4428 Level 1-4 NVQs in Business and Administration (QCF) - Imported Units

Level 1 NVQ Award in Business and Administration	500/9516/X
Level 1 NVQ Certificate in Business and Administration	500/9871/8
Level 2 NVQ Award in Business and Administration	500/9466/X
Level 2 NVQ Certificate in Business and Administration	500/9677/1
Level 2 NVQ Diploma in Business and Administration	501/0040/3
Level 3 NVQ Certificate in Business and Administration	500/9626/6
Level 3 NVQ Diploma in Business and Administration	500/9548/1
Level 4 NVQ Certificate in Business and Administration	500/9776/3
Level 4 NVQ Diploma in Business and Administration	500/9828/7

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City & Guilds
1 Giltspur Street
London EC1A 9DD
T +44(0) 844 543 0000   **www.cityandguilds.com**
F +44 (0)20 7294 2400   **centresupport@cityandguilds.com**

4428 Level 1-4 NVQS in Business and Administration (QCF) - Imported Units

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Contents

1   Introduction to the qualifications

This document contains the imported units available within the following qualifications:

Qualification title and level	City & Guilds qualification number	Qualification accreditation number	Last registration date	Last certification date
Level 1 NVQ Award / Certificate in Business and Administration	4428-01 / 91	500/9516/X 500/9871/8	31/12/2013	31/12/2014
Level 2 NVQ Award / Certificate / Diploma in Business and Administration	4428-02 / 92	500/9466/X 500/9677/1 501/0040/3	31/12/2013	31/12/2015
Level 3 NVQ Certificate / Diploma in Business and Administration	4428-03 /93	500/9626/6 500/9548/1	31/07/2017	31/01/2020
Level 4 NVQ Certificate / Diploma in Business and Administration	4428-04 /94	500/9776/3 500/9828/7	31/12/2013	31/12/2016

For full information on the 4428 suite of NVQs in Business and Administration see the relevant qualification handbooks available from **www.cityandguilds.com**

Imported units from the following sectors skills council/standard setting body are included in this document. Please note that whilst the Institute of Customer Service (ICS) and the Management Standards Centre (MSC) still exist the responsibility for the NOS within these sectors now fall within the Council for Administration's (CfA) remit.

Contacting the Sector Skills Councils/Standards Setting Bodies

CfA
Tel: 0207 091 9620
Fax: 0207 091 7340
Email: info@cfa.uk.com
Website: **www.cfa.uk.com**

e-skills UK
Tel: 0207 963 8920
Fax: 0207 592 9138
Email: **info@e-skills.com**
Website: **www.e-skills.com**

ICS
Tel: 01206 571716
Fax: 01206 54668
Email: **enquiries@icsmail.co.uk**
Website: **www.instituteofcustomerservice.com**

Management Standards Centre
Tel: 0207 240 2725
Email: **management.standards@managers.org.uk**
Website: **www.management-standards.org**

Unit 113   Using email 1

Level: 1
Credit value: 2
NDAQ number: J/502/4299

Unit aim

This is the ability to make the best use of e-mail software to safely and securely send, receive and store messages. On completion of this unit a candidate should be able to understand and use a range of basic e-mail software tools to send, receive and store messages for straightforward or routine activities.

E-mail tools and techniques will be defined as 'basic' because:

- the software tools and functions will be predetermined or commonly used; and
- the techniques used will be familiar or commonly undertaken.

Learning outcomes

There are **two** learning outcomes to this unit.

The learner will:
1   Use e-mail software tools and techniques to compose and send messages
2   Manage incoming email effectively

Guided learning hours

It is recommended that **15** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 1 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 113   Using email 1

Outcome 1: Use e-mail software tools and techniques to compose and send messages

Assessment Criteria

The learner can:

1.1   Use software tools to compose and format e-mail messages

1.2   Attach files to e-mail messages

1.3   Send e-mail messages

1.4   Identify how to stay safe and respect others when using e-mail

1.5   Use an address book to store and retrieve contact information

Outcome 2: Manage incoming email effectively

Assessment Criteria

The learner can:

2.1   Follow guidelines and procedures for using e-mail

2.2   Identify when and how to respond to e-mail messages

2.3   Read and respond to e-mail messages appropriately

2.4   Identify what messages to delete and when to do so

2.5   Organise and store e-mail messages

2.6   Respond appropriately to common e-mail problems

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1 Use e-mail software tools and techniques to compose and send messages

The learner should be able to and understand:

Compose and format e-mail:

Format text (font, size, colour), format paragraphs (alignment, bullets, numbered list), spell check

Send e-mail:
- To, from, cc, subject; reply, reply all, forward

Staying safe:
- Avoid inappropriate disclosure of personal information
- Avoid misuse of images
- Use appropriate language, respect confidentiality
- Use copy lists with discrimination

Address book:
- Add, edit, delete contact entries, contacts list

Outcome 2   Manage incoming email effectively
The learner should be able to and understand:

Guidelines and procedures:
- Set by employer or organisation, security, copyright
- Netiquette
- Password protection

E-mail responses:
- Decide on priorities, gather information needed to respond, decide when and who to copy in, what to do about attachments

Organise and store e-mail:
- Folders, subfolders, delete unwanted messages, backup, address lists

Email problems:
- Due to message size or number of attachments, messages from unknown users (SPAM, junk, chain-mails, 'phishing'), viruses

Unit 114 Word processing software 1

Level: 1
Credit value: 3
NDAQ number: L/502/4627

Unit aim

This is the ability to use a software application designed for the creation, editing and production of largely text-based documents.

On completion of this unit a candidate should be able to use a range of basic word processing software tools and techniques to produce appropriate, straightforward or routine documents. Any aspect that is unfamiliar will require support and advice from others.

