Level 3 - Unit 7 - Word Processing Software (6 credits)

Platinum - Unit 7 - Word Processing Software

Relevant LINKS

BACK TO ITQ UNITS **[1]**

Handbook home page

Overview (Under Development)

The candidate can understand, create a series of word processed documents and templates using the advanced features and facilities of the application. They need to be able to use complex formatting and layouts, as well as approved styles, to ensure the documents and templates are fit for purpose and can be used in a professional environment. They need to be able to format the documents and templates and use the more advanced tools to present the documents and they need to quality control the final outcomes.

A work activity will typically be 'non-routine or unfamiliar' because the task or context is likely to require some preparation, clarification or research to separate the components and to identify what factors need to be considered. For example, time available, audience needs, accessibility of source, types of content, message and meaning, before an approach can be planned; and the techniques required will involve a number of steps and at times be non-routine or unfamiliar.

Example of context – an example might be a series of documents and templates for a local business or government organisation. An extended document might be the production of a book for publishing on something like Lulu [2]. Centres are encouraged to download the TLM handbook in order to make their own version for their centre. L3 students can make handbooks for Entry Level or L1 students for example. This will require some advanced formatting and layout skills.

Activities supporting the assessment of this unit **[3]**

Example of work at this level **[4] (coming soon)**

Assessor's guide to interpreting the criteria

General Information

QCF general description for Level 3 qualifications

- Achievement at QCF level 3 (EQF Level 4) reflects the ability to identify and use relevant understanding, methods and skills to complete tasks and address problems that, while well defined, have a measure of complexity. It includes taking responsibility for initiating and completing tasks and procedures as well as exercising autonomy and judgment within limited parameters. It also reflects awareness of different perspectives or approaches within an area of study or work.

- Use factual, procedural and theoretical understanding to complete tasks and address

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problems that, while well defined, may be complex and non-routine.

- Address problems that, while well defined, may be complex and non-routine. Identify, select and use appropriate skills, methods and procedures. Use appropriate investigation to inform actions. Review how effective methods and actions have been.

- Take responsibility for initiating and completing tasks and procedures, including, where relevant, responsibility for supervising or guiding others. Exercise autonomy and judgement within limited parameters information and ideas

Requirements

- Standards must be confirmed by a trained Platinum 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 and files 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 3 learner 50 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. Candidates will enter and combine text and other information accurately within word processing documents

1.1 I can summarise what types of information are needed for the document and how they should be linked or integrated

Candidates should be able to formulate a clear plan including any complex linking activities such as

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mail merges or links to other applications.

Evidence: will be provided by candidate's portfolios and assessor observations and feedback.

Additional information and guidance

At this level, clear and detailed plans of what is going to be attempted with some idea of how are essential. Candidates should create some rough sketches and flow charts to explain what it is they are hoping to achieve and how all of the various elements might fit together. If it is one document that will incorporate all of these elements, then a clear diagram and work-flow will ensure that it is carried out effectively and efficiently. This kind of planning will also be useful in finding potential problems and dealing with them before they are working on the project itself and can't then change things. In terms of the information, they can also list possible sources of the data they require, the nature of the data, and how it might look and feel. They can explore other sample documents for guidance and think about layouts and formatting styles. The more time they spend on serious research and development, the easier the final piece will be to create and the better it will be in terms of the intended outcome. This phase might also be a good time to see if merging of other documents and systems will work as intended.

1.2 I can use appropriate techniques to enter text and other types of information accurately and efficiently
Candidates should be able to demonstrate their accuracy in data entry, as well as any techniques for making to process faster and more efficient.

Evidence: will be provided by candidate's portfolios and assessor observations and feedback.

Additional information and guidance

One key way to improve efficiency on data entry, regardless of application, is with the use of keyboard shortcuts [5]. Candidates should explore these techniques and incorporate them into their designs where appropriate. This may also include creating a guide for other users of the finished product to encourage them to use more efficient methods. This web based system uses a SCAYT (Spell Check As You Type) interface which helps with checking the quality of input and similar systems can be deployed on word processors. Word processors also include grammar checkers which can be used to improve the readability of their work.

1.3 I can create, use and modify appropriate templates for different types of documents
Candidates should be able to understand how and when to use templates to improve efficiency.

Evidence: will be provided by candidate's work and assessor observations and feedback.

