Gold Unit 7 Word Processing Software

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Overview

This is the ability to select and use a range of word processing software tools and techniques to produce documents that are at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.
Word processing tools and techniques will have the following characteristics:

- the software tools and functions will be at times non-routine or unfamiliar;
- the choice of techniques will need to take account of a number of factors or elements; and
- the user will take some responsibility for the inputting, manipulating and outputting of the information.

Examples of context: Typical documents may include – business letters and invoices with automated content (e.g. Auto Text, mail merge), more complex reports and content for web pages, longer documents where the use of styles becomes more important.

Assessor's guide to interpreting the criteria

General Information

QCF general description for Level 2 qualifications

- Achievement at QCF level 2 (EQF Level 3) reflects the ability to select and use relevant knowledge, ideas, skills and procedures to complete well-defined tasks and address straightforward problems. It includes taking responsibility for completing tasks and procedures and exercising autonomy and judgement subject to overall direction or guidance.

- Use understanding of facts, procedures and ideas to complete well-defined tasks and address straightforward problems. Interpret relevant information and ideas. Be aware of the types of information that are relevant to the area of study or work.

- Complete well-defined, generally routine tasks and address straightforward problems. Select and use relevant skills and procedures. Identify, gather and use relevant information to inform actions. Identify how effective actions have been.

- Take responsibility for completing tasks and procedures subject to direction or guidance as needed.

Requirements

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- Standards must be confirmed by a trained Gold Level Assessor or higher

- Assessors must at a minimum record assessment judgements as entries in the on-line mark book on the INGOTs.org certification site.

- Routine evidence of work used for judging assessment outcomes in the candidates' records of their day to day work will be available from their e-portfolios and on-line work. Assessors should ensure that relevant web pages are available to their Account Manager on request by supply of the URL.

- When the candidate provides evidence of matching all the criteria to the specification subject to the guidance below, the assessor can request the award using the link on the certification site. The Account Manager will request a random sample of evidence from candidates' work that verifies the assessor's judgement.

- When the Account Manager is satisfied that the evidence is sufficient to safely make an award, the candidate's success will be confirmed and the unit certificate will be printable from the web site.

- This unit should take an average level 2 learner 40 hours of work to complete.

Assessment Method

Assessors can score each of the criteria N, L, S or H. N indicates no evidence. L indicates some capability but some help still required. S indicates that the candidate can match the criterion to its required specification. H indicates performance that goes beyond the expected in at least some aspects. Candidates are required to achieve at least a S on all the criteria to achieve the full award.

Expansion of the assessment criteria

1. The candidate will enter and combine text and other information accurately within word processing documents

1.1 I can identify what types of information are needed in documents

Evidence: From documents produced by candidates and/or centre devised tasks.

Additional information and guidance

Types of information will include text, numerical data and graphical sources, information that is free to use (relate to licensing and copyright) information that supports a particular view or perspective, information that counters a particular argument or claim. There should be a good spread and variation across several documents submitted for evidence and candidates should be able to work largely self-sufficiently.

1.2 I can use appropriate techniques to enter text and other information accurately and efficiently

Candidates should be confident to enter text through a standard keyboard, cut and paste and import from other applications. They should be able to import graphics and tabulated information from a range of sources.

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Evidence: Candidates' documents including those produced from centre set tests and tasks if appropriate.

Additional information and guidance

There is no requirement for touch typing but candidates should sit with good posture and use both hands at the keyboard. They should use the SHIFT key for capital letters, NOT Caps lock. They should only use the spacebar to separate words. All other layout should be with centre, tab keys etc. They should appreciate that using spaces to format risks destroying the format if, for example font sizes are changed. They should know that .png, .jpg and .svg are the three key open standards for graphics and these should be used when possible. They should understand the trade of between quality and file size for .jpg images. They should demonstrate the capability of importing information from other documents with an understanding of why open standards for file formats are desirable for users and the dangers of monopolies based on proprietary formats. Proprietary formats reduce choice in the software tools used and result in higher costs. They make interoperability between applications more difficult.

1.3 I can select and use appropriate templates for different purposes

Candidates should demonstrate the use of at least 3 different templates in their documents with self-sufficiency.

Evidence: Candidates document files and/or centre devised test/task outcomes

Additional information and guidance

The main difference between level 1 and 2 is that the level 2 candidate should be self-sufficient in choosing and implementing templates for their documents in keeping with the general descriptions for level 2 in the QCF.

1.4 I can identify when and how to combine and merge information from other software or other documents

Candidates should be aware of data standards in the transfer of information from different digital resources

Evidence: Candidate's document files and/or centre devised test/task outcomes

Additional information and guidance

Candidates should be confident to cut and paste information appreciating the potential problems of carrying style information across. In some cases it is best to take plain text so that styles and formatting information are not confused between documents. There are also possible problems of formatting issues caused by missing fonts being substituted. Candidates should be able to use and evidence that they have knowledge and understanding of how to merge information.

