



Text Processing (Business Professional)

Unit Title:	Document Presentation
OCR unit number:	06978
Level:	2
Credit value:	5
Guided learning hours:	50
Unit reference number:	J/505/7092

Unit aim

This unit aims to equip candidates with the ability to produce, from handwritten draft and recalled text, using a word processor, a variety of specialist business documents to a standard that meets the requirements of employment. Candidates will use a range of complex word processing functions and to work accurately within time constraints.

Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	Knowledge, understanding and skills
1 Be able to use a word processor	1.1 Select and use functions of a word processor, including <ul style="list-style-type: none"> - open files - save files - setting and adjusting margins - line spacing - alignment, including left, right centre and full justification - insert shaded/unshaded text boxes - insert and position pictures - edit word art in recalled text - use font styles/sizes - cut and paste word art - case change of recalled text - ways of emphasising text - indent text - headers/footers - find and replace text - page numbering - insert full-page borders - create and insert organisation charts - make changes to organisation charts by adding text and boxes 	<ul style="list-style-type: none"> • Retrieve pre-stored documents or templates • Set margins of at least 13 mm • Adjust top and left margins • Insert a shaded or unshaded text box, with border • Use a different font style • Insert a full-page fancy border • Centre one or more lines of text • Change line spacing to double/single • Left and right alignment • Change text to full justification • Case change of recalled text from lower to upper case or from upper to lower case • Emphasise a section of text, using bold, italics, underlining, change of font style/size • Inset text from left margin • Edit word art by changing the words and font size • Move word art to another position • Insert a picture, e.g. clip art, in a specified position • Insert a header or footer • Insert page numbers on continuation sheets in any position and in any style

Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	Knowledge, understanding and skills
	<ul style="list-style-type: none"> - insert superscript and subscript characters - insert special characters and symbols - create a ruled table - remove ruling from a table - printing 	<ul style="list-style-type: none"> • Carry out a search and replace of text • Insert superscripts, e.g. 20° • Insert subscripts, e.g. H₂O • Insert special characters and symbols, e.g. ©, ☒ • Produce printouts
<p>2 Be able to key in text from handwritten and typewritten drafts</p>	<p>2.1 Key in text, including</p> <ul style="list-style-type: none"> - capitalisation - punctuation <p>2.2 Key in text to specified layouts, including</p> <ul style="list-style-type: none"> - one-page display document - circular letter - multi-page technical document - create and complete a form <p>2.3 Key in a circular letter consistently from handwritten draft</p> <p>2.4 Key in a form as a two-column ruled table including a boxed section consisting of three columns</p> <p>2.5 Complete the created form, using information given</p>	<ul style="list-style-type: none"> • Read and transcribe variable quality manuscript • English spelling, punctuation and grammar • Retrieve text from pre-stored file and amend as shown in the draft, retaining existing font style/size • Circular Letter <ul style="list-style-type: none"> - Key in <i>Our</i> ref details as drafted, including capitalisation and punctuation - Produce a tear-off slip including: <ul style="list-style-type: none"> - a line of dashes from edge to edge of the paper, with a tolerance of 10 mm either side - lines of dots, extended to and aligned consistently at the right margin - bottom margin no more than 4 cm • Create a form from typed model given in draft, as a two-column ruled table with headings in the first column, including a three- or four-column section with headings above • Form must be ruled as shown in the draft • Column headings and data in columns in the form must be consistently aligned to the left • Complete the created form from information given • Insert today's date