Word processing tools and techniques will be described as 'basic' because:
- the software tools and functions will be predetermined or commonly used; and
- the techniques needed for text entry, manipulation and outputting will be straightforward or routine.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1. Enter, edit and combine text and other information accurately within word processing documents
2. Structure information within word processing documents
3. Use word processing software tools to format and present documents

Guided learning hours

It is recommended that 20 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 1 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 114   Word processing software 1

Outcome 1: Enter, edit and combine text and other information accurately within word processing documents

Assessment Criteria

The learner can:

1.1   Identify what types of information are needed in documents

1.2   Identify what templates are available and when to use them

1.3   Use keyboard or other input method to enter or insert text and other information

1.4   Combine information of different types or from different sources into a document

1.5   Enter information into existing tables, forms and templates

1.6   Use editing tools to amend document content

1.7   Store and retrieve document files effectively, in line with local guidelines and conventions where available

Outcome 2: Structure information within word processing documents

Assessment Criteria

The learner can:

2.1   Create and modify tables to organise tabular or numeric information

2.2   Select and apply heading styles to text

Outcome 3: Use word processing software tools to format and present documents

Assessment Criteria

The learner can:

3.1   Identify what formatting to use to enhance presentation of the document

3.2   Select and use appropriate techniques to format characters and paragraphs

3.3   Select and use appropriate page layout to present and print documents

3.4   Check documents meet needs, using IT tools and making corrections as necessary

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Enter, edit and combine text and other information accurately within word processing documents

The learner should be able to and understand:

Types of information:

- Text, numbers, images, other graphic elements (eg lines, borders)

Keyboard or other input method:

- Keyboard skills: using the full range of keys, typing accurately and efficiently, keyboard shortcuts

Other input methods: voice recognition, touch screen, stylus

Editing tools:

- Editing tools appropriate to the type of information, for example:
  - select, copy, cut, paste, undo, redo, drag and drop, find, replace, insert, delete, size, crop, position

Store and retrieve:

- Files (eg create, name, open, save, save as, print, close, find)

Outcome 2   Structure information within word processing documents

The learner should be able to and understand:

Tables:

- Add table, insert and delete rows and columns, adjust column width

Outcome 3 Use word processing software tools to format and present documents

The learner should be able to and understand:

Format characters:

- Size, font style (typeface), colour, bold, underline and italic

Format paragraphs:

- Alignment, bullets, numbering, line spacing, borders, shading

Page layout:

- Size, orientation, margins, page breaks, page numbering
- Standard document layouts (eg letter, memo)

Check word processed documents:

- Spell check, grammar check
- Typeface and size
- Page layout, margins, line and page breaks, tables
- Print preview
- Accuracy, consistency

Unit 115   Bespoke software

Level: 1
Credit value: 2
NDAQ number: A/502/4395

Unit aim

This is the ability to select and use a suitable bespoke software application to carry out an appropriate data processing task. It includes understanding the capabilities of the software and the types of tasks for which it is suitable, as well as the skills and techniques needed to use the software application appropriately and effectively. On completion of this unit a candidate should be able to use basic bespoke software tools and techniques appropriately for straightforward or routine information. Any aspect that is unfamiliar will require support and advice from others.

Bespoke software tools and techniques will be defined as 'basic' because:
- the software tools and functions involved will be predefined or commonly used;
- the range of inputting, manipulation and outputting techniques are straightforward or routine; and
- the data type and structure will be predetermined or familiar.

Learning outcomes

There are **two** learning outcomes to this unit.

The learner will:
1   Input, organise and combine information using bespoke software
2   Use tools and techniques to edit, process, format and present information

Guided learning hours

It is recommended that 15 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 1 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 115   Bespoke software

Outcome 1: Input, organise and combine information using bespoke software

Assessment Criteria

The learner can:

1.1   Input relevant information accurately into existing templates and/or files so that it is ready for processing

1.2   Organise and combine information of different forms or from different sources

1.3   Follow local and/or legal guidelines for the storage and use of data where available

1.4   Respond appropriately to data entry error messages

Outcome 2: Use tools and techniques to edit, process, format and present information

Assessment Criteria

The learner can:

2.1   Use appropriate tools and techniques to edit, process or format information

2.2   Check information meets needs, using IT tools and making corrections as appropriate

2.3   Use appropriate presentation methods and accepted layouts

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Input, organise and combine information using bespoke software

The learner should be able to and understand:

Types of bespoke information:
- Information will vary according to the software for example:
    - text, numbers, photos, scanned images, graphic elements, digital recorded sound, graphs, charts, tables

Inputting information:
- Inputting tools and techniques will vary according to the technology being used for example:
    - interface devices (eg keyboard, mouse, stylus, touch screen)
    - microphone (eg headset, built-in)
    - camera (eg web cam, video camera, mobile phone camera)

Combining information techniques:
- Insert, size, position, wrap, order, group

Guidelines for the storage and use of data:
- Set by employer or organisation or centre
- Policies relating to security, backup and data protection
- Guidelines for data format; compliance, audit and reporting requirements
- File management will vary according to the application

Outcome 2   Use tools and techniques to edit, process, format and present information
The learner should be able to and understand:

Editing, analysis and formatting techniques:
- Techniques will vary according to the software and task, for example:
  - o **Editing**: select, insert, delete, cut, copy, paste, drag and drop, find, replace, page layout, labelling, alignment, orientation, colour, resolution, size, pitch
  - o **Process**: sort, pre-set queries, simple operator formulas, charts and graphs
  - o **Formatting**: characters, lines, paragraphs, pages, file type

Check bespoke information:
- Checks will vary according to the type of information and software, but could include:
  - o spell check, grammar check
  - o accuracy of figures
  - o labelling and size of images
  - o volume of sound

Presentation methods:
- Methods will vary according to the software and task, for example:
  - o on screen display, publishing on a web site, hard copy print out, digital file
- Organisational house style, branding

Unit 116 Data management software

Level: 1
Credit value: 2
NDAQ number: F/502/4558

Unit aim

This is the ability to use a software application designed to store and retrieve data needed for a variety of business functions. It also includes an understanding of the features and facilities of the software and the purpose for which the data is stored.

