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| <b>Training Package</b> | Information and Communications Technology (ICA05)   |                               | <b>HSC Requirements and Advice</b>           |
| <b>Title</b>            | <b>Design organisational documents using computing packages</b>   |                               |  |
| <b>Unit code</b>        | <b>ICAD2012A</b>  | <b>Field</b><br>Documentation | <b>HSC Indicative Hours</b><br><br><b>20</b> |
| <b>Unit descriptor</b>  | <p>This unit defines the competency required to produce organisational documents using application software within organisational guidelines, procedures and policies.</p> <p>The following unit is a prerequisite for this competency:</p> <ul style="list-style-type: none"> <li>ICAU1128A Operate a personal computer.</li> </ul> <p>There may be benefit in concurrent learning of the following unit:</p> <ul style="list-style-type: none"> <li>ICAU2006A Operate computing packages.</li> </ul> <p>Related units of competency are:</p> <ul style="list-style-type: none"> <li>ICAD2003A Receive and process oral and written communication</li> <li>ICAU2006A Operate computing packages</li> <li>ICAU2013A Integrate commercial computing packages.</li> </ul> |                               |  |

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| <b>Evidence Guide</b>   |   |  | <b>HSC Requirements and Advice</b>   |
| The Evidence Guide provides advice on assessment and must be read in conjunction with the Performance Criteria, required skills and knowledge, the Range Statement and the assessment guidelines for this Training Package. |   |  |  |
| <b>Resources</b>  | <b>Critical aspects of evidence</b>   | <b>Assessment guidance</b>   | <b>Key Terms and Concepts</b>  |
| –   | <p>Competency must be demonstrated by building several workplace documents, without explicit instruction on their design from end-user or supervisor.</p> <p>A range of features of software applications are accessed and employed successfully to produce a workplace document.</p> | <p>The purpose of this unit is to define the standard of performance to be achieved in the workplace. In undertaking training and assessment activities related to this unit, consideration should be given to the implementation of appropriate diversity and accessibility practices in order to accommodate people who may have special needs. Additional guidance on these and related matters is provided in ICA05 Section 1.</p> <p>Competency in this unit should be assessed using summative assessment to ensure consistency of performance in a range of contexts. This unit can be assessed either in the workplace or in a simulated environment. However, simulated activities must closely reflect the workplace to enable full demonstration of competency.</p> <p>Assessment will usually include observation of real or simulated work processes and procedures and/or performance in a project context as well as questioning on underpinning knowledge and skills. The questioning of team members, supervisors, subordinates, peers and clients where appropriate may provide valuable input to the assessment process. The interdependence of units for assessment purposes may vary with the particular project or scenario.</p> <p>In the case of this unit, it could be assessed in a holistic manner with:</p> <ul style="list-style-type: none"> <li>ICAD2003A Receive and process oral and written communication</li> <li>ICAU2006A Operate computing packages</li> <li>ICAU2013A Integrate commercial computing packages.</li> </ul> | <ul style="list-style-type: none"> <li>access and retrieve data/documents</li> <li>appropriate person/s</li> <li>business specifications and conventions</li> <li>client/customer expectations</li> <li>client/customer approval</li> <li>commercial software applications</li> <li>company/organisation procedures</li> <li>company/organisation-specific software applications</li> <li>customer service</li> <li>decision making</li> <li>design and configure document templates</li> <li>design requirements</li> <li>document design</li> <li>document specifications and conventions</li> </ul> |

