TAFE NSW primary system font and is required in Microsoft documents.

‘Quote’ style

**Note**: Do not skip heading levels (e.g. H1 followed by H4)

## Lists

Use the **Styles** panel to create a multilevel bullet list. You can find the **Styles** panel on the Menu bar on the **Home** tab. Select your **text** and then choose the **appropriate style:**



### Bulleted lists

An example of a multilevel bullet list follows:

* List
  + List
    - List
* List
* List
* List.

### Numbered lists

Use the **Paragraph** group on the **Menu** on the **Home** tab to create a multilevel numbered list. An example of a multilevel numbered list follows:



1. List
2. List
3. List
4. List
5. List.

Margin indentations for bullet and numbered lists in this Word template are following:

* Level 1: Left = 0.63 cm Hanging = 0.63 cm Line spacing = 6 pt
* Level 2: Left = 0.63 cm Hanging = 1.9 cm Line spacing = 6 pt
* Level 3: Left = 0.63 cm Hanging = 3.17 cm Line spacing = 6 pt

### Add alternative text (ALT text)

Add appropriate alternative text (ALT text) to all images, graphs and shapes:

1. Right-click on the image and select **Format** **Picture.**
2. Select the **Layout & Properties** icon and choose **Alt Text.**
3. Enter the appropriate Alt text in the **Description** **field** (NOT the Title field). Describe the content and function of the image.
4. If the image is only decorative and not essential (e.g. a pretty picture), leave the **Description** **field** blank.
5. If you have a complex image, diagram or graph, you might need to create a link to a separate document to create a long description.

### Run the Accessibility checker

Before you distribute a document, you should run Word’s Accessibility checker to identify any accessibility issues:

* Select File > Info > Check for Issues > Check Accessibility
* The accessibility checker will present accessibility errors, warnings, and tips to help you repair your document.
* Repair your document to correct any accessibility errors before you distribute it.

## Tables

### Best practice

* Use a simple table structure that makes sense when read from left to right.
* Make sure you have a header row that repeats if the table goes to the next page.



### What to avoid

Avoid using merged or nested cells which make it hard for screen reader users to follow the information in your table.

**Merged cells**



**Nested table:** A table within a table



## Page breaks

### Best practice

Use Page Break to create a new page. Go to the Menu bar; choose **Insert** > **Page** **Break.**



### What to avoid

Avoid using the enter key repeatedly to push your text onto the next page or create white space on a page:



## Hyperlinks

* Use meaningful link text that describes the destination of your link. You can use the long URL if the document is going to be printed out.

Example: [Make link text meaningful](https://www.w3.org/WAI/gettingstarted/tips/writing.html#make-link-text-meaningful) (long URL: https://www.w3.org/WAI/gettingstarted/tips/writing.html#make-link-text-meaningful)

* Avoid using phrases like ‘Click here’, ‘Read more’, ‘More information’, etc. as hyperlinks.

### Topic sections

You must create a cover page for each topic in the learner workbook using the following **Styles** and **Quick Part**.

Topic heading and text styles in this Word template include the following:

Section number

Section name

Use the **Quick Part Gallery** to insert the **Topic section image**.



Use the **Quick Part Gallery** to insert the **section image**.

1. You can find the **Quick Part Gallery** on the **Menu** bar on the **Insert** tab.
2. Place your cursor where you want to insert an **activity** from the **Quick Parts Gallery**.
3. Then click on the **section image** from the **Quick Part Gallery** drop down list.

## Provide image captions and attributions

### Captions

Captions should be placed under images. A caption should indicate the following:

* Title or description
* Image source
* Usage permissions
* Authorship.

It is also acceptable to provide a list at the end of the document which identifies the image and provides the attribution:

| Image | Attribution |
| --- | --- |
| *Image title/caption or brief description, and a reference to clearly identify the image* | *Include name of the creator/author and/or a link to where the image was sourced and licence type/link to licence (if licensed)* |

#### Example attributions table

| Image | Attribution |
| --- | --- |
| Cake decorating examples, page 10 | © TAFE NSW 2018 |
| Colourful world, page 15 | © iStock |
| Floral display, page 20 | Reproduced by TAFE NSW with the permission of Mary McGwire. |
| Nightfall over the bridge, page 25 | Created by Pablo Fernandez 2017. Available at [www.flickr.com](http://www.flickr.com). Reproduced under [Creative Commons NonCommercial-NoDerivs](https://creativecommons.org/licenses/by-nc-nd/3.0/au/) |
| Lightening at night, page 28 | Available at <https://pxhere.com/en/photo/656413>  Reproduced under [Creative Commons CC0](https://creativecommons.org/publicdomain/zero/1.0/). |

### Creative commons attributions

If you are using a Creative Commons image, please place all required information in the label. Learn more about Creative Commons attribution:

* [Copyright compliant labelling in learner resources](https://drive.google.com/file/d/1qBzr1ataKxeNjcM0vYgYv48OhqbNTKXf/view) (TAFE NSW)
* [Using a CC licence or licenced material](https://creativecommons.org.au/learn/howto/) (Creative Commons)
* [Applying a Creative Commons Licence](http://smartcopying.edu.au/open-education/creative-commons/applying-a-creative-commons-licence) (Smartcopying).

### Image sources

You can find copyright-free images on the following, but be sure to provide the appropriate CC licence information in your image caption:

* [Pixabay](https://pixabay.com/)
* [CC Search](https://ccsearch.creativecommons.org/)
* [ImageCodr.org](https://www.imagecodr.org/): Enter the [Flickr](https://www.flickr.com/creativecommons/) URL in [ImageCodr.org](https://www.imagecodr.org/) to generate a ready-to-use HTML code, including the licence summary.

## Follow Aboriginal and Torres Strait Islander Cultural Protocol

Unless already present, place the Acknowledgment of Country at the front of the document:

**TAFE NSW would like to pay our respect and acknowledge Aboriginal and Torres Strait Islander Peoples as the Traditional Custodians of the Land, Rivers and Sea. We acknowledge and pay our respect to the Elders, both past and present of all Nations.**

### Sourcing images or works identified as Aboriginal or Torres Strait Islander

Is the resource is authentic? Have you negotiated to use the work with the owner/s using appropriate protocol? If you cannot answer yes to these questions then you should not reproduce the work. Advice can be found at the Smartcopying website – [Indigenous cultural and intellectual property rights](https://www.smartcopying.edu.au/copyright-guidelines/hot-topics/indigenous-cultural-and-intellectual-property-rights).

When developing Aboriginal and Torres Strait islander identified content, using video, images or works you must include the following statement at the front of the workbook:

**WARNING: Aboriginal and Torres Strait Islander learners are warned that the following resource may contain images and voices of deceased persons.**

## References

### Footnotes and reference styles

Footnotes or end notes can be added automatically in Word:

* Place your cursor where you want your footnote or endnote reference to appear
* Choose **References**
* Choose **Insert** **Footnote** or **Insert** **Endnote.**



**Note**: The References tab also allows you to choose the style for your references (e.g. APA, Harvard, etc.).

### Learn more at Microsoft Word Office support:

* [Add footnotes and endnotes in Word](https://support.office.com/en-us/article/Add-footnotes-and-endnotes-in-Word-61f3fb1a-4717-414c-9a8f-015a5f3ff4cb)
* [Automatically format bibliographies in Word](https://support.office.com/en-us/article/APA-MLA-Chicago-%E2%80%93-automatically-format-bibliographies-405c207c-7070-42fa-91e7-eaf064b14dbb)