Additional information and guidance

All word processed documents begin with templates and even a "blank" page has layout guidelines such as A4 size, 2.5cm margins and types of fonts etc. The candidates should be able to either create specialised templates, such as CVs for employment or books with chapters and sub-headings. They can also take existing templates that exist with word processing software and modify these for heir own use. This goes with 1.1 above by exploring the range of documents available to be produced by a word processing application to have a good understanding of the possible features and layouts that could be achieved.

1.4 I can explain how to combine and merge information from other software or multiple documents
Candidates should be able to demonstrate a range of skills of importing data and objects from other applications.

Evidence: will be provided by candidate's portfolios and assessor observations and feedback.

Additional information and guidance

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Most word processor applications have the ability to import and incorporate other types of data. Candidates can import and manipulate images and embed other objects to improve the visual impact of their document. They can also merge information from other office based applications, such as merging spreadsheet data or merging from a database to send out an email. In some cases, they may need to combine or merge pages from other word processed files to make a document more detailed and comprehensive. This is an explain criteria so the candidates need to offer quite a lot of detail about how this will be achieved. If they are creating a user guide for a client this would be a useful way to fulfill the requirements. It would also be helpful in the explanations to detail what can and can't be merged as this will show that they have tried various options in their analysis.

1.5 I can combine and merge information within a document from a range of sources
Candidates should be able to demonstrate an effective range of merge materials.

Evidence: will be provided by candidate's finished work and assessor observations and feedback.

Additional information and guidance

The candidates work should clearly demonstrate the incorporation of a range of data from other sources and types. In 1.4 they will have discussed what it possible and tried some different options and in this criterion they can show which ones were best suited to completing their brief and how it has improved their work overall. At this level, it might also be useful for them to give some examples how how and why this technique would be used, since they may be guiding people who are unfamiliar of it as an option in word processing.

1.6 I can store and retrieve documents and associated files effectively, in line with local guidelines and conventions where available
Candidates should be able to demonstrate good file management skills.

Evidence: will be provided by candidate's portfolios and assessor observations and feedback.

Additional information and guidance

Different documents might have alternative file extension requirements and candidates need to show that they can work with a variety of extensions and forms and be able to both store and retrieve them as required. If they are working for a company as part of this process, the company might have particular requirements about file names and types and where they are stored. Local guidelines and conventions may require them to store material in several places, such as locally and in the cloud. It might require them to store in a open standards format, such as the Cabinet Office guidelines that apply to local and central government, for example this Transport Department guideline [6]. Most proprietary word processors will not store files in open standards by default, so they may need to adjust the save to suit. This will also apply to anything that has been merged or embedded into documents and files. If these have been merged in a local network, will this be accessible externally. If the merged elements are external, will they be useable without a login.

1.7 I can select and use tools and techniques to work with multiple documents or users
Candidates should be able to demonstrate the ability to use advanced sharing features of a word processor.

Evidence: will be provided by candidate's finished work and assessor observations and feedback.

Additional information and guidance

Word processors have a number of tools built in to allow some amount of collaboration. Most will have the ability to enable some form of tracking so that any changes made to a document can be checked by others. Most companies will use this feature to make sure that all people involved in important document creation have some say in the final outcome. Companies might also have some sign off process to check that everyone who would see and comment on a document has done so. This type of process is easier on cloud based systems such as Google docs or Office 365, but still

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perfectly possible on other desktop based products. Candidates need to explore and use these various techniques with competence to show how they can assist the use of multiple and complex document sharing that is common in large organisations. Candidates can also explore some of the cloud based document sharing options available such as One Drive, Dropbox or open alternatives such as Alfresco or OwnDrive.

1.8 I can customise the interface to meet needs
Candidates should be able to demonstrate a detailed understanding of user interface customisation.

Evidence: will be provided by by candidate's portfolios and assessor/customer observations and feedback.

Additional information and guidance

The standard layout on most word processor applications is designed for basic user knowledge and usage. The candidates will be using a number of advanced features and tools for their application and they will need to adjust the application interface to make these as effective and efficient as possible. They can modify the accessible icons and menus so optimise use, for example, making the icons available for effective sharing and merging activities. This customised interface can be used as the default for their clients who can then be shown how to add or take-away items from the menu to suit their needs. Some level of feedback from an end user would be beneficial for further development and for any follow-up activities required.

2. Candidates will create and modify appropriate layouts, structures and styles for word processing documents

2.1 I can analyse and explain the requirements for structure and style
Candidates should be able to demonstrate an understanding of document styles and layouts and explain in detail their purpose.

Evidence: will be provided by candidate's work and feedback.