| Evidence Guide cont/d   |   | HSC Requirements and Advice  |
|---|---|--|
| Knowledge and skills  |   | Role context   |
| <p><b>Knowledge includes:</b></p> <ul style="list-style-type: none"> <li>• knowledge of organisational documentation and style guides</li> <li>• organisational storage and retrieval procedures</li> <li>• broad knowledge of features for application packages</li> <li>• general OH&amp;S regulations</li> <li>• current business practices in relation to preparing reports</li> <li>• use of input/output devices (e.g. scanners, laser printers)</li> <li>• organisational procedures for document design.</li> </ul> | <p><b>Skills include:</b></p> <ul style="list-style-type: none"> <li>• basic decision making skills</li> <li>• general customer service skills in relation to internal customers</li> <li>• questioning and active listening</li> <li>• problem solving skills for basic application troubleshooting</li> <li>• literacy and numeracy skills in regard to general workplace documentation design, usage and improvement.</li> </ul> | <p>Organisational documents allow an organisation to generate and capture important data in a meaningful format. Determining the requirements and a template for the documents enables an organisation to maintain consistency across different levels and departments.</p> <p>The breadth, depth and complexity of knowledge and skills in this competency would prepare a person to perform in a range of varied activities or knowledge applications where there is a clearly defined range of contexts in which the choice of actions required is usually clear. There would generally be limited complexity in the range of operations to be applied.</p> <p>Performance of a prescribed range of functions involving known routines and procedures and some accountability for the quality of outcomes would be characteristic.</p> <p>Applications may include some complex or non-routine activities involving individual responsibility or autonomy and/or collaboration with others as part of a group or team.</p> <p>An individual demonstrating this competency would be able to:</p> <ul style="list-style-type: none"> <li>• demonstrate basic operational knowledge in a moderate range of areas</li> <li>• apply a defined range of skills</li> <li>• apply known solutions to a limited range of predictable problems</li> <li>• perform a range of tasks where choice between a limited range of options is required</li> <li>• assess and record information from varied sources</li> <li>• take limited responsibility for own outputs in work and learning.</li> </ul> |
|   |   | <ul style="list-style-type: none"> <li>• edit documents</li> <li>• exit applications</li> <li>• features, benefits and limitations of templates and wizards</li> <li>• features, benefits, limitations and use of application software packages</li> <li>• input/output devices</li> <li>• internal and external clients/customers</li> <li>• manipulate documents</li> <li>• occupational health and safety (OHS)</li> <li>• organisational document/s</li> <li>• organisational needs</li> <li>• preparing business reports</li> <li>• print organisational documents</li> <li>• problem solving</li> <li>• save, store, find and use files</li> <li>• selecting appropriate software</li> <li>• store documents</li> <li>• style guides</li> <li>• template</li> <li>• toolbars</li> <li>• wizard</li> <li>• working knowledge of application software packages</li> <li>• working knowledge of templates and wizards.</li> </ul>   |

## KEY COMPETENCIES

The seven Key Competencies represent generic skills considered necessary for effective participation by an individual in the workplace.

Performance Level 1 – at this level, the candidate is required to undertake tasks effectively

Performance Level 2 – at this level, the candidate is required to manage tasks

Performance Level 3 – at this level, the candidate is required to use concepts for evaluating and reshaping tasks

The following Key Competency levels have been considered within the structure of this unit's Performance Criteria.

|                         |   |   |   |
|-------------------------|---|---|---|
| <b>Key competencies</b> | 1 | Collect, analyse and organise information | 1 |
|                         | 2 | Communicate ideas and information         | 2 |
|                         | 3 | Plan and organise activities              | 1 |
|                         | 4 | Work with others and in teams             | 2 |
|                         | 5 | Use mathematical ideas and techniques     | 1 |
|                         | 6 | Solve problems                            | 2 |
|                         | 7 | Use technology                            | 1 |

| Elements  | Performance criteria   | Range Statement  | HSC Requirements and Advice   |
|---|--|--|---|
| 1 Design documents to meet organisational needs | 1.1 Use <i>applications</i> to design and configure document templates for use in a business environment | <p>The Range Statement contextualises the unit of competency and provides a focus for assessment. The information provided is intended to define the scope of assessment and to assist assessors define the performance to be achieved by an individual in the workplace. The Range Statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. <i>Italicised</i> wording in the Performance Criteria is detailed as follows.</p> <p>[Variables are in <b>bold</b>, followed by the Scope in dot points.]</p> <p><b>Applications</b></p> <ul style="list-style-type: none"> <li>• May include database programs, word processors, email programs, internet browsers, system browsers, image programs, presentation programs and spreadsheets.</li> </ul> | <p><b>Learning experiences for the HSC must address:</b></p> <p>A basic knowledge and application of:</p> <ul style="list-style-type: none"> <li>• occupational health and safety (OHS) procedures related to the work environment and tasks</li> <li>• basic ergonomic solutions relating to products and people/production interaction to reduce potential harm to a user when performing computer-related tasks.</li> </ul> <p>Types of clients/customers including:</p> <ul style="list-style-type: none"> <li>• internal <ul style="list-style-type: none"> <li>- workmates/colleagues/employees</li> <li>- departments</li> </ul> </li> <li>• external.</li> </ul> <p>An understanding of the differing needs of internal and external clients/customers.</p> <p>Establishing good customer service including:</p> <ul style="list-style-type: none"> <li>• knowledge of company/organisation product/service policies</li> <li>• use language that is targeted to the specific client/customer</li> <li>• present a friendly and courteous manner</li> <li>• use positive gestures and body language</li> <li>• ensure prompt response to enquiry/request</li> <li>• adopt a solutions-oriented approach</li> <li>• follow-up to maximise customer satisfaction.</li> </ul> <p>Types of company/organisation documents including:</p> <ul style="list-style-type: none"> <li>• paper-based</li> <li>• online/electronic</li> <li>• internal (for in-house use, used by the same company/organisation that develops it)</li> <li>• external (for outside use, for users outside the company/organisation that develops it).</li> </ul> <p>An awareness of the difference in design elements and requirements between paper-based and online/electronic documents.</p> |