On completion of this unit a candidate should be able to use basic data management software tools and techniques to:
- enter straightforward or routine information using pre-set data-entry screens;
- retrieve information by running predefined methods; and
- produce reports using predefined menus or short cuts.

The tools and techniques will be described as 'basic' because:
- the tools and functions will be predefined or commonly used; and
- the techniques for inputting, manipulation and outputting data will be straightforward or routine.

The structure and functionality of the data management system will be predefined.

Examples of context: Adding or amending customer details into a company CRM system such as Integra; booking patient appointments for doctor, dentist or hospital; registering new student details onto a school or college SIMS database

Learning outcomes

There are **two** learning outcomes to this unit.

The learner will:
1. Enter, edit and maintain data records in a data management system
2. Retrieve and display data records to meet requirements

Guided learning hours

It is recommended that 15 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 1 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 116　　　Data management software

Outcome 1: Enter, edit and maintain data records in a data management system

Assessment Criteria

The learner can:

1.1　　Identify the security procedures used to protect data

1.2　　Enter data accurately into records to meet requirements

1.3　　Locate and amend individual data records

1.4　　Check data records meet needs, using IT tools and making corrections as necessary

1.5　　Respond appropriately to data entry error messages

1.6　　Follow local and/or legal guidelines for the storage and use of data where available

Outcome 2: Retrieve and display data records to meet requirements

Assessment Criteria

The learner can:

2.1　　Search for and retrieve information using pre-defined methods to meet given requirements

2.2　　Identify which report to run to output the required information

2.3　　Select and view specified reports to output information to meet given requirements

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1　　　Enter, edit and maintain data records in a data management system

The learner should be able to and understand:

Enter data:
- Use of data entry form, create new record, add record to table

Amend data records:
- Find, search and replace
- Edit record, sort, use wildcards

Check data records:
- Spell check, format, accuracy, consistency, remove duplication, verify data

Security procedures:
- Access control

- Authorised use, password protection and management, user authentication

Error messages:
- Due to field size, data type, validation checks
- Duplicate records
- Format
- Using help

Guidelines for the storage and use of data:
- Set by employer or organisation or centre
- Policies relating to security, backup and data protection
- Guidelines for data format
- Compliance, audit and reporting requirements
- File management will vary according to the application.

Outcome 2   Retrieve and display data records to meet requirements
The learner should be able to and understand:

Search and retrieve:
- Alphanumeric sort, filter, single criteria, standard queries

Reports:
- Accessing reports that have already been run
- Using menus or shortcuts, report templates to produce standard reports based on current data

Unit 117 Database software

Level: 1
Credit value: 3
NDAQ number: H/502/4553

Unit aim

This is the ability to use a software application designed to organise and store structured information and generate reports.

On completion of this unit a candidate should be able to use basic database software tools and techniques to:
- enter straightforward or routine information into a database;
- set up a single table in a flat file database;
- retrieve information by running routine queries; and
- produce reports using predefined menus or short cuts.

The structure and functionality of the database will be predefined. Any aspects that are unfamiliar will require support and advice from others.

Database tools and techniques will be described as 'basic' because:
- the tools and functions will be predefined or commonly used; and
- the techniques for inputting, manipulation and outputting will be straightforward or routine.

Examples of context: Enter names and addresses into a customer database; update stock control data.

Learning outcomes

There are **two** learning outcomes to this unit.

The learner will:
1. Enter, edit and organise structured information in a database
2. Use database software tools to extract information and produce reports

Guided learning hours

It is recommended that 20 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 1 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 117   Database software

Outcome 1: Enter, edit and organise structured information in a database

Assessment Criteria
The learner can:

1.1   Identify the main components of a database

1.2   Create a database table for a purpose using specified fields

1.3   Enter structured data into records to meet requirements

1.4   Locate and amend data records

1.5   Respond appropriately to data entry error messages

1.6   Check data meets needs, using IT tools and making corrections as necessary

Outcome 2: Use database software tools to extract information and produce reports

Assessment Criteria
The learner can:

2.1   Identify queries which meet information requirements

2.2   Run simple database queries

2.3   Identify reports which meet information requirements

2.4   Generate and print pre-defined database reports

Teaching guidance
The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Enter, edit and organise structured information in a database
The learner should be able to and understand:

Database components:
- What types of information are stored:
    o   tables, forms, queries, reports

Enter structured data:
- Tables, fields, records
- Use of data entry form, create new record, add record to table

Locate and amend:
- Find, search and replace

- Sort
- Wildcards

Data entry errors:
- Due to field size, data type, validation checks
- Using help

Check data:
- Spell check, format, accuracy, consistency

Outcome 2   Use database software tools to extract information and produce reports
The learner should be able to and understand:

Database queries:
- Alphanumeric sort, filter, single criteria

Database reports:
- Using menus, wizards or shortcuts

Unit 118   Improving productivity using IT

Level: 1
Credit value: 3
NDAQ number: T/502/4153

Unit aim

This is the ability to plan, evaluate and improve procedures involving the use of IT tools and systems to improve the productivity and efficiency of tasks and activities.

On completion of this unit the candidate should be able to plan and review their use of predefined or commonly used IT tools for activities that are straightforward or routine. As a result of reviewing their work, they will be able to identify and use automated methods or alternative ways of working to improve productivity.

