Text Processing (Business Professional)

Unit Title:	**Document Presentation**
OCR unit number:	03934
Level:	3
Credit value:	6
Guided learning hours:	60
Unit reference number:	K/501/4218

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 complex and specialist business documents to a standard that meets the requirements of employment. Candidates will use a range of complex word processing functions and work accurately within time constraints.

Learning Outcomes *The learner will:*	Assessment Criteria *The learner can:*	Knowledge, understanding and skills

1 Be able to use a word processor	1.1 Identify, select and use appropriate functions of a word processor, including
	- open files
	- save files
	- setting and adjusting margins
	- line spacing
	- alignment, including left, centre, decimal numbers, money and full justification
	- insert shaded and unshaded text boxes
	- use different fill effects in text boxes
	- use a variety of font styles and sizes
	- insert decorative horizontal dividers
	- change font size of recalled text to a larger size
	- insert a diagram
	- case change of recalled text
	- ways of emphasising text
	- indenting text from left and right margins
	- insert headers and footers
	- page numbering
	- re-number pages
	- delete existing page numbering in recalled text
		• Retrieve pre-stored documents, retaining font style and size
		• Set margins of at least 13 mm
		• Adjust left and right margins (line length)
		• Left alignment, including main and subheadings, as presented in draft
		• Alignment of decimal points
		• Two text boxes are required:
		  - an unshaded text box of specified size and specified border point size, with text centred horizontally within text box
		  - a shaded text box in a specified position (e.g. in centre of page, at left margin) with specified fill effect, e.g. wavy lines, dots, etc
		• Centre one or more lines of text
		• Change line spacing to treble/double/single
		• Change text to full justification

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
The learner will:	*The learner can:*	

	- insert full-page borders
	- insert paragraph borders, with/without shading
	- insert text in two columns of specified widths
	- insert accents, superscript and subscript characters and special characters and symbols, retaining original font style and size
	- insert bullet points in recalled text
	- insert automatic fields, i.e. "Created on", filename and path
	- modify a two-column unruled table to a three-column unruled table
	- pagination
	- widows and orphans
	- printing
		• Full-page border may be whole document, first page only, all except first page
		• Diagram will consist of consistent shapes and lines
		• Delete an existing page number in recalled text
		• Insert page numbers in documents as instructed
		• Case change of related instances, e.g. section headings in 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 and right margins
		• Insert headers and footers on odd and even pages in specified positions, using specified font style/size
		• Insert a variety of special characters, retaining original font style and size:
		  - accents, e.g. ç, î
		  - superscripts, e.g. 15 $^{\circ}$C
		  - subscripts, e.g. C_3H_8
		  - special characters and symbols, e.g. ®, ☎, 📖
		• Print one copy of each document
		• Produce a screenprint showing evidence of use of, and width of, columns in display document with two columns

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Learning Outcomes _The learner will:_	Assessment Criteria _The learner can:_	Knowledge, understanding and skills

2 Be able to key in text from handwritten and typewritten drafts	2.1 Key in text, including
	   - capitalisation
	   - punctuation
	
	2.2 Key in text to specified layouts, including
	   - one-page display document
	   - one-page display document incorporating two columns
	   - multi-page technical document
	   - multi-page document with two columns for modification to three columns
	
	2.3 Key in a one-page display document incorporating two columns of specified widths
		• Read and transcribe variable quality manuscript
		• English spelling, punctuation and grammar
		• Retrieve text from pre-stored file and amend as shown in the draft, maintaining original font style and size
		• Use specified font style and size in the created display document

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
	   - clear line space before and after separate items in documents
	   - display of date, measurement, weight, time, money, figures, dashes and hyphens
	   - alignment of bullets at left margin
	   - alignment of bulleted text where text continues to a second or subsequent line
	   - retain font style and size of recalled text
	
	3.4 Comply with instructions for amending business documents, including
	   - modify layout to conform to a house style given in a separate source
	
	3.5 Make amendments to text as shown in a draft
		• Use appropriate stationery, i.e. A4 plain paper and portrait orientation
		• Retrieve pre-stored files and amend text as shown in the draft, maintaining existing font style and size
		• Amend text as shown in draft:
		  – deletion with replacement words
		  – deletion without replacement words
		  – follow correction signs:

new paragraph ⌐ or //

run on ⌒

insertion with word(s) above ⋀ or balloon with arrow e.g.

no marginal instructions

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Learning Outcomes *The learner will:*	Assessment Criteria *The learner can:*	Knowledge, understanding and skills
4 Be able to incorporate information from separate locations within the same document	4.1 Identify and key in information in correct positions within the same document	• Key in specific information within a document in positions indicated by symbols
5 Be able to incorporate information from another source	5.1 Locate information to extract from a separate source 5.2 Key in extracted text from another source	• Key in specific information, a diagram, from a separate source
6 Be able to check documents for accuracy	6.1 Check documents for accuracy, correcting mistakes as necessary	• 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 complex and specialist documents totalling no more than 1,250 words (550 to be input by candidates and no more than 700 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 5 faults within the time allowed (1 hour 45 minutes).

