SQA Advanced Unit Specification

General information for centres

Unit title: IT in Business: Advanced Word Processing (SCQF level 8)

Unit code: HP0N 48

Superclass:	CC
Publication date:	August 2017
Source:	Scottish Qualifications Authority
Version:	01

Unit purpose

This unit is designed to allow learners to develop and apply advanced word processing skills to assist in the production of business related documents. Learners will be required to solve problems and make decisions relevant to a working environment. The unit would be suitable for learners wishing to gain advanced skills in document management and processing.

Outcomes

On successful completion of the unit the learner will be able to:

1   Evaluate existing document processing procedures and explain the importance of an organisational house style.
2   Create pro forma documents and macros to meet an organisational house style.
3   Perform an advanced mail merge.
4   Apply advanced word processing skills to produce business documents to an organisational house style.

Credit points and level

1 SQA credit at SCQF level 8: (8 SCQF credit points at SCQF level 8)

Recommended entry to the unit

Access to this unit is at the discretion of the centre. However it would be beneficial if learners have achieved the unit HP6G 47 *IT in Business: Word Processing and Presentation Applications* or equivalent, or relevant work experience.

Core Skills

Opportunities to develop aspects of Core Skills are highlighted in the Support Notes for this unit specification.

There is no automatic certification of Core Skills or Core Skill components in this unit.

Context for delivery

If this unit is delivered as part of a Group Award, it is recommended that it should be taught and assessed within the subject area of the Group Award to which it contributes.

The Assessment Support Pack (ASP) for this unit provides assessment and marking guidelines that exemplify the national standard for achievement. It is a valid, reliable and practicable assessment. Centres wishing to develop their own assessments should refer to the ASP to ensure a comparable standard. A list of existing ASPs is available to download from SQA's website **(http://www.sqa.org.uk/sqa/46233.2769.html)**.

Equality and inclusion

This unit specification has been designed to ensure that there are no unnecessary barriers to learning or assessment. The individual needs of learners should be taken into account when planning learning experiences, selecting assessment methods or considering alternative evidence.

Further advice can be found on our website **www.sqa.org.uk/assessmentarrangements**.

Unit specification: statement of standards

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Acceptable performance in this unit will be the satisfactory achievement of the standards set out in this part of the unit specification. All sections of the statement of standards are mandatory and cannot be altered without reference to SQA.

Where evidence for Outcomes is assessed on a sample basis, the whole of the content listed in the Knowledge and/or Skills section must be taught and available for assessment. Learners should not know in advance the items on which they will be assessed and different items should be sampled on each assessment occasion.

Outcome 1

Evaluate existing document processing procedures and explain the importance of an organisational house style.

Knowledge and/or Skills
♦   Business documents
♦   Evaluation techniques
♦   House style
♦   Mailable copy

Outcome 2

Create pro forma documents and macros to meet an organisational house style.

Knowledge and/or Skills
♦   Templates
♦   Macros
♦   E-form

Outcome 3

Perform an advanced mail merge.

Knowledge and/or Skills
♦   Document composition
♦   Data sources
♦   Mail merge rules
♦   Filters

Outcome 4

Apply advanced word processing skills to produce business documents to an organisational house style.

Knowledge and/or Skills
♦   Layout and features
♦   Graphics and objects
♦   Referencing
♦   Track changes

Evidence requirements for this unit

Learners will need to provide evidence to demonstrate their Knowledge and/or Skills across all Outcomes by showing that they can:

♦ evaluate existing document processing procedures.
♦ recommend and explain improvements to an existing organisational house style.
♦ define an acceptable mailable copy standard.
♦ provide examples of new templates and macros for two business documents to meet the new house style.
♦ explain the utility of house style, templates and macros in terms of corporate image, reputation, productivity, efficiency, quality and professionalism.

♦ create two templates for business documents.
♦ create a macro.
♦ create an e-form for a specific purpose using three of the following features: checkbox form field, drop down form field, customised text form field, form help text, advanced table features.