Examples of context: Using keyboard shortcuts for common tasks

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1   Plan the use of appropriate IT systems and software to meet requirements
2   Use IT systems and software efficiently to complete planned tasks
3   Review the selection and use of IT tools to make sure that work activities are successful

Guided learning hours

It is recommended that 20 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 1 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 118   Improving productivity using IT

Outcome 1: Plan the use of appropriate IT systems and software to meet requirements

Assessment Criteria

The learner can:

1.1   Identify the purpose for using IT

1.2   Identify the methods, skills and resources required to complete the task successfully

1.3   Plan how to carry out the task using IT to achieve the required purpose and outcome

1.4   Identify reasons for choosing particular IT systems and software applications for the task

1.5   Select IT systems and software applications as appropriate for the purpose

1.6   Identify any legal or local guidelines or constraints that may affect the task or activity

Outcome 2: Use IT systems and software efficiently to complete planned tasks

Assessment Criteria

The learner can:

2.1   Identify automated routines to improve productivity

2.2   Use automated routines that aid efficient processing or presentation

2.3   Complete planned tasks using IT

Outcome 3: Review the selection and use of IT tools to make sure that work activities are successful

Assessment Criteria

The learner can:

3.1   Review outcomes to make sure they meet the requirements of the task and are fit for purpose

3.2   Decide whether the IT tools selected were appropriate for the task and purpose

3.3   Identify the strengths and weaknesses of the completed task

3.4   Identify ways to make further improvements to work

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Plan the use of appropriate IT systems and software to meet requirements

The learner should understand:

Purpose for using IT:
- Who and what the information is for
- When it must be finished and what information needs to be included
- Where it will be used (on screen, sent to others, printed)

Reasons for choosing IT:
- Time, convenience, cost; benefits of IT or manual methods of preparing, processing and presenting the same information
- Own views on convenience and effectiveness at meeting needs, quality, accuracy
- How IT can make tasks easier than other methods, streamline business processes, increase productivity

Legal or local guidelines or constraints which may include:
- Data protection, copyright, software licensing
- Security
- Organisational house-style or brand guidelines
- Local guidelines for working with IT and storage of information

Outcome 2 Use IT systems and software efficiently to complete planned tasks

The learner should be able to use and understand:
- Automated routines:
- Short cuts
- Customised menus and tool bars
- Run pre-set macros
- Templates

Outcome 3   Review the selection and use of IT tools to make sure that work activities are successful

The learner should be able to and understand:

Review outcomes:
- Quality of information used
- Produce drafts
- Review against initial plans
- Check with intended audience

Strengths and weaknesses:
- Format, layout
- Accuracy
- Clarity for audience

Improvements to work:
- Correct mistakes
- Avoid affecting other people's work
- Better ways of doing things, learning new techniques

Unit 119   IT security for users

Level: 1
Credit value: 1
NDAQ number: R/502/4256

Unit aim

This is the ability to protect hardware, software malfunction and unauthorised access. On completion of this unit the candidate should be able to identify day-to-day security risks and the laws and guidelines that affect the use of IT; and use simple methods to protect software and personal data (eg risks from people getting access to it who are not authorised, from viruses or from hardware not working properly).

Examples of context: Regular change of password using a range of alphanumeric characters and symbols. Understanding the importance of applying organisational procedures for maintaining security consistently.

Learning outcomes

There is **one** learning outcome to this unit.

The learner will:
   1   Use appropriate methods to minimise security risks to IT systems and data

Guided learning hours

It is recommended that 10 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 1 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 119   IT security for users

Outcome 1: Use appropriate methods to minimise security risks to IT systems and data

Assessment Criteria
The learner can:

1.1   Identify security issues that may threaten system performance

1.2   Take appropriate security precautions to protect IT systems and data

1.3   Identify threats to information security associated with the widespread use of technology

1.4   Take appropriate precautions to keep information secure

1.5   Follow relevant guidelines and procedures for the secure use of IT

1.6   Describe why it is important to backup data securely

1.7   Ensure personal data is backed up to appropriate media

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Use appropriate methods to minimise security risks to IT systems and data

The learner should be able to and understand:

Threats to system performance:
- Unwanted e-mail (often referred to as "spam"), malicious programs (including viruses, worms, trojans, spyware, adware and rogue diallers) and hackers; hoaxes

Security precautions:
- Use access controls: Physical controls, locks, passwords, access levels
- Run anti-virus software, adjust firewall settings, adjust internet security settings; carry out security checks, report security threats or breaches
- Backup; store personal data and software safely
- Treat messages, files, software and attachments from unknown sources with caution

Threats to information security:
- From theft, unauthorised access, accidental file deletion, use of removable storage media
- Malicious programs (including viruses, worms, trojans, spyware, adware and rogue diallers), hackers, phishing and identity theft
- Unsecured and public networks, default passwords and settings, wireless networks, Bluetooth, portable and USB devices

Access to information sources:

- Username and password/PIN selection, how and when to change passwords; online identity/profile
- Real name, pseudonym, avatar; what personal information to include, who can see the information
- Respect confidentiality, avoid inappropriate disclosure of information

Security guidelines and procedures:
- Set by: employer or organisation; security, privacy

Unit 120 Presentation software

Level: 1
Credit value: 3
NDAQ number: K/502/4621

Unit aim

This is the ability to use software applications to produce effective presentations, which include a combination of media (eg images, animation and sound) for education, entertainment or information sharing.

On completion of this unit a candidate should be able to use a range of basic presentation software tools and techniques to produce straightforward or routine presentations.

Presentation tools and techniques will be described as 'basic' because:
- the software tools and functions will be predefined or commonly used;
- the range of entry, manipulation and outputting techniques will be straightforward or routine; and
- the inputting, manipulating and outputting of the information will be predetermined, straightforward or routine.