To achieve a Pass, candidates must produce the documents with no more than 14 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.

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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 complex and specialist 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-selanious" 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	• 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. *LaBel* • 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)	• A space inserted between a word and its associated punctuation, e.g. *word :* or *word ?* will incur 1 fault per instance • Incorrect or omitted paired punctuation e.g. brackets, single quotes will incur 1 fault per 'pair', e.g. *(Progress Group)*, *' Progress Group '*
1.3 contains handwritten character(s)	• Accents that are handwritten will incur 1 fault per word • 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	In continuous text, 1 fault per instance will be incurred for: • 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 (¾") to spare (measuring the short line against the longest line in the document) NB: No penalty will be incurred for inconsistency after punctuation e.g. 1 or 2 spaces inconsistently after a full stop
1.6 contains overtyping, including overtyping of pre-printed material (per entry regardless of the number of words involved)	
1.7 does not contain initial capitals: • as presented in the draft • for the first letter of a sentence	• 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

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Marking Criteria	Tutor Notes
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)	• 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 keying in of material shown as a house style in a Resource Sheet will be penalised 1 fault per 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) • Accents must be keyed in exactly as shown in the draft • Errors in text within a text box will be penalised 1 fault per word • Inaccurate keying in of a chemical formula, e.g. NaOH keyed in as Na0H or Na_2CO_3 keyed in as $Na_2\,C0_3$, will incur 1 fault per word • Superscript and subscript characters, e.g. 20 m^2 and Na_2CO_3, must be keyed in exactly as shown, including spacing • Special characters and symbols, e.g. © ® ™ Ω ∑ ♠ ♣ ♥ ♦ ± ≈ < ≤ ≥ > ≅ ≤ ✂ ☎ ⊠ ☺ ① ⊠ ☑ ♀ ♂ ✖ ✓ α β, must be keyed in exactly as shown, including spacing before and after the character/symbol • In the diagram, shapes omitted or incorrect and omitted or additional words will incur 1 fault each to a maximum of 6 faults • In the diagram, lines omitted, too short or too long will incur 1 fault per instance to a maximum of 3 faults • All errors in dates are penalised per element • 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	• 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

Marking Criteria	Tutor Notes
2.3 omission of implied or explicit instructions (regardless of the number of words involved) for failure to: - ensure consistent use of font style/size throughout a document - conform to a house style - carry out a case change - insert text boxes, as instructed - use specified font style and size - use different font styles and sizes - print display document as instructed - insert full-page border - insert paragraph border with/without shading - key in text in two columns - produce a screenprint - insert two decorative horizontal dividers - insert headers and footers - insert page breaks - renumber pages as instructed - insert bullet points - insert a diagram - avoid widows and orphans - modify a two-column table to three columns - insert automatic fields, i.e. Created on, filename and path and page number in the header and/or footer area	*General* • Changes made to the font style/size throughout a document where there is no instruction to do so will incur 1 fault maximum per examination paper • Failure to use a consistent font style and size throughout a document (where there is no instruction to use a specific font style/size) will incur 1 fault maximum per examination paper • Save documents using filenames as instructed • Special characters and symbols should be presented in the same font style and size as the remaining text in a document; otherwise 1 fault maximum per examination paper will be incurred • Page numbers inserted on single-page documents will incur 1 fault per examination paper • If page numbers not inserted on continuation sheets, 1 fault maximum is incurred • Failure to avoid widows or orphans will incur 1 fault per instance • The document must be paginated in order to ensure that continuous text (including headings) extends to at least two lines at the bottom (orphan) and top (widow) of every page *Document 1 – one-page display document* • Failure to conform to the house style given in the Resource Sheet will be penalised 1 fault maximum • Faults incurred during the creation of text boxes will incur 1 fault maximum per text box (please also refer to 2.1) • Failure to create a text box as instructed will incur 1 fault per text box • Failure to use the fill effect as instructed will incur 1 fault • The shaded text box must be positioned in the correct position horizontally as instructed, and vertically as shown in the draft • The entire text box must be shaded, not just text • A border must be inserted around the shaded text box, any style will be accepted • All text in a shaded text box must be clearly readable • Failure to use a different font style and size in the shaded text box will incur 1 fault • Failure to use a larger font size as instructed will incur 1 fault NB: If the font/styles changes are not clear, e.g. using similar sans serif fonts or changing the font size by one point, a penalty will be incurred *Document 2 – display document with 2 columns* • Failure to use the specified font style and size throughout the document will incur 1 fault • Faults incurred during the creation of text boxes will incur 1 fault maximum per text box (please also refer to 2.1)

