



# Text Processing (Business Professional)

<b>Unit Title:</b>	<b>Mailmerge</b>
OCR unit number:	06994
Level:	2
Credit value:	5
Guided learning hours:	50
Unit reference number:	F/505/7091

## Unit aim

This unit aims to equip candidates with the ability to create, amend and print data files and standard documents and print selected merged documents and labels using merge facilities, to a standard that meets the requirements of employment.

<b>Learning Outcomes</b> <i>The learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, understanding and skills</b>
1 Be able to use a word processor	1.1 Use the functions of a word processor, including <ul style="list-style-type: none"> <li>- setting and adjusting margins</li> <li>- alignment including full justification</li> <li>- ways of emphasising text</li> <li>- sorting data</li> <li>- open files</li> <li>- saving files</li> <li>- printing</li> </ul>	<ul style="list-style-type: none"> <li>• Set margins of at least 13 mm (except labels which may be less than 13 mm)</li> <li>• Retrieve pre-stored documents</li> <li>• Emphasise text, using bold, italics or underlining only</li> <li>• Use full justification</li> <li>• Produce printouts ensuring all fields and records are displayed in full:               <ul style="list-style-type: none"> <li>- print data files</li> <li>- print business documents and labels displaying variable merge fields</li> <li>- print selected documents using merge selection on two criterion</li> </ul> </li> </ul>
2 Be able to key in text from handwritten drafts	2.1 Key in text, including <ul style="list-style-type: none"> <li>- capitalisation</li> <li>- punctuation</li> </ul>	<ul style="list-style-type: none"> <li>• Read and transcribe variable quality manuscript</li> <li>• English spelling, punctuation and grammar</li> </ul>
	2.2 Key in text to produce business documents including: <ul style="list-style-type: none"> <li>- a business letter</li> <li>- standard business documents</li> <li>- edit a data file</li> <li>- create a data file</li> </ul> 2.3 Key in a data file to store variable information	<ul style="list-style-type: none"> <li>• Use conventional layout and style for business documents</li> <li>• Create a data file containing fields to store variable information</li> <li>• Add records and additional field to a data file</li> <li>• Follow capitalisation of draft material</li> <li>• Headings to be keyed at the left margin, as presented in draft (with the exception of data files)</li> </ul>

<b>Learning Outcomes</b> <i>The learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, understanding and skills</b>
		<ul style="list-style-type: none"> <li>• <b>Letter</b> <ul style="list-style-type: none"> <li>- <i>Our ref</i> details keyed in as draft, including capitalisation and punctuation</li> </ul> </li> </ul>
<p>3 Be able to interpret implied and explicit instructions</p>	<p>3.1 Complete work within set timescales</p> <p>3.2 Select stationery appropriate for document type</p> <p>3.3 Use consistent style and presentation, including</p> <ul style="list-style-type: none"> <li>- clear line space before and after separate items in documents</li> <li>- display of date, measurement, weight, time, money, figures, dashes and hyphens</li> </ul> <p>3.4 Comply with instructions for production of letters, including</p> <ul style="list-style-type: none"> <li>- inserting today's date</li> <li>- inserting a subject heading</li> <li>- indicating enclosure(s)</li> </ul> <p>3.5 Retrieve a stored data file and make amendments</p>	<ul style="list-style-type: none"> <li>• Use appropriate stationery or templates</li> <li>• Retrieve pre-stored data file or templates</li> </ul> <ul style="list-style-type: none"> <li>• <b>Letter</b> <ul style="list-style-type: none"> <li>- Insert today's date</li> <li>- Insert a subject heading, if presented in the draft</li> <li>- Indicate enclosure(s) if presented in the draft</li> </ul> </li> <li>• Add, delete and amend records</li> <li>• Insert an additional field</li> <li>• Sort records into alphabetical or numerical order within specified field</li> </ul>
<p>4 Be able to merge documents and labels with a data file</p>	<p>4.1 Create and maintain data files</p> <p>4.2 Use Mailmerge functions to produce standard business documents and labels, including:</p> <ul style="list-style-type: none"> <li>- inserting variable merge codes</li> <li>- linking a data file</li> <li>- setting merge criteria</li> <li>- merging a standard document with a data file using one selection criteria</li> <li>- merging a standard document with a data file using two selection criteria</li> </ul>	<ul style="list-style-type: none"> <li>• Use merge selection facility on two criteria to create documents for selected records only</li> <li>• Using existing merge selection on one criterion, create labels in sheet style</li> </ul>

