

Unit Title: Use digital technologies to create documents

OCR unit number: 3
 Level: Level 1
 Guided learning hours: 10
 Unit reference number: Y/507/2759

Unit aim and purpose

When preparing for employment you should be able to use digital devices such as PCs, laptops, tablets etc, to develop text documents. You will be able to combine information from a variety of sources, as well as use software features to produce routine documents used in the workplace. This unit will help you to prepare for employment in a job that requires the production of standard documents such as letters, invoices and completing forms.

You will show that you can work with, edit, amend and format documents following instructions provided. You will be able to create documents as well as use prepared company templates. You will be able to prepare document layout for printing by checking that they are correct, setting margins, using headers and footers to display information and use printers as instructed.

Learning Outcomes The Learner will:	Assessment Criteria The Learner can:	Teaching Content
1. Be able to manage documents to complete routine tasks	1.1 work with files 1.2 use a document template 1.3 prepare document layout for printing	<ul style="list-style-type: none"> • Work with files: <ul style="list-style-type: none"> - create, open <u>generic, non-generic files e.g. spreadsheet file</u> - close, save, save as <u>with correct file format</u>; • Use a document template: <ul style="list-style-type: none"> - e.g. letter, poster, notice, information sheet, <u>invoice, forms</u> • Prepare document layout for printing: <ul style="list-style-type: none"> - page orientation e.g. portrait, landscape - <u>set margins e.g. top, bottom, left and right</u> - <u>set</u> and display headers and footers - <u>automatic fields e.g. date, file name, page numbers, page number formats</u> - paper sizes e.g. A4, A5 - print preview - load paper in printer - print, screen shot, <u>print queues</u>

Learning Outcomes The Learner will:	Assessment Criteria The Learner can:	Teaching Content
2. Be able to enter given information into documents	2.1 enter given information 2.2 create a table 2.3 combine information from a different source	<ul style="list-style-type: none"> • Enter given information: <ul style="list-style-type: none"> - text, numbers, special characters (eg @, /, -), <u>symbols (eg wingdings)</u> • <u>Create a table:</u> <ul style="list-style-type: none"> - <u>table layout; rows and columns, select table, columns/rows, narrow/widen columns/rows</u> • <u>Combine information from a different source:</u> <ul style="list-style-type: none"> - picture, photograph, logo, clipart, shape, <u>text, chart/graph</u>
3. Be able to follow instructions to edit documents	3.1 amend given information 3.2 use software features to check for accuracy	<ul style="list-style-type: none"> • Amend given information: <ul style="list-style-type: none"> - delete, move, <u>copy</u> - text selection e.g. character, word, sentence, paragraph, document - <u>replace text e.g. search and replace, find, match case, whole words</u> • Use software features to check for accuracy <ul style="list-style-type: none"> - <u>spellcheck, grammar check/proof reading</u> - <u>spellcheck settings e.g. UK spelling format</u> - correcting errors
4. Be able to present documents to complete routine tasks	4.1 format given information	<ul style="list-style-type: none"> • Format given <u>information:</u> <ul style="list-style-type: none"> - set and amend font, size, <u>colour</u> - alignment e.g. left, right, justify, centre - <u>indent text e.g. left and right, first line indent</u> - <u>line spacing e.g. single, 1.5, double</u> - <u>predefined styles e.g. Normal, Heading 1 etc</u> - emphasis e.g. bold, underline, <u>double underline italics</u> - <u>format lists e.g. bullets, numbers</u> - <u>borders, gridlines and shading</u>

Learning Outcomes The Learner will:	Assessment Criteria The Learner can:	Teaching Content
	4.2 set out combined information	<ul style="list-style-type: none"> • Set out combined information: <ul style="list-style-type: none"> - move - wrap text e.g. square, tight, top and bottom - <u>position objects precisely e.g. within margins and not overlapping</u> - maintain document layout - ensure consistent spacing between paragraphs and document sections

Delivery guidance

You could deliver the teaching for Entry Level 3 and Level 1 units at the same time. To help you we have underlined text in the Level 1 unit to identify the increased breadth and depth of teaching.

