e-Quals Unit Syllabus

Level 3 Designing and producing documents and templates

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Unit 042 Designing and producing documents and templates

Syllabus Overview

Rationale

The aim of this unit is to provide candidates with an advanced level of skills and knowledge to competently prepare for, perform or supervise the performance of others in a variety of *word processing related tasks* using Information and Communication Technologies ICT. Candidates will develop a more in depth understanding of the word processing application and the operating system in everyday usage and the ability to work in a supervisory role performing advanced tasks with a high degree of competence, using 'problem solving' skills and giving direction to others.

Learning outcomes

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

- Design and plan new documents and templates
- Produce new documents and templates
- Edit existing documents, recording changes made
- Check produced documents
- Save and print documents

Guided learning hours

It is recommended that 90 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 3

Outcome	Unit	
1, 2, 3	301	Make selective use of IT 3
1, 2, 3, 4	302	Operate a computer 3
1, 2	308	Word processing software 3
1, 2, 3, 4, 5	315	Evaluate the impact of IT 3
1, 2, 3, 4, 5	317	Use IT systems 3

Key Skills

This unit contributes towards the Key Skills in the following areas:

Application of number	
Communication	C 2.2, C 2.3
IT	IT 2.3
Working with others	
Problem solving	PS 2.1, PS 2.2, PS 2.3
Improving own learning	

Assessment and grading

Assessment will be by means of a **set assignment** covering both practical activities and underpinning knowledge.

Unit 042 Designing and producing documents and templates

Outcome 1 Design and plan new documents and templates

Practical activities

The candidate will be able to:

1 produce draft layouts for presenting different types of word processed data:

- a business documents eg letters, memos and reports
- b mail merges eg mailshots, labels, badges
- c templates to meet own or user requirements

2 plan and produce draft designs for text and paragraph styles to achieve suitable presentation

3 prepare data files for mail merge operations using

- a external database source eg a spreadsheet, or dedicated database
- b word processor source

4 produce plans for tables to be included in documents including

- a borders and shading
- b calculation cells

5 produce plans for linked objects to be included in documents including other documents, charts/graphs to allow auto updates.

Underpinning knowledge

The candidate will be able to:

1 describe the main uses of the word processing application, and explain which application based facilities are used for different types of production eg reports, invoices, web pages, mailshots, promotional material

2 explain the purpose of templates in word processing operations and describe their advantages and disadvantages

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

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

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

6 state how the use and positioning of graphics can be used to improve the appearance of a document

7 explain the purpose and importance of white space

8 describe the results of using linked objects in a word processed document.

Unit 042 Designing and producing documents and templates

Outcome 2 Produce new documents and templates

Practical activities

The candidate will be able to:

1 start the word processing application with suitable documents or templates

2 set up the layout of planned documents:

- a margins, paper size, orientation
- b tabs, alignment, paragraph indentation, line-spacing, borders, shading
- c background

3 input required text with suitable formatting:

- a different alignments eg left, right, centre, justified
- b enhancement eg bold, underline, italic
- c tabulation eg left, right centre, decimal, complex tables
- d font size and type
- e paragraphs and indentation
- f bulleted lists
- g numbered lists, including subsets
- h artistic text eg word art
- i special symbols accents, © etc
- j formulae/equations

4 create new documents based upon existing templates

5 create new templates to meet user needs

6 create new text and paragraph styles to prepared designs

7 use file properties to record author and document details eg summary, keywords, statistics etc

8 copy and paste text from existing documents into new documents

9 insert other files into documents in suitable positions

10 select and insert objects in suitable positions:

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

11 Insert and link embedded objects to provide automatic updating of data eg documents, a graph or chart, formula cells of a spreadsheet etc.

Practical activities continued

12 create flowcharts and schematic diagrams using drawing shapes

13 create headers and footer for documents, with suitable contents

14 insert automatic page numberings

15 insert section, column and page breaks as required

16 use an automated facility to add a table of contents to a document

17 use an automated facility to add an index to a document.

Underpinning knowledge

The candidate will be able to:

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

2 explain the reasons for using headers and footers, and their contents

3 describe the reasons for using graphic 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 describe the purpose of using object-linking and embedding in documents

7 state the difference between hard and soft page breaks

8 identify when hard page breaks should be used

9 state the importance of page numbering and page totals eg: page X of Y

10 describe and explain the difference between an index and a table of contents

11 describe the advantages and limitations of using automated index and table of contents facilities.

Unit 042 Designing and producing documents and templates

Outcome 3 Edit existing documents, recording changes made

Practical activities

The candidate will be able to:

1 open existing documents for editing from:
   - a hard disk
   - b removable/portable media
   - c network locations

2 check existing page layouts and change as required

3 edit existing documents by doing the following to characters, text blocks or graphics
   - a selecting highlighting and
     - i inserting and deleting
     - ii copying and pasting
     - ii 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 make suitable changes to a word processor's default document template

6 update document properties to record changes to document details eg keywords, comments

7 use a thesaurus facility to find suitable alternative words for existing text

8 select and use existing styles to standardise text formatting

9 modify the position and format of objects in a document:
   - a grouping and ungrouping
   - b order of display, i.e. in front of or behind other objects or text
   - c relative contrast and brightness eg watermarks, backgrounds
   - d crop and scale to suitable proportions.

10 modify section, column and page breaks as required.

11 check page numbering and page totals, and modify as required

12 after editing changes have been made to a document, update
   - a an automated index
   - b an automated table of contents

13 use change-tracking facilities to record changes made to original drafts of documents

14 use change-tracking facilities to compare different versions of the same document.

Underpinning knowledge

The candidate will be able to:

1 describe when it may be appropriate to make changes to the default document template

2 describe the purpose of a thesaurus giving examples of its use

3 describe the purpose of a change-tracking facility and when it would be used

4 explain why it is important to check the accuracy of automated indexes indices and tables of content.

Unit 042 Designing and producing documents and templates

Outcome 4 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 use a grammar checker to review and make changes to documents

3 proof read documents to check the following and change as required

- 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

4 add British standard (BS) proof reading symbols to documents to indicate changes to be made

5 correctly interpret BS proof reading symbols to edit documents

6 use search and replace to make corrections to whole documents

7 use print preview to check the layout of finished documents and make changes as required.

Underpinning knowledge

The candidate will be able to:

1 describe the limitations of automated spell checkers and the types of errors a spell-checker will not identify

2 identify the limitations of an automatic grammar checker

3 describe how an automatic grammar checker can be used to maintain the written style of a document

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

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

6 identify commonly-used BS proof reading symbols.

Unit 042 Designing and producing documents and templates

Outcome 5 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 removable/portable media
- c network location

2 save templates in suitable locations to make them available to other users

3 save new and modified text and paragraph styles to a suitable location

4 save documents in a format suitable for use as web pages

5 save documents in a format suitable for use as screen displays eg PDFs, interactive word forms

6 print checked and previewed documents

7 check printed output for accuracy and layout

8 close finished documents and the word processing application.

Underpinning knowledge

The candidate will be able to:

1 describe the limitations of using a word processing application to create web pages

2 identify suitable locations for saving 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 **Design and plan new documents and templates**	☐	
2 **Produce new documents and templates**	☐	
3 **Edit existing documents, recording changes made**	☐	
4 **Check produced documents**	☐	
5 **Save and print documents**	☐	

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

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

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

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