Examples of context: Text-based or diagram-based slide shows and lecture notes.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1 Input and combine text and other information within presentation slides
2 Use presentation software tools to structure, edit and format slides
3 Prepare slides for presentation to meet needs

Guided learning hours

It is recommended that 20 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 1 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 120 Presentation software

Outcome 1: Input and combine text and other information within presentation slides

Assessment Criteria

The learner can:

1.1   Identify what types of information are required for the presentation

1.2   Select and use different slide layouts as appropriate for different types of information

1.3   Enter information into presentation slides so that it is ready for editing and formatting

1.4   Identify any constraints which may affect the presentation

1.5   Combine information of different forms or from different sources for presentations

1.6   Store and retrieve presentation files effectively, in line with local guidelines and conventions where available

Outcome 2: Use presentation software tools to structure, edit and format slides

Assessment Criteria

The learner can:

2.1   Identify what slide structure to use

2.2   Select and use an appropriate template to structure slides

2.3   Select and use appropriate techniques to edit slides

2.4   Select and use appropriate techniques to format slides

Outcome 3: Prepare slides for presentation to meet needs

Assessment Criteria

The learner can:

3.1   Identify how to present slides to meet needs and communicate effectively

3.2   Prepare slides for presentation

3.3   Check presentation meets needs, using IT tools and making corrections as necessary

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1 Input and combine text and other information within presentation slides

The learner should be able to and understand:

Types of information:
- Text, numbers, images, graphics, sound

Constraints:
- On content: copyright law (eg on music downloads or use of other people's images), acknowledgment of sources, avoiding plagiarism
- Equal opportunities, other local guidelines

Combine information for presentations:
- Combine images, charts or tables with text by inserting, re-sizing and positioning
- Use of text boxes

Store and retrieve:
- Files (eg create, name, open, save, save as, print, close, find)

Outcome 2   Use presentation software tools to structure, edit and format slides
The learner should be able to and understand:

Slide structure:
- Layout
- Use existing templates, designs and styles
- Organisational guidelines

Edit slides:
- Drag and drop, find, replace, undo/redo, size, crop and position objects
- Wrap text, add lines and simple shapes

Format slides:
- Bullets, numbering, line spacing, alignment, colour, fonts, size, backgrounds

Outcome 3   Prepare slides for presentation to meet needs
The learner should be able to and understand:

Present slides:
Timing, content, meaning
- Organisation of information
- Audience needs

Prepare slides:
- View, re-order, rehearse timing, print slides, print handouts
- Speaker notes

Check presentation:
- Spell check, grammar check, orientation, layout, slide order, text alignment and formatting, accuracy

Unit 121 Set up an IT system

Level: 1
Credit value: 3
NDAQ number: Y/502/4209

Unit aim

This unit is about the ability to safely set up the components of an IT system (eg personal computer - PC, keyboard, mouse and printer), removable storage media (eg data stick or external DVD drive), communication service to access the Internet and associated software and check that they are working properly. On completion of this unit the candidate should be able to connect up the basic components of an IT system, removable storage media and a communication service safely using default setup routines and run simple tests to check it is working successfully.

Examples of context: Following supplier instructions to assemble the component parts of a new computer; add new peripheral or storage 'plug and play' devices; recycle used computer equipment

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:
1. Connect up a personal computer, printer and peripheral devices safely
2. Connect to an IT communication service
3. Set up software for use
4. Check that the IT system and communication service are working successfully

Guided learning hours

It is recommended that 20 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 1 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 121   Set up an IT system

Outcome 1: Connect up a personal computer, printer and peripheral devices safely

Assessment Criteria

The learner can:

1.1   Identify what IT system components, storage and peripheral devices are needed and how to connect them

1.2   Identify any health and safety issues associated with setting up an IT system

1.3   Connect up the components of an IT system safely, including a printer and other peripheral devices

1.4   Connect removable storage media to a PC safely

Outcome 2: Connect to an IT communication service

Assessment Criteria

The learner can:

2.1   Connect communication hardware safely to a PC

2.2   Identify the details needed to connect to an Internet Service Provider (ISP)

2.3   Connect to a communication service from a PC

Outcome 3: Set up software for use

Assessment Criteria

The learner can:

3.1   Configure the user interface to meet needs

3.2   Identify what security precautions need to be addressed when connecting to the internet

3.3   Set up and configure virus protection software

3.4   Set up files and software to meet needs

Outcome 4: Check that the IT system and communication service are working successfully

Assessment Criteria

The learner can:

4.1   Identify simple tests that can be used to check the system

4.2   Identify simple communication tests that can be used to check the internet connection

4.3   Run tests to check that the system and communication service are working successfully

4.4   Identify how to report faults and seek expert help

4.5   Respond to error messages and report faults as appropriate

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Connect up a personal computer, printer and peripheral devices safely
The learner should be able to and understand:

Health and safety issues:
- Health and safety issues, risks from hardware, electrical connection risks and guidelines, use and disposal of cleaning materials, handling equipment. Risks to self and others from using hardware; health and safety point of contact

IT system components:
- Will vary according to the set up, for example: Personal computer, monitor, keyboard, mouse (or other pointing device)

Peripheral devices:
- Speakers, scanner, games console, joystick; Plug and play devices; default setup routines, printer and other device drivers

Removable storage media:
- Disk, CD/DVD, data/memory stick, media card, mobile device, removable hard drive; default setup routines

Outcome 2   Connect to an IT communication service
The learner should be able to and understand:

Communication hardware:
- Router, modem, mobile data device, wireless router

Communication service:
- Broadband, dial up, wireless, network connections, mobile device

Outcome 3   Set up software for use
The learner should be able to and understand:

User interface:
- Operating system, date, time, language settings; Set up user account; desktop shortcuts

Set up files and software applications:
- Software licence; installation disks; manuals; default settings; autosave settings; secure removal/transfer of data

Outcome 4   Check that the IT system and communication service are working successfully
The learner should be able to and understand:

System tests:

- Hardware and software; Print test pages, check files are saved on storage media, open and close applications; open and close files; access network files and applications; certificates and labelling

Communication tests:
- Send and receive test email, navigate to ISP website

Report faults:
- Helpdesk; information needed by experts; manufacturer's faults

Unit 122   Spreadsheet software

Level: 1
Credit value: 3
NDAQ number: A/502/4624

Unit aim

On completion of this unit a candidate should be able to use a range of basic spreadsheet software tools and techniques to produce, present and check spreadsheets that are straightforward or routine. Any aspect that is unfamiliar will require support and advice from others.