| Elements | Performance criteria                                    | Range Statement | HSC Requirements and Advice   |
|----------|---|-----------------|---|
|          |   |                 | <p>Accessing a range of organisational documents created for different purposes to:</p> <ul style="list-style-type: none"> <li>• identify positive and negative aspects of the design</li> <li>• analyse and evaluate their development and effectiveness.</li> </ul> <p>Identifying the needs of the client/customer/target audience and analysing their needs in order to:</p> <ul style="list-style-type: none"> <li>• determine document requirements</li> <li>• produce effective documents.</li> </ul> <p>Using questioning techniques and active/reflective listening to:</p> <ul style="list-style-type: none"> <li>• identify <ul style="list-style-type: none"> <li>- client/customer need/s</li> <li>- target audience</li> </ul> </li> <li>• confirm the main purpose of the document.</li> </ul> <p>An understanding of the function and features of templates including:</p> <ul style="list-style-type: none"> <li>• helps to establish and maintain standards</li> <li>• outline the structure and format of the document</li> <li>• ensure standard text, diagrams and styles</li> <li>• allow more than one person to work on the document and maintain same structure.</li> </ul> <p>General features, benefits, limitations and working knowledge of:</p> <ul style="list-style-type: none"> <li>• templates (including editing an existing template and creating templates)</li> <li>• wizards.</li> </ul> |
|          | 1.2 Demonstrate the implementation of design guidelines |                 | <p><b>Learning experiences for the HSC must address:</b></p> <p>A basic knowledge of:</p> <ul style="list-style-type: none"> <li>• business specifications and conventions</li> <li>• document specifications and conventions</li> <li>• principles of document design <ul style="list-style-type: none"> <li>- layout</li> <li>- graphics</li> <li>- colour schemes</li> <li>- font.</li> </ul> </li> </ul>  |

| Elements | Performance criteria                   | Range Statement  | HSC Requirements and Advice  |
|----------|--|--|--|
|          |  |  | <p>Types of style guides including:</p> <ul style="list-style-type: none"> <li>• generic</li> <li>• corporate</li> <li>• project-specific.</li> </ul> <p>An awareness of the information provided in a style guide including:</p> <ul style="list-style-type: none"> <li>• font styles and form</li> <li>• appropriate terminology</li> <li>• acceptable spelling, abbreviations and acronyms</li> <li>• preferred document and page layout</li> <li>• use of punctuation, numbers, bullets and symbols</li> <li>• company/organisation and product names and logos usage</li> <li>• referencing standards</li> <li>• problem words</li> <li>• use and appearance of graphics, captions, figures and tables.</li> </ul> <p>An awareness of:</p> <ul style="list-style-type: none"> <li>• the benefits of style guides</li> <li>• possible results if style guides are not used</li> <li>• the importance of knowing when to vary from a style guide.</li> </ul> <p>Use of style guide/s to create documents to specification.</p> <p>Company/organisational procedures for document design.</p> <p>Current business practice in relation to preparing reports.</p> |
|          | 1.3 Select appropriate <i>software</i> | <p><b>Software</b></p> <ul style="list-style-type: none"> <li>• May include but is not limited to commercial software applications; organisation-specific software, word processing packages, spreadsheet applications, databases, graphics packages, communication packages and presentation applications.</li> </ul> | <p><b>Learning experiences for the HSC must address:</b></p> <p>An awareness of the differences between:</p> <ul style="list-style-type: none"> <li>• commercial software applications</li> <li>• company/organisation-specific software.</li> </ul> <p>A range of application software packages including:</p> <ul style="list-style-type: none"> <li>• word processing</li> <li>• spreadsheet</li> </ul>   |

