

Title	Customise software features and create document templates for generic text and information management		
Level	3	Credits	6

Purpose	<p>This unit standard is intended for people who input and manipulate information using software applications to create documents which communicate efficiently and effectively and have visual appeal.</p> <p>People credited with this unit standard are, for generic text and information management, able to: apply customising features of software to enhance documents from provided data and by direct composition; and create a document template for a specific purpose.</p>
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Classification	Business Administration > Text and Information Management - Generic
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Available grade	Achieved
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Guidance Information

- 1 Customising software features in this standard must be applied in accordance with standard operating features of the software program being used by the candidate.
- 2 All activities associated with this unit standard must comply with *Guidelines for using computers: Preventing and managing discomfort, pain and injury*, (Wellington: Accident Compensation Corporation, Department of Labour, 2010), available at <http://www.business.govt.nz/worksafe/information-guidance/all-guidance-items/guidelines-for-using-computers/computers.pdf>.
- 3 **Definitions**

Customise for the purposes of this unit standard means to make changes to auto features for a specific purpose, such as removing the full stop from the numbering function or increasing the distance between the bullet and text.

Direct composition refers to text created in candidates own words without prior preparation and entered directly on the keyboard.

Fit for purpose means the information is accurate and relevant to the intended audience, and the document is free from text errors.

Intended audience is the individual or group who will receive the information, therefore the amount and nature of the information and the level of the language must be appropriate to this audience. The intended audience will be specified for each document.

Provided data refers to but is not limited to – a scenario and/or annotated notes and/or retrieved text.

- 4 Recommended skills and knowledge for entry:
Unit 12883, *Enter and manage text for generic text and information management*, or demonstrate equivalent knowledge and skills.

Outcomes and performance criteria

Outcome 1

Apply customising features of software to enhance documents from provided data and by direct composition.

Range types of documents may include but are not limited to – reports, newspaper article, newsletter, flyer, tables, questionnaire, programme;
the following customising features must be demonstrated at least once over the three documents collectively - multi-level bullets and numbering; table features; columns; default settings; dictionary additions; glossary and/or autotext entry;
evidence of three different types of documents is required.

Performance criteria

1.1 Text in documents is fit for purpose and the intended audience.

1.2 Multi-level bullets and numbering are customised and used to enhance a document.

1.3 Table features are customised and used to enhance a document.

Range table features may include but are not limited to – cell height, column width, gridlines, borders, alignment, merging and splitting cells, spacing before and after text, tabs, formulae, sorting, shading;
evidence of five table features is required.

1.4 Columns are customised and used to enhance a document.

Range column customisation may include but is not limited to – space between columns, column break, enhanced first letter, justification, banner headline, newspaper-style paragraphs;
evidence of four column customisations is required.

1.5 Default settings are changed and used to enhance a document.

Range default settings may include but are not limited to – margins, first line indents, page orientation, paragraph formats, printer.

1.6 Auto page numbering feature is used on a multi-page document.

1.7 A glossary and/or autotext entry is created, stored, and inserted in a document.

1.8 Entries are added to the software dictionary.

Outcome 2

Create a document template for a specific purpose.

Range document template must include but is not limited to the use of – auto text, macro file(s), merge fields.

Performance criteria

2.1 A document template for a specific purpose is created and saved.

Range specific purpose of the document template may include but is not limited to – fax sheet, order form, weekly budget, letterhead, memorandum.

Replacement information	This unit standard, unit standard 108 and unit standard 12887 were replaced by unit standard 32003.
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This unit standard is expiring. Assessment against the standard must take place by the last date for assessment set out below.

Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	22 December 1997	31 December 2012
Revision	2	16 January 2001	31 December 2012
Revision	3	13 November 2002	31 December 2012
Revision	4	19 September 2005	31 December 2012
Review	5	22 October 2010	31 December 2012
Revision	6	15 September 2011	31 December 2017
Rollover and Revision	7	16 April 2015	31 December 2022
Review	8	27 February 2020	31 December 2022

Consent and Moderation Requirements (CMR) reference	0113
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This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.