

TEXT PROCESSING (BUSINESS PROFESSIONAL)

Mailmerge

Level: 2
Credits: 5
Learning Time: 50 hours

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
1 Use a word processor and/or database/ spreadsheet software or integrated package efficiently	1.1 Create, maintain and print datafiles and labels. Print selected standard documents and labels using merge facilities	<ul style="list-style-type: none"> Set top and left margins of at least 13 mm (except datafiles and labels which may be less than 13mm) Emphasise text by use of underlining, bold or italics Use full justification if requested
2 Enter and format text from handwritten drafts	2.1 Produce text accurately and efficiently from drafts	<ul style="list-style-type: none"> Plan and organise work within deadlines Read and transcribe variable quality manuscript Plan layout of work in a variety of formats Accurately key in text from handwritten drafts Follow capitalisation of draft material Interpret written instructions Use consistent style and format of presentation with at least one clear linespace before and after separate items within a document Use appropriate stationery (ie plain A4 paper) Check accuracy of amendments and that all instructions have been carried out correctly Proofread and correct errors to ensure work

		is 100% accurate
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<p>3 Produce two business documents, amend one datafile, produce labels and create one datafile in the time allowed</p>	<p>3.1 Key in and print a business letter from handwritten draft, incorporating variable merge codes.</p>	<ul style="list-style-type: none"> • Use conventional layout and style of a business letter • Insert today's date on letter • Use OCR-supplied letterhead template • Key in <i>Our ref</i> details as shown in draft, including capitalisation • Insert a subject heading, if indicated in the draft • Indicate Enc(s) as displayed on draft
	<p>3.2 Key in and print a further business document from handwritten draft, incorporating variable merge codes</p>	<ul style="list-style-type: none"> • Use conventional layout and style of a variety of business documents • Insert today's date where appropriate
	<p>3.3 Access datafiles as instructed and carry out amendments as indicated, including sorting records</p>	<ul style="list-style-type: none"> • Delete, add and amend records • Insert additional field • Sort records into alphabetical or numerical order within specified field
	<p>3.4 Accurately create datafile to store variable information as instructed</p>	<ul style="list-style-type: none"> • Create fields and add records, ensuring that records are accurate and complete
	<p>3.5 Save and print datafiles as instructed</p>	<ul style="list-style-type: none"> • Print, ensuring that all fields and records are displayed in full
	<p>3.6 Produce and print standard documents as instructed with variable merge codes</p>	<ul style="list-style-type: none"> • Insert merge codes • Print standard documents displaying appropriate merge codes
	<p>3.7 Print selected documents using merge selection on one criterion</p>	<ul style="list-style-type: none"> • Use merge selection facility on one criterion to print documents for selected records only
	<p>3.8 Print selected documents using merge selection on two criteria</p>	<ul style="list-style-type: none"> • Use merge selection facility on two criteria to print documents for selected records only
	<p>3.9 Create, save and print</p>	<ul style="list-style-type: none"> • Using existing merge

	selected labels using merge selection on one criterion	selection on one criterion, create and print labels in sheet style
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Unit aim

This unit aims to equip candidates with the ability to create, amend and print datafiles and standard documents and print selected merged documents and labels using merge facilities.

Assessment

Assessment will consist of producing two business documents, an amended and created datafile and production of merged documents and labels using one and two criteria and will take the form of a 1 hour 30 minute test set and marked by OCR – total words 925.

Results will be graded Distinction, Pass or Fail.

To achieve a Distinction, candidates must produce the documents with no more than 3 faults within the time allowed (1 hour 15 minutes)

To achieve a Pass, candidates must produce the documents with no more than 7 faults within the time allowed (1 hour 30 minutes)

The grade achieved will be stated on the certificate.

Administration guidance

- Candidates may use word processing and/or database/spreadsheet software, or integrated packages for this examination.
- Centres must ensure that the recall material for this examination is available for candidates. A datafile, which will be recalled by the candidates is supplied by OCR on CD-ROM or can be downloaded from Interchange, OCR's secure website. This datafile will be used for a number of different examinations. Centres must ensure that the datafile is saved as instructed and it is the Centre's responsibility to ensure that this is prepared for use by their own candidates. A printed copy of the datafile used must be submitted with the candidate's work. This may be displayed in any format applicable to the software used.
- Stationery: A4 plain paper will be required. Label stationery may be used or substituted by one sheet of A4 plain paper.
- Printing: Candidates **must** carry out their own printing. Labels can be printed on label stationery or on one sheet of A4 plain paper. Candidates must submit all their work produced in the examination room. Printing may be undertaken outside the 1 hour allowed for this unit in a period immediately following the examination and supervised by the invigilator.
- For further information regarding administration for this qualification, please refer to the OCR document '*Administrative Guide for Vocational Qualifications*' (A850).