♦ compose a mail merge document from incomplete information containing eight fields from another data source.
♦ select and use information from two data sources one from a different software application and one from another source.
♦ specify one mail merge rule to add decision-making ability to mail merge.
♦ create merge documents meeting one rule criterion for six recipients.

♦ use layout and appearance features — paragraphing, breaks, customised headers and footers for different parts of a long document, automated multi-level numbering.
♦ format text using dropped capitals, date and time boxes, signature lines.
♦ customise columns, including customised column/spacing width settings, with/without line separator, for part of a document.
♦ insert an illustration.
♦ insert an object, examples include organisation chart, textbox, drawings.
♦ use referencing features correctly — one occurrence of a bookmark and one occurrence of a cross-reference.
♦ use the style function — create one customised style and apply using three of the following formatting options: font, paragraphing, borders, tabs, shortcut key.
♦ create a table of contents — multi-level — to two levels.
♦ use track changes and comments as appropriate — at least one instance of each.

Unit specification: support notes

Unit title: IT in Business: Advanced Word Processing (SCQF level 8)

Unit Support Notes are offered as guidance and are not mandatory.

While the exact time allocated to this unit is at the discretion of the centre, the notional design length is 40 hours.

Guidance on the content and context for this unit

This unit is designed to provide learners with the knowledge and skills for further study or employment in an administrative environment. It may form part of a group award or be completed as a free-standing Unit.

This unit is designed to develop the technical and administrative knowledge relevant to current administrative practice and prepare learners for employment in an administrative role, for example Office Manager or Administrator. Learners should therefore be introduced to a variety of up to date office software and examples of industry standard office procedures and practices. Learners should also develop an awareness of professional issues such as legal, data management and ethical considerations during development and creation of business documents.

Learners should develop in-depth technical skills to facilitate a high level of competence in the component functions of the word processing programme. This unit should also develop critical and evaluative thinking. Learners should be able to critically evaluate existing business documentation, synthesise ideas, concepts and issues to allow the generation and presentation of information into professional documents.

Most organisations will have a preferred house style and learners should be introduced to this concept. An appropriate house style should be agreed between the assessor and learner. Where learners hold an appropriate job role, their employer's house style may be used if agreed with the assessor. Learners should recommend and justify improvements to an existing organisational house style taking into account corporate image, reputation, productivity, efficiency, quality and professionalism, and acceptable, mailable copy.

Guidance on approaches to delivery of this unit

There are links between this unit and other mandatory units within the SQA Advanced Diploma in Administration and Information Technology Group Award (GM68 48). Some examples are suggested but they are not exhaustive.

Knowledge and Skills developed in the unit HP75 48 *Communication: Business Communication* may assist learners in the development of formal business documents for Outcome 1 and provide the underpinning knowledge to structure information effectively to a prescribed business format.

The knowledge gained in Outcome 1 of this unit can support the underpinning knowledge required for Outcome 1 in the unit HP6A 48 *Office Management*.

As learners progress it is advisable that they are made aware that topic areas covered are available for sample within HP6J 48 *Administration and Information Technology: Graded unit 2* and HP6K 48 *Administration and Information Technology: Graded unit 3*. Learners should consider the different circumstances in which they would use advanced word processing features and identify relevant business examples to support revision for *Graded unit 2*. The skills developed in evaluating existing business documentation and overcome existing document management problems by developing new standards and procedures will support part of the underpinning knowledge required for *Graded unit 3*.

Outcome 1

Learners should develop skills in evaluating existing documentation in order to create, edit and improve document management within the organisation as stated in Evidence Requirements. The assessment for Outcome 1 may be based on a real-workplace scenario where agreed with the lecturer and learner. If centres wish to direct learners to specific documents for analysis then these documents may be used in the given scenario provided for document production in Outcomes 2, 3 and 4.

Throughout the teaching of this unit learners can be encouraged to develop an awareness of professional issues such as legal, data management and ethical considerations in relation to the generation of standard documents. For example, in creating a standard form to hold personal data, learners should be encouraged to consider the legal and ethical implications of storing this data.