<b>Learning Outcomes</b> <i>The learner will:</i>	<b>Assessment Criteria</b> <i>The learner can:</i>	<b>Knowledge, understanding and skills</b>
5 Be able to check documents for accuracy	5.1 Check documents for accuracy, correcting mistakes as necessary	<ul style="list-style-type: none"> <li>• Use of spellchecker</li> <li>• English spelling, punctuation and grammar</li> <li>• Proofreading skills</li> <li>• Use appropriate correction techniques to ensure work is accurate</li> </ul>

## Assessment

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Assessment will consist of producing two business documents, a stored datafile for amendments, a 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. The grade achieved will be stated on the certificate.

To achieve a Distinction, candidates must produce the documents with no more than 3 faults within the time allowed (1 hour 30 minutes).

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

## Administration guidance

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- 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 publications on CD-ROM or can be downloaded free of charge from Interchange, OCR's secure website. 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. 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. Candidates must use the templates supplied by OCR for the examination.
- 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 30 minutes 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 '*Admin Guide: Vocational Qualifications' (A850)* on the OCR website [www.ocr.org.uk](http://www.ocr.org.uk).

## Guidance on assessment and evidence requirements

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For detailed guidance, please refer to the marking criteria and tutor notes in this document.

Candidates must produce two business documents and two datafiles, 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. Presentation (Section 4) faults may also be applied.

\* 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.

Invigilators are given clear instructions to report any problems with printers, failure to do so can disadvantage candidates.

Errors will be divided into 4 categories:

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Marking Criteria	Tutor Notes
<b>Section 1 Faults – keying in errors</b> <b>One fault will be given for each word* which:</b>	
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"><li>• 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, e.g. <i>LaBeI</i></li><li>• Candidates may use English and mother tongue dictionaries and spellcheckers where available</li></ul>
1.2 has omitted or additional characters or spaces (including omissions caused by faulty use of correction techniques)	<ul style="list-style-type: none"><li>• A space inserted between a word and its associated punctuation, e.g. <i>word :</i> or <i>word ?</i> will incur 1 fault per instance</li><li>• Incorrect or omitted paired punctuation e.g. brackets, single quotes will incur 1 fault per 'pair', e.g. ( <i>Progress Group</i> ), ' <i>Progress Group</i> '</li></ul>
1.3 contains handwritten character(s)	
1.4 has no space following it	

Marking Criteria	Tutor Notes
<p>1.5 has more than 2 character spaces following it, except where appropriate, e.g. before postcode, after punctuation</p>	<p>In continuous text, 1 fault per instance will be incurred for:</p> <ul style="list-style-type: none"> <li>• more than 3 spaces appearing after a full stop, question mark, exclamation mark or colon</li> <li>• 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</li> <li>• 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 (<math>\frac{3}{4}</math>" ) to spare (measuring the short line against the longest line in the document)</li> </ul>
<p>1.6 contains overtyping, including overtyping of pre-printed material (per entry regardless of the number of words involved) e.g. text cutting through letterhead template</p>	
<p>1.7 does not contain initial capitals:</p> <ul style="list-style-type: none"> <li>- as presented in the draft</li> <li>- for the first letter of a sentence</li> </ul>	<ul style="list-style-type: none"> <li>• 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</li> <li>• Failure to insert a capital letter following a penalty for an omitted full stop will not be penalised.</li> <li>• inserting a capital letter following a penalty for an incorrect full stop will not be penalised</li> </ul>