| Elements | Performance criteria   | Range Statement | HSC Requirements and Advice  |
|----------|--|-----------------|--|
|          |  |                 | <ul style="list-style-type: none"> <li>• presentation</li> <li>• communication</li> <li>• database</li> <li>• graphics.</li> </ul> <p>A broad knowledge of the following in relation to a range of application software packages:</p> <ul style="list-style-type: none"> <li>• features</li> <li>• benefits</li> <li>• limitations</li> <li>• application/use.</li> </ul> <p>Points to consider when selecting appropriate software including:</p> <ul style="list-style-type: none"> <li>• client/customer needs</li> <li>• user ability</li> <li>• appropriateness to the task</li> <li>• budget</li> <li>• time constraints</li> <li>• availability of hardware and other supporting resources</li> <li>• licensing requirements.</li> </ul> <p>Basic decision making skills.</p> |
|          | <p>1.4 Use <i>software</i> as per specifications to design documents</p> |                 | <p><b>Learning experiences for the HSC must address:</b></p> <p>Working knowledge of a range of application software packages to enable skills to create, work with and modify:</p> <ul style="list-style-type: none"> <li>• text documents</li> <li>• spreadsheets</li> <li>• presentation/multimedia files</li> <li>• electronic mail</li> <li>• databases</li> <li>• graphic images.</li> </ul> <p>Using selected software applications appropriate to design requirements and client's expectations in order to produce a range of organisational documents including:</p> <ul style="list-style-type: none"> <li>• memorandum</li> <li>• report</li> </ul>  |

| Elements | Performance criteria  | Range Statement   | HSC Requirements and Advice   |
|----------|---|---|---|
|          |   |   | <ul style="list-style-type: none"> <li>• electronic mail</li> <li>• facsimile</li> <li>• newsletter</li> <li>• business letter</li> <li>• client database</li> <li>• workplace form.</li> </ul> <p>Use of a range of input/output devices as required including:</p> <ul style="list-style-type: none"> <li>• a scanner</li> <li>• a printer</li> <li>• a digital camera</li> <li>• storage devices.</li> </ul>   |
|          | 1.5 Store documents for access and editing as required                    |   | <p><b>Learning experiences for the HSC must address:</b></p> <p>Company/organisation storage and retrieval procedures.</p>  |
|          | 1.6 Obtain approval of design of documents from <i>appropriate person</i> | <p><b>Appropriate person</b></p> <ul style="list-style-type: none"> <li>• May include a supervisor, teacher, authorised business representative or client.</li> </ul> | <p><b>Learning experiences for the HSC must address:</b></p> <p>A knowledge of company/organisation practices for client/customer approval and sign-off.</p> <p>Appropriate persons including:</p> <ul style="list-style-type: none"> <li>• company/organisation person/s <ul style="list-style-type: none"> <li>- team leader/supervisor</li> <li>- editor</li> <li>- technical expert</li> <li>- trainer</li> <li>- experienced colleague</li> </ul> </li> <li>• client/customer.</li> </ul> <p>An awareness of the importance of client review throughout the development process to:</p> <ul style="list-style-type: none"> <li>• ensure specifications have been met</li> <li>• minimise the need for reworking the document.</li> </ul> <p>Points to be reviewed:</p> <ul style="list-style-type: none"> <li>• style</li> <li>• design</li> <li>• accessibility</li> <li>• structure</li> </ul> |