Additional information and guidance

Every document is designed to convey a certain tone and meaning. The structure and layout of documents is made for this very precise purpose. A meeting agenda needs to be easy to follow and very concise as the detail will be added in the actual meeting's debate or discussions. A report needs to be organised and clear in layout so that the points made build upon previous ones and lead to an unambiguous conclusion. Candidates need to explore and evaluate as many document styles as possible to be absolutely clear of how they work and for what purpose. They can keep a log of styles and formats used and explain why they are effective and how they can be used in other instances. All of this will better inform their own designs. It might also be useful if candidates can visit a local organisation, such as a local branch of government, and see how documents are used and perhaps interview staff on what constitutes an effective style for different types of document.

2.2 I can create, use and modify columns, tables and forms to organise information
Candidates should be able to demonstrate a clear understanding of the use of tables and forms in document creation.

Evidence: will be provided by candidate's portfolios and assessor observations and feedback.

Additional information and guidance

Information that is organised into columns, such as 3 column layouts on pages, often make information easier to access and understand. Some academic publications are often organised into

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column layouts to make them clearer. Complex information in tables makes it more accessible by structuring the way the information so that side by side comparisons can be made. The design of forms is also quite difficult as you do not want to affect the outcomes. If the form is overly complicated, people may not bother to fill it in, but if it is not complicated enough, you might miss important data. Candidates need to demonstrate tht they are capable of using columns, forms and tables in their document creation, but also an awareness of when these need to be adjusted to work more effectively with some reasons and explanations as to why the changes were made. Feedback from clients would show that they agree that their judgements were sound and for the right reasons.

2.3 I can define and modify styles for document elements
Candidates should be able to demonstrate a clear understanding and application of advanced styling techniques.

Evidence: will be provided by candidate's portfolios and assessor/client observations and feedback.

Additional information and guidance

As noted earlier, even blank pages have a pre-applied style relating to fonts, paragraphs and headers, for example. Candidates need to create their own styles and formats and build these in to their document templates for consistency. They need to be able to modify templates or other people's templates in order to make these style changes permanent. The nature of the document created will determine much of this, for example academic journals will have very strict guidelines [7] to follow. The linked reference here is a common set of guidelines that many academic publications follow and tells would be authors what format the documents need to be in for submission. Other documents such as manuscripts or books will also have complex styles applied.

2.4 I can select and use tools and techniques to organise and structure long documents
Candidates should be able to demonstrate the skills required to format a long and complex document such as a book.

Evidence: will be provided by candidate's work and assessor observations and feedback.

Additional information and guidance

All the skills of word processing are in display in creating a large and complex document such as a book. It will require a table of contents, a range of heading and paragraph styles, indenting, formatting and other elements such as footnotes and end-notes. One project, as mentioned in the sample context at the top of this page, is to modify the TLM handbook for this ITQ and make it suitable for other audiences. The audience will determine the needs, for example, the handbook could be modified for younger readers and therefore include more graphical elements and different format and paragraph layouts. The same information can also be used for an adult audience and use more formal writing techniques and layout styles. The candidates could modify the book for staff, which will need a different emphasis and style again. Therefore, this one publication cn be modified in several different ways and use a range of tools and formatting techniques.

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

3.1 I can explain how the information should be formatted to aid meaning
Candidates should be able to demonstrate a clear plan about what they intend to solve by creating various documents and templates.

Evidence: will be provided by candidate's portfolios and assessor observations and feedback.

Additional information and guidance

Candidates need to demonstrate a very good understanding of formatting and why it works or

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doesn't work. They can't employ good techniques if they don't fully understand them. Their plans for what they are going to create need to show examples of documents and publications which demonstrate clearly the way they have helped in conveying th correct meaning. They need to have detailed designs and rough drafts of their intended documents and what aspects of their design are being used to assist their overall impact and meaning. The more detail at the planning stage, the less time wasted at the design and implementation phase, so it is important to show they have spent enough time here. It would be useful for them to gather examples where they feel, and other agree, that the formatting has made the understanding worse. These examples are better at helping candidates understand how to make their own work more effective.

3.2 I can select and use appropriate techniques to format characters and paragraphs
Candidates should be able to demonstrate competence in formatting characters and paragraphs.

Evidence: will be provided by candidate's portfolios and assessor observations and feedback.

