# e-Quals Unit Syllabus

## Level 2 Using word processing software to adapt and merge documents

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# Unit 022 Using word processing software to adapt and merge documents

Syllabus Overview

**Rationale**

A candidate who successfully completes this unit will be able to use a word processor to create, edit and check common types of documents.

The aim of this unit is to provide candidates with an intermediate level of skills and knowledge to competently prepare for, and perform a variety of *word processing related tasks* using Information and Communication Technologies (ICT). Candidates will develop a more demanding understanding of the word processing application and the operating system in everyday usage and the ability to work in a generally unsupervised role solving issues competently without direction.

**Learning outcomes**

There are **six** outcomes to this unit. The candidate will be able to:

- Plan and prepare to produce new documents
- Produce new documents
- Produce new documents using mail merge facilities
- Edit existing documents
- Check produced documents
- Save and print documents

**Guided learning hours**

It is recommended that 65 hours should be allocated for this unit. This may be on a full time or part time basis.

**Connections with other qualifications**

This unit contributes towards the knowledge and understanding required for the following qualifications:

**IT Users N/SVQ (ITQ) Level 1:**

| Outcome | This unit contributes to the knowledge and understanding of the following elements of N/SVQ(s) | |
|---|---|---|
| 1, 2, 3 | 201 | Make selective use of IT 2 |
| 1, 2, 3, 4 | 202 | Operate a computer 2 |
| 1, 2 | 208 | Word processing software 2 |
| 1, 2, 3, 4 | 212 | Art work and imaging software 2 |
| 1 | 213 | Presentation software 2 |
| 1, 2 | 216 | General uses of IT 2 |
| 1, 2, 3, 4, 5 | 217 | Use IT systems 2 |

**Assessment and grading**

This unit will be assessed by an assignment covering both practical skills and underpinning knowledge.

# Unit 022 Using word processing software to adapt and merge documents

## Outcome 1 Plan and prepare to produce new documents

**Practical activities**
The candidate will be able to:

1 produce draft layouts for different types of document eg business letter, memo, mailshot, report, invoices, itineraries, flyer

2 plan the production of documents and the facilities required eg printer, mailmerge data source, templates, consumables

3 draft suitable positioning and appearance of required text and graphics

4 check the required data is available eg graphics, text, numerical data, data files.

**Underpinning knowledge**
The candidate will be able to:

1 identify common types of documents eg business letters, fax cover sheets, reports, newsletters, promotional material, invoices, itineraries and layouts suitable for each, including page orientation and margins

2 describe how common word processing facilities eg mail merge, templates, tables and styles can be used to produce documents efficiently

3 identify the main paper sizes and state their typical uses

4 state how different styles and sizes of fonts can affect the appearance of a document eg readability, impact, structure

5 state the purpose of text enhancement and when it should be used eg bold, underline, italics, emphasis

6 identify common methods used to structure text eg paragraphs, alignment, line spacing, tabs, indentation, tables, bulleted/numbered lists

7 state how the use and positioning of graphics can be used to improve the appearance of a document using bitmaps eg: tif, jpeg, gif and vector images

8 state the importance of white space.

# Unit 022 Using word processing software to adapt and merge documents

## Outcome 2 Produce new documents

**Practical activities**
The candidate will be able to:

1 start a word processing application with a new blank document or template

2 use templates to produce documents including business letters, memos or reports as required

3 setup page layout for planned documents, eg paper size, orientation, margins, columns, sections

4 create headers and footers for the document, with suitable contents eg auto page numbering

5 input required text with suitable formatting

- a special symbols eg accents, © etc
- b different alignments eg left, right, centre, justified
- c enhancement eg bold, underline, italic or colour
- d tabulation eg tabs, tables
- e font size and style and horizontal spacing
- f paragraphs and indentation
- g bulleted lists
- h numbered lists

6 insert section, column and page breaks as required

7 select and insert objects in suitable positions

- a date, time and filename fields
- b files
- c charts
- d graphics

8 adjust the size/scale of inserted objects

9 copy and paste text from existing documents into new documents

10 insert tables into documents

11 format tables to achieve suitable presentation by

- a positioning
- b adjusting row and column sizes
- c splitting and merging cells
- d applying borders and shading
- e adjusting vertical and horizontal alignment in cells
- f adjusting margins in cells.