Guidance on assessment and evidence requirements

Candidates must produce two business documents, a sheet of labels and two datafiles to a standard acceptable in the workplace and outcomes must be within the permitted error tolerance.

Penalties are given for errors and the same fault appearing more than once will incur a penalty each time. One fault only will be given to any one word* irrespective of the number of errors that may appear in that word. For example, “miscellaneous” keyed in as “miss-selanium” will be penalised 1 fault, even though several faults have been incurred in the word.

* A word is defined as any normally recognisable word including a hyphenated word and associated punctuation and spacing. Other items that are treated as a word are:

- postcode
- initials and courtesy titles
- simple or complex numbers including money, times and telephone numbers
- simple or compound measurements

You should refer to the ‘OCR Administrative Guide to Vocational Qualifications (A850)’ for Notes on Preventing Computer-Assisted Malpractice.

Errors will be divided into 4 categories:

Marking Criteria	Tutor Notes
Section 1 Faults – keying in errors One fault will be given for each word* which:	
1.1 contains a character which is incorrect (including upper case character within a word), or is illegible for any reason	<ul style="list-style-type: none"> • A penalty will be incurred for any word that contains a character that is incorrect or that includes an upper case character within a word, eg <i>LaBel</i> • Candidates may use English and mother tongue dictionaries and spellcheckers where available
1.2 has omitted or additional characters or spaces (including omissions caused by faulty use of correction techniques)	<ul style="list-style-type: none"> • A space inserted between a word and its associated punctuation, eg <i>word :</i> or <i>word ?</i> will incur 1 fault per instance • Incorrect or omitted paired punctuation eg brackets, single quotes will incur 1 fault per ‘pair’, eg (Progress Group), ‘ Progress Group ’
1.3 contains handwritten character(s)	
1.4 has no space following it	
1.5 has more than 2 character spaces following it, except where appropriate, eg before postcode, after punctuation	In continuous text, 1 fault per instance will be incurred for: <ul style="list-style-type: none"> • More than 3 spaces appearing after a full stop, question mark, exclamation mark or colon • More than 2 spaces appearing after a comma, semi-colon, closing bracket, dash, apostrophe (at the end of a word) and closing single or double quotes • Where a short line appears, this will be penalised if the first word following could have fitted at the end of the short line with at least

	18 mm ($\frac{3}{4}$ ") to spare (measuring the short line against the longest line in the document)
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1.6 contains overtyping, including overtyping of pre-printed material (per entry regardless of the number of words involved) eg text cutting through letterhead template	
1.7 does not contain initial capitals as presented in the draft, including the first letter of a sentence	<ul style="list-style-type: none"> • Candidates should key in text as presented in the draft. Initial capitals in the draft are those that are required for grammatical reasons. 1 fault per instance will be incurred for each initial capital drafted that has been keyed in as a lower case character • Failure to insert a capital letter following a penalty for an omitted full stop will not be penalised. Likewise, inserting a capital letter following a penalty for an incorrect full stop will not be penalised

Section 2 Faults – omissions and additions

One fault will be given for each instance of:

2.1 each word which is the wrong word and a word that has been omitted or added or not removed as instructed (eg a word which is crossed out in the draft)	<p>Letters</p> <ul style="list-style-type: none"> • Candidates will incur a fault if they set up their own reference (not as draft) • The reference, and name and address may be presented in any order but must appear above the salutation and must be keyed in as draft, including capitalisation • Any style of date is acceptable, with the exception of the American numerical format, eg 12/25/2007 as Christmas Day • Dates should appear below the letterhead and above the salutation of the letter and should have a clear linespace above/below • Dates will not be acceptable in the header/footer details alone • One fault will be incurred for each instance of a missing, incomplete or incorrect date to be inserted on correspondence as instructed on the front cover of the question paper • All errors in other dates are penalised per element • Where postdating is required, one fault maximum will be incurred for any errors or omissions • If a date appears in a document that does not require dating, this will be penalised 1 fault max unless the date appears as part of the personal details or above the first line of the document or below the last line of the document
2.2 failure to produce a standard document where merged documents have been printed	

2.3	each merged field not correctly identified in the standard document	
2.4	each instance of merged data from a requested printed document	<ul style="list-style-type: none"> To a maximum of 4 faults per missing document
2.5	failure to delete a record as instructed	<ul style="list-style-type: none"> Failure to delete a record as instructed, or to delete a record in its entirety, will incur 1 fault per record
2.6	incorrectly deleting and/or duplication of a record	<ul style="list-style-type: none"> Incorrect deletion and/or duplication of a recalled record incurs 1 fault per record
2.7	a printout of an unrequested merged document	

Section 3 Faults - transpositions and misplacements

One fault will be given for each instance of:

3.1	not applicable to this unit	
3.2	words that are misplaced within text, where there is no instruction	<ul style="list-style-type: none"> Each instance of misplaced item of variable information will be penalised (on standard document only)
3.3	failure to indicate a paragraph as per draft	
3.4	not applicable to this unit	
3.5	not applicable to this unit	
3.6	not applicable to this unit	
3.7	a datafile not sorted as instructed	<ul style="list-style-type: none"> Datafile not sorted correctly on specified field will incur 1 fault

Section 4 Faults – presentation

No more than one fault per paper for each of the following items:

4A	left and/or top margins of less than 13 mm, or ragged left margin	<p>This includes:</p> <ul style="list-style-type: none"> Ragged left margin, eg additional character spacing at the beginning of a paragraph Headings not keyed in at the left margin, as presented in draft (Datafiles are exempt from this requirement)
4B	no clear linespace before and after separate items within a document	<ul style="list-style-type: none"> Failure to leave a clear linespace before and after separate items within a document, eg before/after headings or between paragraphs
4C	not applicable to this unit	
4D	failure to emphasise text as instructed	<p>This includes:</p> <ul style="list-style-type: none"> Emphasis extended beyond the required portion Additional emphasis of text where not requested (except for headings – see 4J below). Emphasise using bold, italics or underlining.
4E	not applicable to this unit	
4F	not applicable to this unit	

4G	invigilators should report any machine problems resulting in smudged work	
4H	incorrect stationery used (ie merged letters must be printed on letterheads, datafiles on A4 plain paper, portrait or landscape)	<ul style="list-style-type: none"> • Merged labels should be printed on one sheet of A4 paper except where label stationery is used.
4I	inconsistent spacing between and within similar items within a document	<ul style="list-style-type: none"> • Inconsistent spacing (including linespacing) between and within similar items is only penalised if a comparison with a similar item can be made within the same document
4J	<ul style="list-style-type: none"> - use of initial capitals where not presented in draft, or - block capitals used where not presented in draft, or - failure to use block capitals as presented in draft, or - failure to key in headings with initial capitals and underlined as presented in draft 	<p>This includes:</p> <ul style="list-style-type: none"> • Inappropriate use of initial capitals where initial capitals were not presented in draft, eg <i>Sincerely</i> in complimentary close. • Block capitals used where not presented in draft, eg <i>WHITE</i> instead of <i>White</i>. • Failure to use block capitals as presented in draft, eg <i>DISEASES</i> keyed in as <i>Diseases</i>. • Failure to underline headings, including subheadings, as presented in the draft, eg "<u>Miscellaneous Household Items</u>" keyed in as "Miscellaneous Household Items" • Capitalisation faults in postcodes and references • Candidates should key in data exactly as shown in the draft but additional boldening, italicising or underlining of headings will not be penalised
4K	inconsistent use of alternative spellings within a document	<ul style="list-style-type: none"> • Alternative spellings found in an English dictionary will be accepted but will incur a fault if used inconsistently, eg <i>organize</i> but <i>organisation</i> within the same document
4L	inconsistent display of dates, measurements, weights, times, money, figures, dashes/hyphens within a document	<ul style="list-style-type: none"> • Dates must be of consistent style throughout a document. For example, if full style is used such as <i>12 January 2098</i>, this style should be used for all subsequent dates within the same document. (Please also refer to Section 2.1 Notes above.) • Measurements and weights must be used consistently. For example, <i>5 cm</i> or <i>5cm</i>; <i>16 kg</i> or <i>16kg</i> • Times should be keyed in as shown in the draft, for example, <i>9.30 am</i>. Candidates should not change times from 12-hour clock to 24-hour clock or vice versa, unless instructed to do so • Money: there must be no character space between £ and the amount, eg <i>£60</i>. In columns and tables accept spacing between £ and amount • The display of figures should be an

	“acceptable system”, eg
	<ul style="list-style-type: none"> - all figures including “1” - all words (but use of words such as <i>twenty-five</i> or <i>twenty five</i> must be consistent) - <i>one</i> as a word, all others as figures - <i>one</i> to <i>nine</i> or <i>ten</i> as words and then <i>10</i> or <i>11</i> upwards as figures - <i>one</i> to <i>twenty</i> as words and then <i>21</i> upwards as figures • Where dashes or hyphens are used to represent the word “to” (eg <i>15-22</i> or <i>15 – 22</i>) these must be used consistently throughout a document
4M inconsistent use of open or full punctuation within a document	<p>This includes:</p> <ul style="list-style-type: none"> • A full stop appearing in any abbreviation such as <i>enc</i>, <i>cc</i>, <i>eg</i>, <i>am</i>, when open punctuation has been used • A missing full stop in any abbreviation such as <i>enc.</i>, <i>c.c.</i> <i>e.g.</i>, <i>a.m.</i>, where full punctuation has been used
4N insertion of an additional comma which alters the meaning of a sentence	<ul style="list-style-type: none"> • Candidates should key in punctuation as presented in the draft. However, the insertion of an additional comma will only be penalised if this alters the meaning of the sentence