Spreadsheet software tools and techniques will be defined as 'basic' because:
- the range of data entry, manipulation, formatting and outputting techniques are straightforward;
- the tools, formulas and functions involved will be predetermined or commonly used (for example, sum, divide, multiply, take away and fractions); and
- the structure and functionality of the spreadsheet will be predetermined or familiar.

Examples of context: Typical examples may include - a duty rota for staff or a work sheet for keeping track of expenses.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1   Use a spreadsheet to enter, edit and organise numerical and other data
2   Use appropriate formulas and tools to summarise and display spreadsheet information
3   Select and use appropriate tools and techniques to present spreadsheet information effectively

Guided learning hours

It is recommended that 20 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 1 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 122   Spreadsheet software

Outcome 1: Use a spreadsheet to enter, edit and organise numerical and other data

Assessment Criteria

The learner can:

1.1   Identify what numerical and other information is needed and how the spreadsheet should be structured to meet needs

1.2   Enter and edit numerical and other data accurately

1.3   Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available

Outcome 2: Use appropriate formulas and tools to summarise and display spreadsheet information

Assessment Criteria

The learner can:

2.1   Identify how to summarise and display the required information

2.2   Use functions and formulas to meet calculation requirements

2.3   Use spreadsheet tools and techniques to summarise and display information

Outcome 3: Select and use appropriate tools and techniques to present spreadsheet information effectively

Assessment Criteria

The learner can:

3.1   Select and use appropriate tools and techniques to format spreadsheet cells, rows and columns

3.2   Identify which chart or graph type to use to display information

3.3   Select and use appropriate tools and techniques to generate, develop and format charts and graphs

3.4   Select and use appropriate page layout to present and print spreadsheet information

3.5   Check information meets needs, using spreadsheet tools and making corrections as necessary

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Use a spreadsheet to enter, edit and organise numerical and other data

The learner should be able to and understand:

Browser tools:
- Enter, back, forward, refresh, history, bookmark, new window, new tab
- Numerical and other information:
- Numbers, charts, graphs, text

Spreadsheet structure:
- Spreadsheet components (eg cells, rows, columns, tabs, pages, charts) and their layout

Enter and edit:
- Enter data into existing spreadsheet, create new spreadsheet, insert information into single cells, clear cells, edit cell contents, replicate data, find and replace, add and delete rows and columns

Store and retrieve:
- Files (eg create, name, open, save, save as, print, close, find)

Outcome 2   Use appropriate formulas and tools to summarise and display spreadsheet information

The learner should be able to and understand:

Summarise and interpret:
- Totals and summary information
- Sorting and display order
- Lists, tables, graphs and charts
- Judgment of when and how to use these methods

Functions and formulas:
- Simple arithmetic formulas (add, subtract, multiply, divide), common functions (eg Sum, Average, Round)
- Design of formulas to meet calculation requirements

Outcome 3   Select and use appropriate tools and techniques to present spreadsheet information effectively
- The learner should be able to and understand:

Format cells:
- Numbers, currency, percentages, number of decimal places, font and alignment, borders and shading

Format rows and columns:
- Height, width, borders and shading

Format charts and graphs:
- Chart type (eg pie chart, bar chart, single line graph), title, axis titles, legend

Page layout:
- Size, orientation, margins, page numbers, date and time

Check spreadsheet information:
- Accuracy of numbers, formulas and any text
- Accuracy of results
- Suitability of charts and graphs

Unit 123   Using collaborative technologies

Level: 1
Credit value: 3
NDAQ number: A/502/4378

Unit aim

This is the ability to use IT tools and devices for collaborative working and communications, such as web or video conferencing, instant messaging/chat, online phone and video calls; online forums, social networking sites, wikis and other centralised depositories for documents, blogging, RSS and data feeds, bulk SMS or online work management tools.

On completion of this unit a candidate should be able to safely use IT tool and devices to work collaboratively by:
- preparing and accessing IT tools and devices;
- playing a responsible and active role in real-time communication; and
- contributing relevant information.

Any aspect that is unfamiliar will require support and advice from others.

Examples of context: Typical collaborative activities may include – setting up a profile on a social networking site, taking part in an online conference or chat session.

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:
1. Stay safe and secure when using collaborative technology
2. Set up and access IT tools and devices for collaborative working
3. Prepare collaborative technologies for use
4. Contribute to tasks using collaborative technologies

Guided learning hours

It is recommended that 20 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 1 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 123   Using collaborative technologies

Outcome 1: Stay safe and secure when using collaborative technology

Assessment Criteria

The learner can:

1.1   Follow guidelines for working with collaborative technology

1.2   Identify risks in using collaborative technology and why it is important to avoid them

1.3   Carry out straightforward checks on others' online identities and different types of information

1.4   Identify when and how to report online safety and security issues

1.5   Identify what methods are used to promote trust

Outcome 2: Set up and access IT tools and devices for collaborative working

Assessment Criteria

The learner can:

2.1   Set up IT tools and devices that will enable you to contribute to collaborative work

2.2   Identify the purpose for using collaborative technologies and expected outcomes

2.3   Identify which collaborative technology tools and devices to use for different communication media

2.4   Identify what terms and conditions apply to using collaborative technologies

Outcome 3: Prepare collaborative technologies for use

Assessment Criteria

The learner can:

3.1   Use given details to access collaborative technologies needed for a collaborative task

3.2   Adjust basic settings on collaborative technologies

3.3   Change the environment of collaborative technologies

3.4   Set up and use a data reader to feed information

3.5   Identify what and why permissions are set to allow others to access information

Outcome 4: Contribute to tasks using collaborative technologies

Assessment Criteria

The learner can:

4.1   Contribute responsibly and actively to collaborative working

4.2   Contribute to producing and archiving the agreed outcome of collaborative working

4.3   Identify when there is a problem with collaborative technologies and where to get help

4.4   Respond to simple problems with collaborative technologies

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Stay safe and secure when using collaborative technology

The learner should be able to and understand:

Guidelines for using collaborative technology:
- Guidelines set by your organisation or community of interest
- About uses, security, safety, copyright, plagiarism, libel, confidentiality and data protection

Risks when working with collaborative technologies:
- Inappropriate disclosure of personal information, misuse of images, appropriate language, respect confidentiality, copy lists, what to do in a power cut, about data loss

Checks on others' identities and different types of information:
- Compare sources, cross references

Methods to promote trust:
- Contact information, membership of professional bodies, recommendations, links

Outcome 2   Set up and access IT tools and devices for collaborative working

The learner should be able to and understand:

Connect and configure collaborative technologies:
- Connect to another site, check whether both sites are connected

Purposes for collaborative working:
- Will vary according to the task, but may include:
    o sharing, displaying and recording information
    o discussing and reflecting, establishing identity, joining interest groups
    o developing ideas, contributing to research

Outcomes of collaborative working:
- Measurable (e.g. document, minutes, notes, project plan, transcript)
- Ephemeral (e.g. conversation, agreement)

Collaborative technology tools and devices:
- Hardware: mobile, laptop, desktop, peripherals (eg headset, handset, microphone, camera, 3G modem)
- Software: products, services, sites

Communication media:
- Text, audio/spoken, still/video/animated images

Outcome 3   Prepare collaborative technologies for use

The learner should be able to and understand:

Access to collaborative technologies:
- Download software, agree terms and conditions, register or set up an ID

Adjust settings:
- Hardware: colour, type size, window size, volume
- Browser: cookies, pop-ups
- Security settings: firewall

Environments for collaborative technologies:
- User interface: choose skins, templates
- Work environment: lighting, position of devices

Permissions:
- Web address, phone number, user name and password, access code

Outcome 4   Contribute to tasks using collaborative technologies
The learner should be able to and understand:

Contributing responsibly:
- Follow the rules of 'netiquette', respect others contributions, avoid dominating and not responding

Archiving collaborative outcomes:
- Cut, paste, save

Problems with collaborative technologies:
- Routine (eg settings, software not responding, hardware connections)

Respond to problems:
- Follow on screen help, know who to ask for expert help

Unit 124　　Website software

Level:　　1
Credit value:　　3
NDAQ number:　L/502/4630

Unit aim

This is the ability to use a software application designed for planning, designing and building websites.

On completion of this unit a candidate should be able to use basic website software tools and techniques appropriately to produce straightforward or routine single web pages from pre-set templates.

Website software tools and techniques will be defined as 'basic' because:
- the software tools and functions involved will be predefined or commonly used;
- the range of inputting, manipulation and outputting techniques are straightforward or routine; and
- the template used for the content will be predetermined or familiar.

Examples of context: Personal webpage or blog created in social networking, learning or auction site; information pages created within web or content management system.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1　Plan and create web pages
2　Use website software tools to structure and format web pages
3　Publish web pages to the Internet or an intranet

Guided learning hours

It is recommended that 20 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 1 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 124   Website software

Outcome 1: Plan and create web pages

Assessment Criteria

The learner can:

1.1   Identify what content and layout will be needed in the web page

1.2   Identify the purpose of the webpage and intended audience

1.3   Select and use a website design template to create a single web page

1.4   Enter or insert content for web pages so that it is ready for editing and formatting

1.5   Organise and combine information needed for web pages

1.6   Identify copyright and other constraints on using others' information

1.7   Identify what file types to use for saving content

1.8   Store and retrieve web files effectively, in line with local guidelines and conventions where available

Outcome 2: Use website software tools to structure and format web pages

Assessment Criteria

The learner can:

2.1   Identify what editing and formatting to use to aid both clarity and navigation

2.2   Select and use website features to help the user navigate simple websites

2.3   Use appropriate editing and formatting techniques

2.4   Check web pages meet needs, using IT tools and making corrections as necessary

Outcome 3: Publish web pages to the Internet or an intranet

Assessment Criteria

The learner can:

3.1   Upload content to a website

3.2   Respond appropriately to common problems when testing a web page

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1 Plan and create web pages

The learner should be able to and understand:

Content and layout:

- Web page content and layout will vary according to the template, but may include:
  - text (eg body text, headings, captions)
  - images (eg still photographs, diagrams)
  - numbers (eg tables, charts or graphs)
  - background (eg colours, gradients, patterns, textures)

Web site templates:
- Design lay out will vary according to the template, but may include:
  - text (eg body text, headings, captions)
  - images (eg still photographs, diagrams)
  - numbers (eg tables, charts or graphs)
  - background (eg colours, gradients, patterns, textures)

Combine information:
- Combine images with text (eg photo captions)
- Presentation with audio and/or video
- Numbers with charts and graphs

Copyright constraints:
- Effect of copyright law (eg on music downloads or use of other people's images)
- Acknowledgment of sources, avoiding plagiarism, permissions