<b>Section 2 Faults – omissions and additions</b> <b>One fault will be given for each instance of:</b>	
<p>2.1 each word which is the wrong word and a word that has been omitted or added or not removed as instructed (e.g. a word which is crossed out in the draft)</p>	<p><b>Letters</b></p> <ul style="list-style-type: none"> <li>• Candidates will incur a fault if they set up their own reference (not as draft)</li> <li>• In the letter the reference, date 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 and punctuation (do not expand <i>ref</i>)</li> <li>• Any style of date is acceptable, with the exception of the American numerical format, e.g. 12/25/2011 as Christmas Day</li> <li>• Dates must appear below the letterhead and above the salutation of the letter and should have a clear line space above/below</li> <li>• Dates will not be acceptable in the header/footer details alone</li> <li>• 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</li> <li>• All errors in other dates are penalised per element</li> </ul>

Marking Criteria	Tutor Notes
	<ul style="list-style-type: none"> <li>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</li> </ul>
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 item of merged data missing from a requested printed document	<ul style="list-style-type: none"> <li>To a maximum of 4 faults per missing document</li> </ul>
2.5 failure to delete a record as instructed	<ul style="list-style-type: none"> <li>Failure to delete a record as instructed, or to delete a record in its entirety, will incur 1 fault per record</li> </ul>
2.6 incorrectly deleting and/or duplication of a record	<ul style="list-style-type: none"> <li>Incorrect deletion and/or duplication of a recalled record incurs 1 fault per record</li> </ul>
2.7 a printout of an unrequested merged document	
2.8 each unrequested merged label	<ul style="list-style-type: none"> <li>To a maximum of 4 faults</li> </ul>

<b>Section 3 Faults - transpositions and misplacements</b>	
<b>One fault will be given for each instance of:</b>	
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"> <li>Each instance of misplaced item of variable information will be penalised (on standard document only)</li> </ul>
3.3 failure to 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"> <li>Datafile not sorted correctly on specified field will incur 1 fault</li> </ul>
<b>Section 4 Faults – presentation</b>	
<b>No more than one fault per paper for each of the following items:</b>	
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"> <li>ragged left margin, e.g. additional character spacing at the beginning of a paragraph</li> <li>headings not keyed in at the left margin, as presented in draft</li> </ul> <p>NB: datafiles and labels are exempt from this requirement</p>

Marking Criteria	Tutor Notes
4B no clear line space before and after separate items within a document	<ul style="list-style-type: none"> <li>Failure to leave a clear line space before and after separate items within a document, e.g. before/after headings, between paragraphs or after template</li> <li>Where letterhead template is centred or right aligned there is no requirement for a clear line space below the letterhead. Where letterhead template is left aligned a clear line space must be left.</li> </ul>
4C not applicable to this unit	
4D failure to emphasise text as instructed	<p>This includes:</p> <ul style="list-style-type: none"> <li>Emphasis extended beyond the section of text specified</li> <li>Additional emphasis of text in a document where not requested (except for headings – see 4J below)</li> <li>Emphasis may be bold, italic, underline, change of font style/size only</li> </ul>
4E not applicable to this unit	
4F not applicable to this unit	
4G work which is creased, torn or dirty	<ul style="list-style-type: none"> <li>Invigilators should notify OCR of any machine faults resulting in marks on the paper</li> <li>Invigilators should also report any problems with printers, so as not to disadvantage candidates</li> </ul>
4H incorrect stationery used	<ul style="list-style-type: none"> <li>Labels should be printed on one sheet of A4 paper except where label stationery is used.</li> <li>Merged letters must be printed on portrait A4 letterhead</li> <li>Datafiles must be printed on A4 plain paper either in landscape or portrait</li> <li>Failure to use OCR templates supplied for the examination</li> <li>Templates, including company information and margins, must not be altered in any way</li> </ul>
4I inconsistent spacing between and within similar items within a document	<ul style="list-style-type: none"> <li>Inconsistent spacing (including line spacing) between and within similar items is only penalised if a comparison with a similar item can be made within the same document</li> </ul>
4J - use of initial capitals where not presented in draft, or - closed capitals used where not presented in draft, or - failure to use closed 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"> <li>use of initial capitals where initial capitals were not presented in draft, e.g. <i>Sincerely</i> in complimentary close</li> <li>closed capitals used where not presented in draft, e.g. <i>WHITE</i> instead of <i>White</i>.</li> <li>failure to use closed capitals as presented in draft, e.g. <i>DISEASES</i> keyed in as <i>Diseases</i>.</li> <li>failure to underline headings, including subheadings, as presented in the draft, e.g. "<u>Miscellaneous Household Items</u>" keyed in as "Miscellaneous Household Items"</li> <li>capitalisation faults in postcodes</li> </ul>