Learning Outcomes <i>The learner will:</i>	Assessment Criteria <i>The learner can:</i>	Knowledge, understanding and skills
3 Be able to interpret implied and explicit instructions	3.1 Complete work within set timescales 3.2 Select stationery appropriate for document type 3.3 Use consistent style and presentation, including <ul style="list-style-type: none"> - clear line space before and after separate items in documents - display of date, measurement, weight, time, money, figures, dashes and hyphens - retain font style and size of recalled text 3.4 Comply with instructions for producing business documents, including <ul style="list-style-type: none"> - inserting date on a circular letter - inserting today's date on a form 3.5 Make amendments to text as shown in a draft	<ul style="list-style-type: none"> • Use appropriate stationery or templates • Retrieve pre-stored documents or templates • Date to be inserted in circular letter will be either "today's date" or "month and year" • Remove ruling from table as instructed • Amend text as shown in draft: <ul style="list-style-type: none"> - deletion with replacement words - deletion without replacement words
4 Be able to incorporate information from another source	4.1 Locate previously unseen information to extract from a separate source 4.2 Key in extracted text from another source	<ul style="list-style-type: none"> • Key in specific text, including data to be incorporated into the organisation chart and data to be incorporated into the form, from a separate source
5 Be able to check documents for accuracy	5.1 Check documents for accuracy, correcting mistakes as necessary	<ul style="list-style-type: none"> • Use of spellchecker • English spelling, punctuation and grammar • Proofreading skills • Use appropriate correction techniques to ensure work is accurate

Assessment

Assessment will consist of producing four business documents totalling no more than 950 words (500 to be input by candidates and no more than 450 words recalled) and will take the form of a 1 hour 45 minute test set and marked by OCR.

Results will be graded Distinction, Pass or Fail. The grade achieved will be stated on the certificate.

To achieve a Distinction, candidates must produce the documents with no more than 4 faults within the time allowed (1 hour 45 minutes).

To achieve a Pass, candidates must produce the documents with no more than 11 faults within the time allowed (1 hour 45 minutes).

Administration guidance

- Word processing equipment **must** be used to complete the examination.
- Centres must ensure that the recall material for this examination is available for candidates. Recall material is supplied for each examination by OCR publications on CD-ROM or can be downloaded free of charge from Interchange, OCR's secure website.
- Centres **must not** re-key or amend the pre-stored documents.
- Stationery: A4 plain paper.
- Printing: Candidates **must** carry out their own printing. No changes whatsoever may be made to the documents outside the time allowed for the examination. Printing may be undertaken in a period immediately following the examination and supervised by the Invigilator.
- For further information regarding administration for this qualification, please refer to the OCR document '*Admin Guide: Vocational Qualifications*' (A850) on the OCR website www.ocr.org.uk.

Guidance on assessment and evidence requirements

For detailed guidance, please refer to the marking criteria and tutor notes in this document.

Candidates must produce four business documents to a standard acceptable in the workplace and outcomes must be within the permitted error tolerance.

Penalties are given for errors and the same fault appearing more than once will incur a penalty each time. One fault only will be given to any one word* irrespective of the number of errors that may appear in that word.

For example, "miscellaneous" keyed in as "miss-selanium" will be penalised 1 fault, even though several faults have been incurred in the word. Presentation (Section 4) faults may also be applied.

* A word is defined as any normally recognisable word including a hyphenated word and associated punctuation and spacing. Other items that are treated as a word are:

- postcode
- initials and courtesy titles

- simple or complex numbers including money, times and telephone numbers
- simple or compound measurements.

Invigilators are given clear instructions to report any problems with printers, failure to do so can disadvantage candidates.

Errors will be divided into 4 categories:

Marking Criteria	Tutor Notes
Section 1 Faults - keying in errors One fault will be given for each word* which:	
1.1 contains a character which is incorrect (including upper case character within a word), or is illegible for any reason	<ul style="list-style-type: none"> • A penalty will be incurred for any word that contains a character that is incorrect or that includes an upper case character within a word, e.g. <i>LaBel</i> • Candidates may use English and mother tongue dictionaries and spellcheckers where available
1.2 has omitted or additional characters or spaces (including omissions caused by faulty use of correction materials/ techniques, e.g. hole in paper)	<ul style="list-style-type: none"> • A space inserted between a word and its associated punctuation, e.g. <i>word :</i> or <i>word ?</i> will incur 1 fault per instance • Incorrect or omitted paired punctuation e.g. brackets, single quotes will incur 1 fault per 'pair', e.g. (<i>Progress Group</i>), ' <i>Progress Group</i> '
1.3 contains handwritten character(s)	<ul style="list-style-type: none"> • Special characters and symbols must be inserted by use of computer – handwritten ones will incur 1 fault per word
1.4 has no space following it	
1.5 has more than 2 character spaces following it, except where appropriate, e.g. before postcode, after punctuation	<p>In continuous text, 1 fault per instance will be incurred for:</p> <ul style="list-style-type: none"> • more than 3 spaces appearing after a full stop, question mark, exclamation mark or colon • more than 2 spaces appearing after a comma, semi-colon, closing bracket, dash, apostrophe (at the end of a word) and closing single or double quotes • where a short line appears, this will be penalised if the first word following could have fitted at the end of the short line with at least 18 mm ($\frac{3}{4}$") to spare (measuring the short line against the longest line in the document) <p>NB: No penalty for inconsistency after punctuation e.g. 1 or 2 spaces inconsistently after a full stop</p>
1.6 contains overtyping, including overtyping of pre-printed material (per entry regardless of the number of words involved) e.g. text cutting through letterhead template, or lines on a form	

Marking Criteria	Tutor Notes
1.7 does not contain initial capitals: <ul style="list-style-type: none"> • as presented in the draft • for the first letter of a sentence 	<ul style="list-style-type: none"> • Candidates should key in text as presented in the draft. One fault per instance will be incurred for each initial capital drafted that has been keyed in as a lower case character • Failure to insert a capital letter following a penalty for an omitted full stop will not be penalised • Inserting a capital letter following a penalty for an incorrect full stop will not be penalised

Section 2 Faults – omissions and additions	
One fault will be given for:	
2.1 each word which is the wrong word and a word that has been omitted or added or not removed as instructed (e.g. a word which is crossed out in the draft)	<ul style="list-style-type: none"> • Failure to delete recalled text and insert replacement words will incur 1 fault for each word that has been omitted or is the wrong word • The incorrect incorporation of information from a Resource Sheet will be penalised 1 fault per omitted or additional word • The unspecified deletion and/or duplication of recalled text will incur 1 fault per word, unless it can be attributed to a deletion without replacement (see 2.2 below) • An instruction will be included in the circular letter to “Use today’s date” or to “Date for month and year only” • <i>Our ref</i> and reference details must be keyed in as shown in the draft, including capitalisation and punctuation (do not expand <i>ref</i>). Treat the whole reference as one unit for marking purposes. Errors in references incur one fault maximum per document • Candidates will incur one fault if they set up their own reference, or omit the reference or add their own initials to the reference • Special characters and symbols, e.g. © ® ™ Ω Σ ♠ ♣ ♥ ♦ ± ≈ < ≤ ≥ > ≅ ≤ ✂ ☎ ☒ ☺ ① ☒ ☑, must be keyed in exactly as shown, including spacing before and after the character/symbol • Inaccurate keying in of a chemical formula, e.g. H₂O keyed in as H₂0, will incur 1 fault per word • Failure to produce the tear-off slip will incur 1 fault per line and word omitted • Failure to make changes to the organisation chart as shown will incur 1 fault for each word or box that is omitted, incomplete or incorrect to a maximum of 5 faults • Omitted or additional items on the form (in Part 1 and/or Part 2) will incur 1 fault per word • Today’s date should be inserted on the form, against the date heading, unless otherwise instructed • One fault will be incurred for each instance of a missing, incomplete or incorrect date to be inserted, on the letter and form, as instructed on the front cover of the Question Paper • All errors in other dates are penalised per element • Any style of date is acceptable, with the exception of the American numeric format, e.g. 12/25/2011 as Christmas Day