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Marking Criteria	Tutor Notes
	• Failure to create a text box as instructed will incur 1 fault per text box
	• In the unshaded text box, failure to use the specified border style (e.g. ¾ pt, 1½ pt) will incur 1 fault
	• Failure to centre text horizontally within the unshaded text box will incur 1 fault
	• Failure to use the specified font style and size in the unshaded text box will incur 1 fault
	• Failure to print document on one side of a sheet of A4 paper as instructed will incur 1 fault
	• Failure to format text into two columns as instructed will incur 1 fault
	• Failure to use column widths as instructed will incur 1 fault maximum
	• Inconsistent line spacing between paragraphs in two columns will be accepted
	• Where there are no subheadings within the text in the two columns, the text may be keyed in any order
	• If the two columns include ruling, 1 fault will be incurred
	• Failure to produce a screenprint which clearly shows the width of the two columns will incur 1 fault
	NB: Evidence on the screenprint showing column widths may be display of horizontal ruler or a dialogue box. A dialogue box will be accepted even if only Column 1 shows correct measurement, so long as the 'equal column' option, or equivalent, is ticked
	• Failure to insert a decorative horizontal divider using a computer will incur 1 fault max
	• Horizontal dividers must be decorative and inserted by computer, for example options within ClipArt, not manually
	• Horizontal dividers must be of consistent style – otherwise, 1 fault will be incurred
	• Horizontal dividers must be in vertical position shown in draft but may be in any horizontal position, e.g. centred. Alignment of both dividers must match
	• Failure to insert the automatic field Created on in the footer area will incur 1 fault. Where candidates do not have access to the automatic field 'Created on', the 'Publish date' option in MS Word 2007, for example, will be accepted where a date and/or time only appears
	• Any date will be accepted in the Created on automatic field, as candidates may not have control of the set up of this automatic field
	• Any font style and size may be used for data in automatic fields

Marking Criteria	Tutor Notes
	Document 3 – multi page technical document
	• Inserting a page border that is not full-page will incur 1 fault
	• Failure to insert full-page border on pages as specified will incur 1 fault maximum
	• Any style of page border may be inserted, but size must be full-page and not simply around the text.
	• The header/footer may appear inside and/or outside the border
	• Failure to insert a paragraph border with or without shading as instructed will incur 1 fault
	• Failure to insert headers and footers on odd and even pages as instructed (including keying in and capitalisation errors and incorrect position) will incur 1 fault per header/footer
	• Failure to use the specified font style/size in headers/footers will incur 1 fault maximum per document
	NB: Errors in headers/footers will be limited to 4 faults maximum
	• Headers/footers must be in exact position as instructed – either aligned at the margins or centred over the typing line
	• Headers/footers may appear within the top/bottom margins
	• Failure to insert page breaks as instructed will incur 1 fault maximum
	• Failure to renumber the pages in the specified position starting with the number as instructed will incur 1 fault. (Headers/footers that appear on the wrong pages as a result of failure to renumber pages will not incur an additional penalty)
	• A page number that overtypes a header or footer will incur 1 fault
	• Page numbers may be in any font style/size
	• Failure to insert bullet points at the left margin, as instructed will incur 1 fault maximum
	• The bullet points must be of a consistent style – if not, 1 fault maximum will be incurred
	• The diagram must be inserted by use of computer, not handwritten
	• Failure to insert the diagram will incur 6 faults maximum
	• Text within the diagram may be of a different font style/size to the remainder of the document
	• A frame inserted around the diagram will incur 1 fault
	Document 4 – multi page document with 3 columns
	• Failure to conform to the house style given in the Resource Sheet will be penalised 1 fault maximum
	• Case change of recalled text may be from lower case to upper case or from upper to lower case
	• Failure to apply a case change instruction to all items as instructed will incur 1 fault maximum

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Marking Criteria	Tutor Notes
	• Where candidates incur errors when rekeying the text instead of using case change, 1 fault per word will be incurred
	• Applying case changes to additional items not specified will incur 1 fault maximum
	• Failure to create a third column as instructed will incur 1 fault maximum
	• Text appearing in second column which should be in the third column will incur 1 fault maximum
	• Text appearing in second and third columns will incur 1 fault per word to a maximum of 6 faults
	• Text in columns not aligned horizontally will incur 1 fault maximum
	• Table with three columns must not be ruled – if ruled, 1 fault will be incurred
	• Failure to insert the automatic filename and path, using the specified filename, in the header or footer area will incur 1 fault max
	• Any font style and size may be used for data in automatic filename and path and this may be in all capitals, all lower case, in sentence case or a mixture
	• Failure to insert the automatic page number on all pages in the specified style (e.g. Page 1 of 2) in the header or footer area will incur 1 fault.
	• Automatic page numbers may be in any font style/size