Where learners have not achieved the unit HP6G 47 *IT in Business: Word Processing and Presentation Applications*, or equivalent, centres are encouraged to identify appropriate pre-course preparation. For example, learners could be provided with examples of house style documents, including examples of the business documents they are most likely to encounter.

Learners are asked to define an acceptable mailable copy standard and agree house style standards with the assessor and therefore may be encouraged to research house style standards in use in industry by undertaking some research in this area.

Learners can also be encouraged to research examples of good practice in the design of standard forms and the legal, data management and ethical considerations in relation to the generation of these forms.

Where research has been undertaken learners could also be encouraged to seek out their own sources which could be referenced in any submission.

The standard documents created in Outcome 2 can be used as examples of new templates and macros required for Outcome 1.

Outcome 2

Learners are required to create two templates and a macro for Outcome 2 which can be used as evidence for the standard documents required for Outcome 1. The generation of these templates and macro can also assist in the production of documents for Outcomes 3 and 4. For example a letterhead template may be generated which will assist in the production of the letter for Outcome 3. A macro may be generated to insert and format a logo and signature line for the letter for Outcome 3. A macro may also be generated to combine multiple commands for Outcome 4, for example, the insertion and formatting of an object or the insertion of a table with a specific size and borders with a specific number of rows and columns.

Learners are required to create a macro. Access to this macro can be either assigning it to a custom button on a toolbar, using a menu or keyboard shortcut. Centres are encouraged to make students aware of the features available to share macros globally and between specific documents. This may include the Macro Organiser that allows users to copy macros between specific documents, delete and rename macros.

Learners are required to create an e-form for a specific purpose incorporating three of the following features: checkbox form field, drop down form field, customised text form field, form help text and advanced table features. A customised text form field may involve learners making use of the 'Type' function (regular text, number, date, current date, current time, calculation), and customising this option in terms of format and length of field. Advanced table features may include customised borders and shading, merged cells, text direction options and vertical and horizontal alignment within cells.

Outcome 3

Learners are required to compose a letter from given information as per Evidence Requirements and use a data source from a different application to complete the mail merge. This information is not wholly complete requiring learners to source additional information. For example, if the given scenario is based on a travel agency firm, learners could be asked to source up to date flight details to send to a customer. Learners could use the internet to source this data. In composing the letter, learners may be encouraged to check that the correct meaning and tone of the response is accurately conveyed by the language and grammar used. Centres may check that spelling, grammar and punctuation is consistent and in accordance with organisational house style. Centres may encourage learners to be self-correcting and proofreading skills can be emphasised. Tracking changes between draft and final submission exemplifies proof reading and provides evidence of the track changes feature.

As stated in Evidence Requirements, learners are required to make use of the mail merge word field to add decision-making ability to the mail merge. For example the 'If…Then…Else' field will allow learners to insert additional text based on the contents of a field. The words 'he' or 'she', for example, may be substituted depending on the field containing the title 'Ms' or 'Mr' in the recipient list.

It is anticipated that the mail merge data source will be from another application such as a database, spreadsheet or address book. Learners are not required to print, however centres are encouraged to direct learners to the available envelope print options.

Editing the data source may include the following: add a recipient, delete a recipient, add an additional field, delete a field, amend a field, sorting the recipient list in a specified order, or filtering on more than one field, but other examples could be acceptable.

Outcome 4

Learners may be given an existing document that requires amendment and inclusion of the Knowledge and/or Skills for Outcome 4. If centres wish to direct learners to specific documents for amendment then these documents may be used in the given scenario provided for document production in Outcomes 1, 2 and 3.

Alternatively, if learners are creating a report for Outcome 1, this document may be used for Outcome 4.

Learners can be encouraged to take a positive attitude towards the quality of their own work and be self-correcting. Tracking changes between draft and final submission exemplifies proof reading and provides evidence of the track changes feature.

When creating styles learners may be made aware that new styles can be added to the standard document template so that they are available to all documents. Learners may also create standardised styles to be used as a template within the customised house style required for Outcome 1.