1.5 I can select and use a range of editing tools to amend document content

Candidates should show that they can edit most familiar and unfamiliar but straightforward documents competently

Evidence: Candidates document files and/or centre devised test/task outcomes

Additional information and guidance

Documents should include those with text, graphics, multiple styles, non-complex tables (ie not tables within tables spreading over multiple pages).

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1.6 I can combine or merge information within a document from range of sources

Candidates should be competent to import information from other formats.

Evidence: Candidates' documents with identification of the sources, its format and successful integration in the document.

Additional information and guidance
With text, style information from different documents can cause problems where one style over rides another. It is often safest to import text information to a text editor to strip out all the style information so that it will automatically be given the default style in the target document. Any further styles can then be applied. If many short extracts are imported from a wide range of different documents the list of styles in the target import document can become confusing. In this context a range of sources should include at least 3 different file types eg .rtf, .htm, .doc, .odt, .txt. It should not be simply different documents in the same format.

1.7 I can store and retrieve document and template files effectively, in line with local guidelines and conventions where available

Candidates should demonstrate that they can save document and template files with sensible names for future use.

Evidence: Organisation of candidates' files in their user area. Assessor observations of candidates saving and retrieving files.

Additional information and guidance
The most important thing is to name files so that they can be identified and retrieved some time later.

2. The candidate will create and modify layout and structures for word processing documents

2.1 I can identify the document requirements for structure and style

Candidates should identify the document requirements based on the purpose and audience. They should be familiar with pager orientation, e.g. portrait and landscape and page sizes such as A3, A4, A5 and that US sizes are based on a different standard. They should identify clarity, consistency and simplicity as generally desirable characteristics.

Evidence: From candidates files or centre set tests/tasks

Additional information and guidance
With the rise in importance of the internet, a lot of information that is put into Word Processor files would be better on web pages. This makes the information more accessible and easier to integrate with other information. Candidates should learn that unless there is a clear need to print the information on paper with particularly complex layout, it might be better to use a page editor on the web or an on-line word processor rather than technology designed specifically for producing paper documents. There is a blurring of the boundaries between what is traditionally considered to be Word Processing software, DTP software and web publishing software. Candidates should be provided with opportunities that require them to make decisions about the requirements for structure and style in relation to the tools selected. Word processing software that produces files in proprietary formats is a risk because often those formats change over time and eventually files can not be opened once the software producer decides not to support earlier versions of the software. This is particularly important for documents that are likely to be archived for future reference perhaps years in the future.

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2.2 I can identify what templates and styles are available and when to use them

Candidates should be aware of any templates and styles that are available and also that they can use a commonly used document as the basis for the design of similar documents needed in the future.

Evidence: Candidate files and documents and/or centre devised tests or tasks.

Additional information and guidance
Templates and styles can be used together to shortcut development and to provide consistency eg a house style for the organisation. Candidates should be discouraged from using local effects such as changes of font size except in very simple and short documents. Any documents of several pages should use defined styles consistently so that changing the style definition will change every instance of it throughout the document. Styles should be used sparingly. A suitable choice is to use a sans serif font for titles and side-headings and a seriffed font for the main text. Each heading based on the same type face but at different font sizes. Under-lining is rarely necessary when using a word processor. Underlining grew from a need for a means of emphasis on typewriters where styles and effects are extremely limited.

2.3 I can create and modify columns, tables and forms to organise information

Candidates should demonstrate the use columns, tables and forms for practical effect in their documents
Evidence: Candidates documents, centre set tests or tasks.

Additional information and guidance
Candidates work should demonstrate that they can use appropriate layout conventions when working with columns and rows. Note that there is widespread bad practice using word processor documents to collect information in surveys and similar situations. Such information should be collected using a database application typically through a web page. When working with a proprietary word processor such as MS Word, candidates should check that their work exports to suitable open formats such as .rtf or .odt (pdf if the receiver is not expected to edit the contents) so that other people are not forced to buy particular products. The more complex the document structure e.g. multiple tables flowing across pages, the more likely it is that import filters from other software will fail. Government employees in particular need to be sensitive to the fact that public information should be publicly accessible without having to buy particular products from particular suppliers. If using a proprietary file format is unavoidable, keep the structure as simple as possible. Never use the space bar to format text apart from separating two words. In tables CTRL TAB is a widely used shortcut for tabs in tables since the tab key moves between columns. For simple one page flyers, a free drawing program such as Inkscape might be a better choice that a Word processor because the tools for aligning text and graphics objects are better.