Marking Criteria	Tutor Notes
	<ul style="list-style-type: none"> • The date must appear below the letterhead and above the salutation of the letter and should have a clear line space above/below • If a date appears in a document that does not require dating, this will be penalised 1 fault maximum unless the date appears as part of the personal details or above the first line of the document or below the last line of the document
2.2 each instance of failure to delete recalled text as instructed	<ul style="list-style-type: none"> • Failure to delete recalled text as shown in the draft will incur 1 fault maximum. This relates to deletions where there are no replacement words written above the words crossed through
<p>2.3 omission of implied or explicit instructions (regardless of the number of words involved) for failure to:</p> <ul style="list-style-type: none"> - ensure consistent use of font style/size throughout a document - edit word art – change words and font size - move word art - insert a text box, shaded or unshaded, with a border - use different font styles - insert a picture as instructed - insert a full-page fancy border - carry out a case change - produce a tear-off slip - carry out a search and replace - insert headers/footers - insert page numbers on continuation sheets - create and produce a form following the model given 	<ul style="list-style-type: none"> • Changes made to the font style/size of recalled text in a document where there is no instruction to do so will incur 1 fault maximum per examination paper • Failure to amend the word art and/or font size as instructed will incur 1 fault maximum • Failure to move the word art to the position specified will incur 1 fault • Failure to create a text box as instructed will incur 1 fault maximum – to include shading, border and vertical position • The text box may be positioned anywhere between the margins, but must appear in the correct position vertically as shown in the draft • The entire text box must be shaded, not just text • A border must be inserted around the text box • All text in a shaded text box must be clearly readable • Failure to use a different font style in the text box, as instructed, will incur 1 fault. Emboldening, italicising or changing the size of the existing font will not be acceptable <p>NB: if the change is not clear, e.g. using similar sans serif fonts, a penalty will be incurred</p> <ul style="list-style-type: none"> • Any picture may be used from any source but candidates should re-size if necessary to ensure that all the text will fit on to one side of a sheet of A4 paper • The picture must be positioned in the exact position as instructed – horizontally at the left or right margin or in the centre and vertically at the exact position as shown in the draft • Inserting a full-page border that is not a fancy border or a border that is not full page will incur 1 fault • Case change of recalled text may be from lower case to upper case or from upper to lower case • Failure to change the case of all text as instructed will incur 1 fault, but where candidates incur errors when rekeying the text, 1 fault per word will be incurred under 2.1 • Candidates should ensure, where a sentence is involved, that the first letter is a capital (e.g. by using sentence case) • In the circular letter space need not be left for a recipient address

Marking Criteria	Tutor Notes
	<ul style="list-style-type: none"> • The tear-off slip must include a line of dashes from edge to edge of the paper, with a tolerance of 10 mm either side; otherwise 1 fault maximum will be incurred • The lines of dots should extend to within 18mm (3/4") of and be aligned consistently at the right margin – failure to do so will incur 1 fault • The bottom margin of the completed tear-off slip must be no more than 4 cm; otherwise, 1 fault will be incurred • Use of hyphens or other characters instead of dots will incur 1 fault maximum • Failure to leave a space between the heading and lines of dots will incur 1 fault maximum • 1 fault maximum will be incurred if words are not replaced as instructed • A header or footer not inserted as instructed (including keying in errors) will incur 1 fault maximum • An additional penalty under 4J will be penalised for capitalisation errors in the header/footer • Header or footer may be in any position in the header/footer zone but must be in the same font style and size as the remainder of the text in the document • If page number not inserted on continuation sheet(s), 1 fault maximum is incurred • Page numbers may appear in any position and may be in any style • Page numbers inserted on single-page documents will incur 1 fault per examination paper • Errors and omissions related to page numbers are limited to 1 fault maximum per examination paper • The form must be created and produced following the model given, including relative column sizes. • Failure to produce a printout of the blank form will incur 2 faults maximum (1 fault for failure to print the form and 1 fault for failure to show the ruling) • The form will be a two-column ruled table and will include a boxed section, with single-line headings, and 3-4 columns for insertion of tabulated text • Failure to remove the ruling from the form (in Part 2) will incur 1 fault