Learners are required to make appropriate use of three illustrations as stated in Evidence Requirements. Illustrations may include clip art, pictures from any source, shapes, customised/created art or diagrams, however, this list is not exhaustive.

The following examples of objects may be used: organisation chart, textbox, drawings; although this list is not exhaustive.

Evidence of documents created in Outcome 4 may be assessed from an electronic format. This would allow the assessor to ensure use of automated features such as bookmarks, cross references, and the use of e-form field options. Assessing documents electronically provides centres with the option of assessment via electronic e-portfolios.

Learners are not required to print, however centres are encouraged to direct learners to the range of available advanced print features. For example, in the 'Print What' options: document properties, document showing mark-up, list of mark-up, styles, and in the 'Print Options': Draft Output, Update Fields, Print Data Only for forms.

Guidance on approaches to assessment of this unit

Evidence can be generated using different types of assessment. The following are suggestions only. There may be other methods that would be more suitable to learners.

Evidence can be generated through assessment of a given case study or a real work place situation. Where a case study is created, realistic documentation should be used throughout and a thematic approach adopted across all Outcomes. Outcomes 1, 2, 3 and 4 may be assessed together. The standard documents created in Outcome 2 can be used as examples of new templates and macros for Outcome 1 and assist in the production of documents in Outcome 3 and 4. There may be opportunities to assess this Outcome using a VLE, hard copy or electronic copies, where appropriate. There is no compulsory time element for each Outcome. There must be arrangements in place to ensure the authenticity of work produced.

Centres are reminded that prior verification of centre-devised assessments would help to ensure that the national standard is being met. Where learners experience a range of assessment methods, this helps them to develop different skills that should be transferable to work or further and higher education.

Opportunities for e-assessment

E-assessment may be appropriate for some assessments in this unit. By e-assessment we mean assessment which is supported by Information and Communication Technology (ICT), such as e-testing or the use of e-portfolios or social software. Centres which wish to use e-assessment must ensure that the national standard is applied to all learner evidence and that conditions of assessment as specified in the Evidence Requirements are met, regardless of the mode of gathering evidence. The most up-to-date guidance on the use of e-assessment to support SQA's qualifications is available at **www.sqa.org.uk/e-assessment**.

Opportunities for developing Core and other essential skills

There are also opportunities in this unit to develop aspects of the Core Skill components Planning and Organising at SCQF level 6, Accessing Information at SCQF level 6, and Written Communication at SCQF level 5, and these are highlighted in the Support Notes of this unit specification.

Administrative information

History of changes to unit

Version	Description of change	Date

SQA acknowledges the valuable contribution that Scotland's colleges have made to the development of SQA Advanced Qualifications.

FURTHER INFORMATION: Call SQA's Customer Contact Centre on 44 (0) 141 500 5030 or 0345 279 1000. Alternatively, complete our Centre Feedback Form.

General information for candidates

Unit title: IT in Business: Advanced Word Processing (SCQF level 8)

This section will help you decide whether this is the unit for you by explaining what the unit is about, what you should know or be able to do before you start, what you will need to do during the unit and opportunities for further learning and employment.

This unit is designed to increase your competence in using the advanced features of a word processing application. The unit will also develop critical and evaluative thinking skills to problem solve in today's modern office environment. This means that you will develop the skills to assess the suitability of existing business documents and then redesign and present these documents to meet business requirements. These documents will be created to meet an agreed organisational house style.

During the course of the unit you will also develop advanced word processing skills that will allow you to create a range of professional business documents. This will include word processing features such as advanced formatting and document layouts, e-forms, templates, graphics and macros. You will also develop the skills to allow you to write responses to business correspondence and use advanced mail merge features to support decision making.

As you will be required to produce word processing documents that are at an advanced level it would be beneficial if you are able to use the more basic levels of the word processing application before you start this unit. Some pre-course preparation may be provided by the centre.

When you are assessed in this unit, it will be through a business problem. You will be asked to design and agree an organisational house style and then create a range of professional business documents based on this house style, including templates and macros. You will also be asked to explain the use of the house style, templates and macros in terms of corporate image, reputation, productivity, efficiency, quality and professionalism.