Title	Create and customise business documents		
Level	3	Credits	6

Purpose	This unit standard is intended for people who input text and manipulate information using software applications to create documents.
	People credited with this unit standard are able to: create and customise business documents from hard copy and by direct composition, to meet the intended purpose and organisational style requirements; and apply mail merge options to produce business documents that are fit for purpose and for the intended audience.

Classification	Business Administration > Business Information Processing

Available grade	Achieved

Guidance Information

1   Recommended skills and knowledge for entry
Unit 32002, *Compose and enter text to create and manage business documents*, or demonstrate equivalent knowledge, skills and experience.

2   Content for some business documents may be provided to the learner in annotated hard copy. It is expected that the learner will input and format the text, not that it be supplied in electronic version such as .txt file.

3   Learners must be given the opportunity to proofread their work prior to submission.

4   Definitions
Business documents refer to documents such as correspondence, meeting documents, formal report, form or online form, marketing materials, newsletter, travel documents.
Customising refers to formatting text appearance as well as page appearance. Customising from annotated notes and/or drafts must involve extensive amendments to an existing document.
Design layout refers to the positioning and arrangement of various elements in a document and considers contrast, repetition, alignment, proximity, harmony, balance and proportion.
Direct composition refers to original text created in learner's own words.
Ethical and legal considerations related to managing and sharing files refer to copyright, privacy, file security, appropriateness of the material in its context.

Intermediate level word processing skills refer to:
- o formatting text and documents: page numbering options; page and section breaks; page layout; header and footer features; text format and manipulation/appearance; alignment; columns; hyphenation; multilevel bullets and numbering; styles;
- o enhancements: boxes, borders, text boxes, charts, design and layout;
- o tables*:* design, layout, formatting such as multiple line headings, column widths and style;
- o mail merge*:* linking address blocks, fields, or other information from a database or spreadsheet;
- o other tools*:* use of drawing tools; use of reviewing tools; templates; setting language; find/replace; embedding charts or graphs; referencing features (footnotes, endnotes, captions, table of contents, index, cross-referencing); customising dictionary; customising interface; customising keyboard for macrons;
- o accurately keying in text at approximately 35 words per minute (wpm).

This list is not exhaustive, and assessors will need to determine the level of other intermediate word processing skills if required.

Fit for purpose means the information is accurate and relevant to the intended audience. Documents must be error free, use appropriate vocabulary and tone, and comply with organisational requirements.

Good practice in this context includes selecting and using the appropriate feature or function to enable correct use of formatting, enhancements, tables and other tools to create documents using text processing and design layout skills.

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.

Shared refers to offering access to digital information or resources for collaboration, reviewing, downloading, *a*nd/or modification.

Specified timeframe will be a period of time that would be acceptable in a workplace situation, and will vary depending on the task and output required.

5   All activities associated with this unit standard must comply with health and safety guidelines and recommendations in relation to the working environment and work practices. Reference for this unit standard includes *ACC5637 Guidelines for Using Computers - Preventing and managing discomfort, pain and injury*. Accident Compensation Corporation - Department of Labour, Te Tari Mahi 2010; available from WorkSafe New Zealand, at https://worksafe.govt.nz/topic-and-industry/work-related-health/ergonomics/safely-using-computers-at-work/.

6   Legislation relevant to this unit standard includes but is not limited to the:
Copyright Act 1994
Harmful Digital Communications Act 2015
Health and Safety at Work Act 2015
Privacy Act 2020
and any subsequent amendments.
Current legislation and regulations can be accessed at http://legislation.govt.nz/.

Outcomes and performance criteria

Outcome 1

Create and customise business documents from hard copy and by direct composition, to meet the intended purpose and organisational style requirements.

Range   evidence of at least six different types of business documents;
            evidence of direct composition in at least three of the documents;
            customising features must be demonstrated at least twice over the six documents collectively;
            customising must include – design layout, multi-level bullets and numbering; table features; columns including hyphenation; default settings; dictionary additions; glossary and/or auto-text entry; fields including fill-in fields; sorting options.

Performance criteria

1.1   Text is entered and customised using good practice and intermediate level word processing skills.

1.2   Business documents are composed and customised from annotated notes, in accordance with information provided and output required, using good practice and intermediate level word processing skills.

1.3   Images and text are integrated and correctly formatted to support the intent of the business documents and the principles of design layout.

          Range   may include but is not limited to – refining texts and images, formatting images, sizing, insert, grouping.

1.4   Business documents are processed and presented within a specified timeframe in accordance with information provided and output required.

1.5   Business documents are produced, stored, shared and/or printed and are fit for purpose and in accordance with ethical and legal considerations.

Outcome 2

Apply mail merge options to produce business documents that are fit for purpose and for the intended audience.

Performance criteria

2.1   A merge is created using at least five data fields for five database records, to insert variable information in a document.

          Range   includes – a form letter with merge fields in the body of the letter; includes one of – email, customised labels, envelopes.

Replacement information	This unit standard replaced unit standard 108, unit standard 12886, and unit standard 12887.

Planned review date	31 December 2026

Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	27 February 2020	N/A
Rollover and Revision	2	29 August 2024	N/A

Consent and Moderation Requirements (CMR) reference	0113

This CMR can be accessed at http://www.nzqa.govt.nz/framework/search/index.do.

Comments on this unit standard

Please contact Ringa Hora Services Workforce Development Council qualifications@ringahora.nz if you wish to suggest changes to the content of this unit standard.