Marking Criteria	Tutor Notes
	<ul style="list-style-type: none"> <li>• candidates should key in data exactly as shown in the draft but additional emboldening, italicising or underlining of headings will not be penalised</li> </ul>
4K inconsistent use of alternative spellings within a document	<ul style="list-style-type: none"> <li>• Alternative spellings found in an English dictionary will be accepted but will incur a fault if used inconsistently, e.g. <i>organize</i> but <i>organisation</i> within the same document</li> </ul>
4L inconsistent display of dates, measurements, weights, times, money, figures, dashes/hyphens within a document	<ul style="list-style-type: none"> <li>• Dates must be of consistent style throughout a document. For example, if full style is used such as <i>12 January 2011</i>, this style should be used for all subsequent dates within the same document. (Please also refer to Section 2.1 Notes above.)</li> <li>• 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></li> <li>• Times should be keyed in as shown in the draft. Times must be keyed in consistently within a document e.g. <i>10.30am</i> and <i>2.30 pm</i> within the same document would incur a penalty. Candidates must ensure that times that they key in are consistent with those that appear in recalled text within a document. Candidates must not change times from 12-hour clock to 24-hour clock or vice versa unless instructed to do so.</li> <li>• Money: there must be no character space between £ and the amount, e.g. <i>£60</i>. In columns and tables, consistent spacing between £ and amount would not be penalised</li> <li>• The display of figures should be an “acceptable system”, e.g. <ul style="list-style-type: none"> <li>- all figures including “1”</li> <li>- all words (but use of words such as <i>twenty-five</i> or <i>twenty five</i> must be consistent)</li> <li>- <i>one</i> as a word, all others as figures</li> <li>- <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</li> <li>- <i>one</i> to <i>twenty</i> as words and then <i>21</i> upwards as figures</li> </ul> </li> <li>• Where dashes or hyphens are used to represent the word “to” (e.g. <i>15-22</i> or <i>15 – 22</i>) these must be used consistently throughout a document</li> <li>• Telephone numbers must be presented as draft. For example <i>024 7647 0033</i> keyed as <i>02476470033</i> would incur a penalty. (Please note: an inaccurate telephone number (e.g. <i>02576470033</i>) would also be penalised under 1.1/1.2.)</li> </ul>
4M inconsistent use of open or full punctuation within a document	<p>This includes:</p> <ul style="list-style-type: none"> <li>• 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</li> <li>• a missing full stop in any abbreviation such as <i>enc.</i>, <i>c.c.</i> e.g., <i>a.m.</i>, where full punctuation has been used</li> </ul>



Marking Criteria	Tutor Notes
4N insertion of an additional comma which alters the meaning of a sentence	<ul style="list-style-type: none"> <li>• 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</li> </ul>
4S failure to justify text or data as instructed	<ul style="list-style-type: none"> <li>• A penalty will be incurred: <ul style="list-style-type: none"> <li>– where right margin justification requested but left margin is ragged</li> <li>– if justification is lost on last line of page</li> </ul> </li> </ul>