2.4 I can select and apply styles to text

Candidates should be aware of the pre-defined styles available and demonstrate their application iin a range of contexts.

Evidence: From candidate documents and/or centre devised tests of tasks.

Additional advice and guidance
Candidates that can define their own styles and build new styles from those provided are operating at a higher level that required but those that are able enough t cope with this should be encouraged. The simplest pre-defined styles to apply are the heading styles.

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3. The candidate will use word processing software tools to format and present documents effectively to meet requirements

3.1 I can Identify how the document should be formatted to aid meaning

Candidates should provide at least 3 completed documents that are formatted appropriately to make it easy to extract the information presented.

Evidence: from candidate documents and/or centre devised tasks.

Additional information and guidance
Documents do not have to be complex. The most important aspects are to use layout and styles to aid clarity and that is often a matter of keeping things simple. Since this is a matter of identifying how the document should be formatted it implies that candidates can be given a choice of options to choose from. Candidates that are self-sufficient in deciding on appropriate formats including developing aspects themselves are "H" on this criterion.

3.2 I can select and use appropriate techniques to format characters and paragraphs

Candidates should should be able to use subscripts, superscripts and insert "special characters". They should be able to produce hanging indents for paragraphs and understand the difference between local effects, a paragraph style and a global style for the whole document.

Evidence: from candidate documents and/or centre devised tasks

Additional information and guidance
Candidates should produce documents showing at least some of the above characteristics in meaningful contexts self-sufficiently.

3.3 I can select and use appropriate page and section layouts to present and print documents

Candidates should produce documents that will preserve their layout when styles are changed so that presentation and printing will be formatted correctly.

Evidence: When changing a style, font size or editing a feature in a document the document layout is preserved.

Additional information and guidance
Any inappropriate use of spaces for formatting is likely to prevent this criterion from being met. Candidates should appreciate that apart from separating words in body text or titles, the spacebar should not be used. Common errors are using spaces for formatting in tables because the tab key moves between columns and CTRL Tab or some other key combination is needed for a tab in a table cell. They should know how to force the document to start a new page eg using that CTRL and Enter rather than putting several Enter characters in because any reformatting will stop the new section starting on a new page. Facilities vary between Word Processor applications but in general candidates should use the features designed to manage page and section layouts rather than simply achieving a visual effect which might produce a printout that looks right but which would have its layout destroyed by some simple changes to the original file.

3.4 I can describe any quality problems with documents

Candidates should evaluate at least 3 documents describing their strengths and weaknesses in terms of quality.

Evidence: Evaluation of their own and/or documents provided for them documented on web pages

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or in files.

Additional Information and Guidance
Quality includes layout, spelling and grammar, formatting, use of appropriate styles, over use of different fonts, size of files - e.g. due to graphics being stored in resolutions higher than needed, quality of images, file format being a closed format when the file has to be presented to a wide audience that might not have the same software as the originator, indexes not corresponding to referenced pages.

3.5 I can check documents meet needs, using IT tools and making corrections as necessary

Candidates should demonstrate that they can match key needs to a document and use the tools in their software to make adjustments and corrections.

Evidence: Candidates documents and/or centre devised tasks.

Additional Information and Guidance
Candidates should not be designated secure (S) if their work has obvious spelling errors that could be picked up by a spell-checker, significant formatting errors or if the document lacks relevance to its intended audience. It is reasonable for the candidate to ask for help but this should be initiated by the candidate after checking rather than the assessor checking the candidate's work and then telling the candidate what to do. The candidate should be becoming self-sufficient in identifying problems and needs and then using sources of information including other people to solve those problems.

3.6 I can respond appropriately to quality problems with documents so that outcomes meet needs

Candidates should respond appropriately when deficiencies are highlighted in their work

Evidence: Assessor observation, at least 3 good quality documents free from major quality issues.

Additional Information and Guidance
The key issue here is the response of candidates to quality issues. They should be accepting of advice and willing to make improvements. If they are unwilling or uncooperative they should not be awarded a Secure (S) judgement. They should provide evidence of responding to document critique such that the outcome is improved in order to meet needs.

Moderation/verification

The assessor should keep a record of assessment judgements made for each candidate and make notes of any significant issues for any candidate. They must be prepared to enter into dialog with their Account Manager and provide their assessment records to the Account Manager through the on-line mark book. They should be prepared to provide evidence as a basis for their judgements through reference to candidate e-portfolios and through signed witness statements associated with the criteria matching marks in the on-line markbook. Before authorizing certification, the Account Manager must be satisfied that the assessors judgements are sound.

Source URL: https://theingots.org/community/SIL2U7X

Links
[1] http://theingots.org/community/ITQ_UNIT_development
[2] http://theingots.org/community/handbook2

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