| Elements                                     | Performance criteria                         | Range Statement   | HSC Requirements and Advice   |
|--|--|---|---|
|  |  |   | <ul style="list-style-type: none"> <li>• consistency</li> <li>• content <ul style="list-style-type: none"> <li>- clarity/readability</li> <li>- plain English</li> <li>- explanation of technical terms/jargon</li> <li>- accuracy</li> <li>- spelling, grammar and punctuation</li> </ul> </li> <li>• usability</li> <li>• completeness.</li> </ul>  |
| 2 Access, retrieve, manipulate and save data | 2.1 Use <i>software</i> as per specification | <b>Software</b> <ul style="list-style-type: none"> <li>• May include but is not limited to commercial software applications; organisation-specific software, word processing packages, spreadsheet applications, databases, graphics packages, communication packages and presentation applications.</li> </ul> | <b>Learning experiences for the HSC must address:</b><br>Use of toolbars as appropriate to application software package selected including: <ul style="list-style-type: none"> <li>• standard</li> <li>• formatting</li> <li>• drawing</li> <li>• tables and borders.</li> </ul> Editing common to a range of software applications including: <ul style="list-style-type: none"> <li>• apply basic text formatting <ul style="list-style-type: none"> <li>- font</li> <li>- size</li> <li>- colour</li> <li>- attributes (bold, italics and underline)</li> </ul> </li> <li>• cut, copy, paste and paste special</li> <li>• use format painter</li> <li>• change margins and page breaks</li> <li>• create and adjust headers and footers</li> <li>• use bullets and numbering</li> <li>• insert tabs and indents</li> <li>• use spellcheck, thesaurus and find/replace</li> <li>• insert footnotes and endnotes</li> <li>• insert graphics</li> <li>• align, indent and space text, paragraphs and graphics</li> <li>• create tables and format columns, rows and cells</li> <li>• create multiple columns of text</li> <li>• insert and format text, numbers and formulae in cells</li> <li>• sort information</li> <li>• use basic mathematical operations</li> </ul> |

| Elements | Performance criteria                        | Range Statement   | HSC Requirements and Advice  |
|----------|---|---|--|
|          |   |   | <ul style="list-style-type: none"> <li>• create charts and graphs</li> <li>• apply borders</li> <li>• use colour and shading</li> <li>• use keyboard shortcuts.</li> </ul> <p>Problem solving skills for basic application troubleshooting.</p>  |
|          | 2.2 Locate and open <i>files</i>            | <p><b>Files</b></p> <ul style="list-style-type: none"> <li>• May include but is not limited to HTML pages, pdf files, word files, spreadsheet files, database files, pictures, and email messages.</li> </ul> | <p><b>Learning experiences for the HSC must address:</b></p> <p>Knowledge of how to save, store, find and use files effectively including:</p> <ul style="list-style-type: none"> <li>• navigating around the hard disk</li> <li>• viewing files</li> <li>• implementing file management/system</li> <li>• identifying different kinds of files</li> <li>• using the system browser</li> <li>• opening and saving documents</li> <li>• file naming conventions</li> <li>• making new folders, subfolders and shortcuts</li> <li>• copying files to storage devices</li> <li>• renaming folders and files</li> <li>• changing file type</li> <li>• moving files</li> <li>• finding misplaced documents</li> <li>• deleting unwanted files</li> <li>• managing the recycle bin</li> <li>• viewing and applying various file properties</li> <li>• backing up files for security</li> <li>• version control.</li> </ul> |
|          | 2.3 Amend designs according to requirements |   | <p><b>Learning experiences for the HSC must address:</b></p> <p>An awareness of the importance of information and communications technology (ICT) staff and the client agreeing on what is to be done in regards to the document.</p> <p>A knowledge of company/organisation practices for:</p> <ul style="list-style-type: none"> <li>• identifying document status <ul style="list-style-type: none"> <li>- draft</li> <li>- pre-publication</li> <li>- confidential</li> </ul> </li> </ul>  |

| Elements | Performance criteria  | Range Statement   | HSC Requirements and Advice  |
|----------|---|---|--|
|          |   |   | <ul style="list-style-type: none"> <li>• tracking processes</li> <li>• version control.</li> </ul> <p>Printing of organisational documents including:</p> <ul style="list-style-type: none"> <li>• checking documents before printing <ul style="list-style-type: none"> <li>- print preview</li> </ul> </li> <li>• choosing print options <ul style="list-style-type: none"> <li>- page set-up</li> <li>- print area</li> <li>- print quality</li> <li>- select printer</li> <li>- paper source</li> <li>- print selection/range of pages.</li> </ul> </li> </ul> <p>A knowledge of company/organisation practices for:</p> <ul style="list-style-type: none"> <li>• final approval and sign-off</li> <li>• release of document</li> <li>• maintenance/review of document.</li> </ul> |
|          | 2.4 Exit <i>applications</i> successfully without loss of <i>data</i> | <p><b>Applications</b></p> <ul style="list-style-type: none"> <li>• May include database programs, word processors, email programs, internet browsers, system browsers, image programs, presentation programs and spreadsheets.</li> </ul> <p><b>Data</b></p> <ul style="list-style-type: none"> <li>• May include text or graphics added to the document.</li> </ul> |  |