**Underpinning knowledge**

The candidate will be able to:

1 identify suitable uses for text enhancement and lines, borders and shading in documents

2 identify the main purposes of using headers and footers, and their contents

3 describe the reasons for using graphical representation of data in documents eg charts and graphs

4 describe the reasons for using date, time and filename fields, and their limitations

5 describe suitable uses for tables in word processed documents

6 state the difference between hard and soft page breaks

7 identify when hard page breaks should be used

8 state the importance of page numbering and page totals eg page X of Y.

# Unit 022 Using word processing software to adapt and merge documents

## Outcome 3 Produce new documents using mail merge facilities

**Practical activities**

The candidate will be able to:

1 plan suitable structures for data files

2 create data files and accurately input the required data

3 create main documents to be used in merges, and link them to data files eg mailshots, labels, visitor badges

4 insert required merge fields into main documents

5 merge documents and preview the results

6 produce merged output to:

- a screen
- b storage
- c printer

7 selectively merge.

**Underpinning knowledge**

The candidate will be able to:

1 describe common uses of mail merge facilities in word processing

2 identify the type of data that should be in the main document of mail merges

3 describe the purpose of data files used in mail merges

4 describe how data files are structured (eg data field, data record, data item)

5 describe problems that might occur during mail merge operations.

# Unit 022 Using word processing software to adapt and merge documents

## Outcome 4 Edit existing documents

**Practical activities**

The candidate will be able to:

1 open existing documents for editing from:
   - a hard disk
   - b removable/portable media
   - c remote (network) location

2 check existing page layouts and change as required eg paper size, orientation, margins, columns, sections, borders, shading

3 edit characters, text blocks and graphics in existing documents by:
   - a selecting (highlighting) and
     - i. inserting and deleting
     - ii. copying and pasting
     - iii. cutting and pasting

4 check existing text formats and change as required eg; alignment; enhancement; line-spacing; tabulation; font size style and horizontal spacing; paragraphs and indentation; bulleted and numbered lists

5 select and use styles to apply multiple changes to text formatting

6 create and apply new styles to achieve suitable presentation

7 modify the positioning and formatting of objects in a document eg charts and graphics eg
   - a grouping and ungrouping
   - b in front of text/other objects
   - c behind text/other objects
   - d send to the back/bring to the back

8 modify section, column and page breaks as required

9 check page numbering and page totals, and modify as required.

**Underpinning knowledge**

The candidate will be able to:

1 describe the advantages and disadvantages of using styles

2 describe the reasons for grouping and ungrouping objects.

# Unit 022 Using word processing software to adapt and merge documents

## Outcome 5 Check produced documents

**Practical activities**

The candidate will be able to:

1 use a spell checker on part and whole documents, and change text as required

2 add new words to the spell checker dictionary as required

3 proof read documents to check:

- a accuracy eg original data has been input accurately
- b correctness eg spelling, names, valid dates
- c meaning eg the sense of the original data has not been changed by editing; the correct forms of words have been used their/there etc, and make changes as required

4 use search and replace to make corrections to whole documents

5 use print preview to check the layout of the finished document and change as required.

**Underpinning knowledge**

The candidate will be able to:

1 explain why it is necessary to add new words to the dictionary of a spell checker

2 identify the limitations of automated spell checkers

3 state the importance of checking documents for accuracy, correctness and meaning

4 state the importance of checking the layout of the finished document in a WYSIWYG display such as print preview.

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## Outcome 6 Save and print documents

**Practical activities**

The candidate will be able to:

1 save documents with suitable filenames in specified locations on:
   a hard disk
   b remote (network) location
   c removable/portable media
2 save page layouts as templates
3 make copies of documents, giving them new names using 'save as…'
4 add paper to the printer as necessary
5 print checked and previewed documents
6 check printed output for accuracy and layout
7 close finished documents and the word processing application.

**Underpinning knowledge**

The candidate will be able to:

1 state the difference between 'save' and 'save as…', and when each should be used
2 state the importance of version control
3 describe the main purposes of templates.

# Unit record sheet

Use this form to track your progress through this unit.

Tick the boxes when you have covered each outcome. When they are all ticked, you are ready to be assessed.

| Outcome | ✓ | Date |
|---|---|---|
| 1 **Plan and prepare to produce new documents** | ☐ | |
| 2 **Produce new documents** | ☐ | |
| 3 **Produce new documents using mail merge facilities** | ☐ | |
| 4 **Edit existing documents** | ☐ | |
| 5 **Check produced documents** | ☐ | |
| 6 **Save and print documents** | ☐ | |

**Candidate Name** ..... **Date** .....

**Candidate Signature** ..... **Date**

**City & Guilds Registration Number** ..... .....

**Assessor Signature** ..... **Date** .....

**Centre Name** ..... **Centre Number** .....

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