Section 3 Faults - transpositions and misplacements One fault will be given for each instance of:	
3.1 words that are misplaced within text, where there is no instruction	<ul style="list-style-type: none"> • Data that is entered in the wrong position on the form will incur 1 fault per instance
3.2 failure to paragraph as per draft or as specified by a correction sign, e.g. new paragraph or run on	

Marking Criteria	Tutor Notes
Section 4 Faults – presentation No more than one fault per paper for each of the following items:	
4A left and/or top margins of less than 13 mm, or ragged left margin	<ul style="list-style-type: none"> • Ragged left margin, e.g. additional character spacing at the beginning of a line or paragraph. • Main and subheadings not keyed in at the left margin, as presented in draft – unless otherwise instructed (e.g. centring) or recalled • The organisation chart may extend into the left/right margins but if the left or right margin is less than 13 mm, a penalty will be incurred
4B no clear line space before and after separate items within a document	<ul style="list-style-type: none"> • Failure to leave a clear line space before and after separate items within a document, e.g. before/after headings, between paragraphs • Failure to leave a clear line space above/below a text box • Failure to leave a clear line space between items in the tear-off slip <p>NB: Where letterhead template is centred or right aligned there is no requirement for a clear line space below the letterhead. Where the letterhead template is left aligned a clear line space must be left</p>
4C failure to use line spacing as instructed	This includes: <ul style="list-style-type: none"> • failure to change line spacing as instructed
4D failure to emphasise text as instructed	<ul style="list-style-type: none"> • Emphasis extended beyond the section of text specified • Additional emphasis of text in a document where not requested (except for headings – see 4J below) • Emphasis may be bold, italic, underline, change of font style/size only
4E not applicable to this unit	
4F failure to centre text or data as instructed	<ul style="list-style-type: none"> • Failure to centre text or data as instructed to within 13 mm over the typing line
4G work which is creased, torn or dirty (including conspicuous corrections)	<ul style="list-style-type: none"> • Invigilators must notify OCR of any machine faults resulting in marks on the paper • Invigilators should also report any problems with printers, so as not to disadvantage candidates
4H incorrect stationery used (e.g. OCR supplied template, A4 plain paper)	<ul style="list-style-type: none"> • The pre-stored letterhead must be used to produce the circular letter • Templates, including company information and margins, must not be altered in any way • Complimentary close and/or routing details carried on to continuation page without at least two lines of body text will incur 1 fault maximum
4I inconsistent spacing between and within similar items within a document	<ul style="list-style-type: none"> • Inconsistent spacing (including line spacing) between and within similar items is only penalised if a comparison with a similar item can be made within the same document • Inconsistent line spacing above and below an item, for example an inset portion, will not be penalised as there is no further instance of inseting within the same document for comparison