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	• Data that is entered in the wrong position will incur 1 fault per instance • Text incorrectly inserted within shapes in a diagram will incur 1 fault max
3.2 failure to paragraph as per draft or as specified by a correction sign, e.g. new paragraph or run on	

Section 4 Faults – presentation	
No more than one fault per paper for each of the following items:	
4A all margins (top, bottom, left and/or right) of less than 13 mm, unless otherwise instructed, or ragged left margin	• 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 or as recalled– unless otherwise instructed (e.g. centring) • Not aligning bullet points at left margin • The diagram may extend into the left/right margins but if the left or right margin is less than 13 mm, a penalty will be incurred

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Marking Criteria	Tutor Notes
4B no clear line space before and after separate items within a document	• 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
4C failure to use line spacing as instructed	• Failure to change line spacing as instructed
4D failure to emphasise text as instructed	• Emphasis extended beyond the required portion • Additional emphasis of text where not requested (except for headings – see 4J below) • Emphasis may be bold, italics, underlining, change of font style/size
4E allocation of space not as instructed	• Failure to insert a text box of the exact size specified
4F failure to centre text or data as instructed	• 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)	• 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. A4 plain paper, portrait)	
4I inconsistent spacing between and within similar items within a document	• 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 insetting within the same document for comparison

4J use of initial capitals where not presented in draft, or:
  – 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
	This includes:
	• use of initial capitals where initial capitals were not presented in draft, e.g. *Sincerely* in complimentary close
	• closed capitals used where not presented in draft, e.g. *White* keyed in as *WHITE*
	• failure to use closed capitals as presented in draft, e.g. *DISEASES* keyed in as *Diseases*
	• 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

4K inconsistent use of alternative spellings within a document	• 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. *organize* but *organisation* within the same document

Marking Criteria	Tutor Notes

4L inconsistent display of dates, measurements, weights, times, money, figures, dashes/hyphens, lines of ruling within a document	• Dates must be of consistent style throughout a document (including recalled text). For example, if full style is used such as *12 January 2011*, this style should be used for all subsequent dates within the same document. American numeric date format should not be used (e.g. 12/25/2011 as Christmas Day) (Please also refer to Section 2.1 Notes above)
	• Measurements and weights must be used consistently throughout a document (including recalled text). For example, *5 cm* or *5cm*; *16 kg* or *16kg*
	• Times must be keyed in consistently within a document. For example 10.30 am and 2.30pm within the same document would incur a penalty. Candidates must ensure that times are consistent with those that appear in recall text within a document. Candidates must not change times from 12-hour clock to 24-hour clock or vice versa, unless instructed to do so
	• Telephone numbers must be presented as draft. For example *024 7647 0033* keyed as *02476470033* would incur a penalty. (Please note: an inaccurate telephone number (e.g. *025 7647 0033*) would be penalised under 1.1/1.2.)
	• Money: there must be no character space between £ and the amount, e.g. *£60.* In columns and tables, consistent spacing between £ and amount would not be penalised
	• The display of figures should be an "acceptable system", e.g.
	  − all figures including "1"
	  − all words (but use of words such as *twenty-five* or *twenty five* must be consistent)
	  − *one* as a word, all others as figures
	  − *one* to *nine* or *ten* as words and then *10* or *11* upwards as figures
	  − *one* to *twenty* as words and then *21* upwards as figures
	• Where dashes or hyphens are used to represent the word "to" (e.g. *15-22* or *15 – 22*) these must be used consistently throughout a document

4M inconsistent use of open or full punctuation within a document	• 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	• 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	

Marking Criteria	Tutor Notes
4P - failure to align text and figures in columns to the left consistently - failure to align data in vertically with column headings	
4Q failure to align the decimal points in columns of figures such as sums of money	• Where numbers (including sums of money) with decimal points require the alignment of decimal points in columns, the first figure of the longest amount in each column should be left-aligned with the column heading
4R text that touches a vertical line in a text box	• Text that touches any vertical lines in a text box will incur 1 fault
4S failure to justify text or data as instructed	A penalty will be incurred: • where full justification requested but left margin is ragged
4T failure to adjust margins or line length as instructed	• The line length should be adjusted as instructed • There is a 3 mm tolerance on either side of the required length (e.g. for a specified line length of 12 cm – between 11.7 and 12.3 cm would be accepted)
4U failure to inset from left margin as instructed	• The inset measurement must be exactly as instructed. If extra text has been incorrectly included within the insetting, a penalty will be incurred • Insetting the wrong section of text from the left margin incurs 1 fault maximum
4V failure to inset from right margin as instructed	• The inset measurement must be exact. If extra text has been incorrectly included within the insetting, a penalty will be incurred • Insetting the wrong section of text from the right margin incurs 1 fault maximum

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