Additional information and guidance

Some advanced features used in word processing are for elements such as mathematical documents. It might be useful for candidates to create some documents and guides in other subject areas such as science and mathematics where more complex formatting skills will be required. They might be able to make homework guides for GCSE mathematics of science which will incorporate more complex character formatting, for example in making algebraic equations $10\left(\frac{3x}{5}-\frac{(x+3)}{10}\right)-10(-7)$. In chemistry, they will need to understand and apply subscript and superscript, such as $Fe(NO_3)_2$©. Paragraph formatting helps to make information stand out and be more clear and is often used when inserting quotes into documents. The document might be double spaced to make it easy to read, but the inserted quote might be single spaced, indented and in italics to make it stand out and differentiate it from the main text.

> Passive acceptance of the teacher's wisdom is easy to most boys and girls. It involves no effort of independent thought, and seems rational because the teacher knows more than his pupils; it is moreover the way to win the favour of the teacher unless he is a very exceptional man. Yet the habit of passive acceptance is a disastrous one in later life. It causes man to seek and to accept a leader, and to accept as a leader whoever is established in that position. *[8]*
>
> Bertrand Russell **[9] (1872 - 1970)**

3.3 I can select and use appropriate page and section layouts to present and print multi-page and multi-section documents
Candidates should be able to demonstrate a detailed understanding of formats for output.

Evidence: will be provided by candidate's portfolios and assessor/client observations and feedback.

Additional information and guidance

Part of the overall development of formatting and organising documents is an awareness of how they will be presented. If the ultimate audience is reading from a screen or device, the formatting and layout will be different than if they are printed out. When documents are formatted for ultimate printing, some consideration needs to be made about how the document will read from page to page for clarity. Wherever possible, pages and sections need to be arranged so that they flow easily and do not have broken words and sentences which impede reading ability. Some systems have automatic features to prevent word orphans, but candidates still need to be vigilant to make sure their finished work is clear and free from these flow errors. Id making a book, or other extended document, sometimes the use of page breaks need to be deployed to make sure that new chapters are presented on new pages. Other techniques such as blank pages to make sure that new items appear on the right hand page. Page numbering needs to match. Some books employ roman

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numerals for introduction and table of content pages, and regular numbers for the main text pages. These techniques need to be explored and used where appropriate.

3.4 I can check documents meet needs, using IT tools and making corrections as necessary
Candidates should be able to demonstrate involvement of their clients and vigilance in error correction.

Evidence: will be provided by candidate's portfolios and client observations and feedback.

Additional information and guidance

Candidates need to demonstrate a good use of built in tools like spell and grammar checking tools, but also look to the visual impact of their material. At all stages it would be good to involve the end user to make sure that the document fits their needs and is not just a vehicle to employ some advanced techniques for the sake of it. Some evidence of the process will be important, so candidates need to keep a log or diary of what they developed and what changes were made to maintain the quality and to meet their client's needs.

3.5 I can evaluate the quality of the documents produced to ensure they are fit for purpose
Candidates should be able to demonstrate quality control procedures.

Evidence: will be provided by candidate's work and assessor observations and feedback.

Additional information and guidance

Once the documents are close to final output and delivery, candidates should show some detailed evaluations to show what they have achieved and more importantly, how it meets the needs set out in the early part of this unit. Each document produced should have a clear and concise purpose and the evaluation show be detailed in how close they have come to achieving that purpose. Where they have not met the needs ot the client, they need to be clear about why and how they might fix this in future iterations of the material. It would be good for candidates to list the initial targets and goals and show clear examples in their work of how and why these were met.

3.6 I can respond appropriately to any quality problems with documents to ensure that outcomes meet needs and are fit for purpose
Candidates should be able to demonstrate a professional attitude and response to feedback and criticism given.

Evidence: will be provided by candidate's portfolios and assessor observations and feedback.

Additional information and guidance

Candidates at L3 should be operating at a professional level and should respond in a manner that is suitable for this level. Any feedback and comments received about the work need to be acted on in a timely and professional way and they must always consider the needs and desires of their client first. The customers will ultimately decide if their work is fot for the intended purpose and where it falls short of these, the candidates need to be able to adjust their work to fix these problems.

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.

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Source URL: https://theingots.org/community/sil3u7x

Links
[1] http://theingots.org/community/ITQ_unit_development
[2] https://www.lulu.com/
[3] http://www.theingots.org/community/ITQcourse1
[4] https://theingots.org/community/sites/default/files/uploads/user4/PupilFNC7.pdf
[5] https://help.libreoffice.org/Writer/Shortcut_Keys_for_Writer
[6] https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/15220/formatting-submissions.pdf
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