Marking Criteria	Tutor Notes
<p>4J use of initial capitals where not presented in draft, or:</p> <ul style="list-style-type: none"> - closed capitals used where not presented in draft - failure to use closed capitals as presented in draft - failure to key in headings with initial capitals and underlined as presented in draft 	<p>This includes:</p> <ul style="list-style-type: none"> • use of initial capitals where initial capitals were not presented in draft, e.g. <i>Sincerely</i> in complimentary close • closed capitals used where not presented in draft, e.g. <i>White</i> keyed in as <i>WHITE</i> • failure to use closed capitals as presented in draft, e.g. <i>DISEASES</i> keyed in as <i>Diseases</i> • failure to underline headings, including subheadings, as presented in the draft, e.g. "<u>Miscellaneous Household Items</u>" keyed in as "Miscellaneous Household Items" • capitalisation faults in postcodes • Candidates should key in data exactly as shown in the draft but additional emboldening, italicising or underlining of headings will not be penalised
<p>4K inconsistent use of alternative spellings within a document</p>	<ul style="list-style-type: none"> • Alternative spellings that may be found in an English dictionary will be accepted but a penalty will be incurred if that alternative spelling is used inconsistently, e.g. <i>organize</i> but <i>organisation</i> within the same document
<p>4L inconsistent display of dates, measurements, weights, times, money, figures, dashes/hyphens, lines of ruling within a document</p>	<ul style="list-style-type: none"> • Dates must be of consistent style throughout a document. For example, if full style is used such as <i>12 January 2011</i>, this style should be used for all subsequent dates within the same document. (Please also refer to Section 2.1 Notes above) • Measurements and weights must be used consistently. For example, <i>5 cm</i> or <i>5cm</i>; <i>16 kg</i> or <i>16kg</i> • Times must be keyed in consistently within a document. For example <i>10.30 am</i> and <i>2.30pm</i> within the same document would incur a penalty. Candidates must ensure that times that they key in are consistent with those that may appear in recall material. Candidates should not change times from 12-hour clock to 24-hour clock or vice versa, unless instructed to do so • Money: there must be no character space between £ and the amount, e.g. <i>£60</i>. In columns and tables, consistent spacing between £ and amount would not be penalised • The display of figures should be an "acceptable system", e.g. <ul style="list-style-type: none"> - all figures including "1" - all words (but use of words such as <i>twenty-five</i> or <i>twenty five</i> must be consistent) - <i>one</i> as a word, all others as figures - <i>one</i> to <i>nine</i> or <i>ten</i> as words and then <i>10</i> or <i>11</i> upwards as figures - <i>one</i> to <i>twenty</i> as words and then <i>21</i> upwards as figures • Where dashes or hyphens are used to represent the word "to" (e.g. <i>15-22</i> or <i>15 – 22</i>) these must be used consistently throughout a document • Telephone numbers must be presented as draft. For example <i>024 7647 0033</i> keyed as <i>02476470033</i> would incur a penalty. (Please note: an inaccurate telephone number (e.g. <i>02576470033</i>) would also be penalised under 1.1/1.2.)

Marking Criteria	Tutor Notes
4M inconsistent use of open or full punctuation within a document	<ul style="list-style-type: none"> • A full stop appearing in any abbreviation such as Enc, cc, eg, am when open punctuation has been used • A missing full stop in any abbreviation such as Enc., c.c., e.g., a.m., where full punctuation has been used
4N insertion of an additional comma which alters the meaning of a sentence	<ul style="list-style-type: none"> • Candidates should key in punctuation as presented in the draft. However, the insertion of an additional comma will only be penalised if this alters the meaning of the sentence
4O not applicable to this unit	
4P failure to align text and figures in columns to the left consistently <ul style="list-style-type: none"> - failure to align figures in columns to the left, right or centre consistently - failure to align data in columns consistently with column headings 	
4Q not applicable to this unit	
4R text that touches a vertical line in a text box or on the form	<ul style="list-style-type: none"> • If text touches any vertical lines in a text box – 1 fault will be incurred under 4R
4S failure to justify text or data as instructed	A penalty will be incurred: <ul style="list-style-type: none"> • where right margin justification requested but left margin is ragged • if justification is lost on last line of page • if justification used when a right ragged margin is requested
4T failure to adjust margins or line length as instructed	<ul style="list-style-type: none"> • Left and top margins must be adjusted as instructed, within a 3 mm tolerance • Adjusting other margins as well as or instead of the left and top margins will incur 1 fault
4U failure to inset from left margin as instructed	<ul style="list-style-type: none"> • The inset measurement must be exactly as instructed. If extra text has been incorrectly included within the inset, a penalty will be incurred • Insetting the wrong section of text incurs 1 fault maximum