Be able to manage documents to complete routine tasks

Learners should be familiar with different file formats such as word processing, spreadsheets and image files and have the confidence to open and use files from different software to complete tasks. Learners should understand the purpose of different documents such as letters, invoices, interactive forms etc and recognise the way they are structured. They should understand that companies have procedures and systems for managing folders and files which should be followed when completing routine tasks. Files and folders should be named as instructed following guidelines given.

Learners should be able to change the layout of business documents by setting page margins as well as understand the purpose of automatic fields in headers and footers to display file version numbers, date stamping and page numbering. Learners should recognise different paper sizes e.g. A4, A5, A3 and the paper size specific to available printers. Different types of printers could be discussed with their capabilities and purpose and how documents should be prepared for hard copy, email, photocopying etc. The methods of checking documents before printing such as spelling and grammar check, proof reading and use of print preview should be explored to ensure that documents are accurate and laid out as instructed. Learners should be able to send documents to installed printers and take screen shots to demonstrate how they would print. When devices such as tablets are used candidates should ensure that documents are of standard format when uploaded.

Be able to enter given information into documents

Learners should be able to enter text and numerical information into routine documents. They should also be able to use special characters and symbols and use these when completing documents and interactive forms. Learners should be able to create tables to display information clearly. They should know how to alter column width to ensure information is presented clearly and as instructed. Learners should know how to combine information from another file into a document such as an image or blocks of text. They should be taught how to include a chart from a spreadsheet file into a text document to enhance presentation of information.

Be able to follow instructions to edit documents

Learners should be able to amend, edit and manipulate documents as instructed. They should know the difference between moving information and copying information. They should use the software to copy information from one document to another or within the same document. They should be taught to how to align text in a document. They should be able to fully justify a document and be aware of the effect this has on text spacing. Learners should be taught how to alter line spacing such as single to double using software tools and how to indent text and paragraphs e.g. first line indent, left indent or left and right indent. They should be able to use the search and replace facility whilst understanding the advantages of using this over manual methods. They should be able to find and replace whole words only so as not to make unrequested changes e.g. 'band' to 'group' but not 'disband' to 'disgroup'. They should also be aware of matching case when replacing words. They should be able to use tools available in the software to check spelling and grammar but aware of the limitations of spelling and grammar checkers. They should be taught that UK spelling should be used e.g. colour and not color; rumour and not rumor; recognise and not recognize. They should also be aware of UK date formats e.g. day, month, year and not month, day, year. They should enter accurate information e.g. correct names, dates and times and be able to proof read keyed in text against instructions before preparing to print. The learner should correct any errors identified. The importance of accurate and clear information communicated in the workplace as well as to external clients and customers should be emphasised.

Be able to present documents to complete routine tasks

Learners should be able to format documents and understand the importance of consistency across all information. They should be aware that companies are recognised by their logos and styles and the importance of these. They should recognise different document layouts e.g. letters, posters, information sheets, invoices and online forms and understand that their purpose affects formatting and editing. They should be taught to use basic styles and amend font styles. Learners will know how to emphasise text to enhance information and be able to apply bullets or numbers to lists to give clarity. They should understand that appropriate formatting improves a document's appearance but also realise that over emphasis detracts from the information to be conveyed. Learners will be able to structure documents and follow instructions to introduce tables, images and charts into routine documents. They should be able to apply borders, gridlines and shading to tables, charts and images. They should be taught the conventions of document layout e.g. formal letters, invoices, forms. They should check and correct when information positioning is altered e.g. line spacing deleted between paragraphs and sections of documents, spacing between sentences etc.

Learners should understand that the positioning of information is important to the presentation of the document and ensure that images do not overlap text and are placed in the correct position; table columns are widened correctly so as not to split words; charts are legible and objects do not extend into margins.