File types:
- Text (eg rtf, doc, pdf)
- Images (eg jpeg, tiff, psd)
- Charts and graphs (eg xls)
- Sound (eg wav, MP3)

Store and retrieve:
- Files (eg create, name, open, save, save as, print, close, find)

Outcome 2   Use website software tools to structure and format web pages
The learner should be able to and understand:

Website features:
- Web page features will vary, but may include:
- navigation (eg action buttons, links, hot spots)

Editing techniques:
- Editing techniques will vary in line with the type of information, for example:
- select, copy, cut, paste, undo, redo, drag and drop, find, replace, size, crop, position

Check web pages:
- Spell check, grammar check, word count; image size, alignment and orientation
- Suitability of file format

Outcome 3   Publish web pages to the Internet or an intranet
The learner should be able to and understand:

Upload and publish website:
- Upload content to a template

Website testing:
- View web page using browser software

Problems with websites:
- Problems may vary, but could include:
    - content that is not appropriate for the template or missing
    - text that is not readable or missing
    - images that are oriented or sized wrongly

Unit 232 Bespoke software

Level: 2
Credit value: 3
NDAQ number: F/502/4396

Unit aim

This is the ability to select and use a suitable bespoke software application to carry out an appropriate data processing task. It includes understanding the capabilities of the software and the types of tasks for which it is suitable, as well as the skills and techniques needed to use the software application appropriately and effectively. On completion of this unit a candidate should be able to select and use a wide range of intermediate bespoke software tools and techniques for information that is at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.

Bespoke software tools and techniques will be defined as 'intermediate' because:
- the software tools and functions involved will at times be non-routine or unfamiliar;
- the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements and at times be multi-step; and
- the user will take some responsibility for inputting, manipulating and outputting the information.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1 Input and combine information using bespoke applications
2 Use appropriate structures to organise and retrieve information efficiently
3 Use the functions of the software effectively to process and present information

Guided learning hours

It is recommended that 20 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 2 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 232 Bespoke software

Outcome 1: Input and combine information using bespoke applications

Assessment Criteria

The learner can:

1.1 Input relevant information accurately so that it is ready for processing

1.2 Select and use appropriate techniques to link and combine information of different forms or from different sources within the software

1.3 Respond appropriately to data entry error messages

Outcome 2: Use appropriate structures to organise and retrieve information efficiently

Assessment Criteria

The learner can:

2.1 Describe what functions to apply to structure and layout information effectively

2.2 Select and use appropriate structures and/or layouts to organise information

2.3 Apply local and/or legal guidelines and conventions for the storage and use of data where available

Outcome 3: Use the functions of the software effectively to process and present information

Assessment Criteria

The learner can:

3.1 Select and use appropriate tools and techniques to edit, process and format information

3.2 Check information meets needs, using IT tools and making corrections as necessary

3.3 Select and use appropriate methods to present information

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1 Input and combine information using bespoke applications

The learner should be able to and understand:

Types of bespoke information:
- Information will vary according to the software for example:
  - text, numbers, photos, scanned images, graphic elements, digital recorded sound, graphs, charts, tables

Inputting information:
- Inputting tools and techniques will vary according to the technology being used for example:
  - interface devices (eg keyboard, mouse, stylus, touch screen)
  - microphone (eg headset, built-in)
  - camera (eg web cam, video camera, mobile phone camera)
  - Combining information techniques:
  - Insert, size, position, wrap, order, group, import data, links and references to external data

Outcome 2   Use appropriate structures to organise and retrieve information efficiently

The learner should be able to and understand:

Structures and layouts:
- Apply and change existing templates, set up templates for inputting or retrieving information, apply or change existing styles

Guidelines for the storage and use of data:
- Set by employer or organisation or centre
- Policies relating to security, backup and data protection
- Guidelines for data format
- Compliance, audit and reporting requirements
- File management will vary according to the application

Outcome 3   Use the functions of the software effectively to process and present information

The learner should be able to and understand:

Editing, analysis and formatting techniques:
- Techniques will vary according to the software and task, for example:
  - Editing: select, insert, delete, cut, copy, paste, drag and drop, find, replace, page layout, labelling, alignment, orientation, colour, resolution, size, pitch
  - Analysis: design queries, mathematical, logical or statistical functions
  - Formatting: characters, lines, paragraphs, pages, file type

Check information:
- Checks will vary according to the type of information and software, but could include:
  - spell check, grammar check
  - accuracy of figures
  - labelling and size of images
  - volume of sound
  - quality of images and sound
  - line, paragraph and page breaks fall appropriately
  - formatting is consistent
  - the use of headings and subheadings aid clarity
  - the placing of images or sound clips

Unit 233   Data management software

Level: 2
Credit value: 3
NDAQ number: J/502/4559

Unit aim

This is the ability to use a software application designed to store and retrieve data needed for a variety of business functions. It also includes an understanding of the features and facilities of the software and the purpose for which the data is stored.

On completion of this unit a candidate should be able to select and use intermediate data management software tools and techniques to:
- enter information into data management systems that is at times non-routine or unfamiliar;
- retrieve information using multiple selection criteria; and
- produce customised reports from the system.

The data management system tools, functions and techniques will be described as 'intermediate' because:
- the software tools and functions involved will at times be non-routine or unfamiliar; and
- the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements.

Examples of context: Setting up a new query to interrogate a CRM system and output selected records to another application

Learning outcomes

There are **two** learning outcomes to this unit.

The learner will:
1   Enter, edit and maintain data records in a data management system
2   Retrieve and display data records to meet requirements

Guided learning hours

It is recommended that 20 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 2 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 233   Data management software

Outcome 1: Enter, edit and maintain data records in a data management system

Assessment Criteria

The learner can:

1.1   Describe the risks to data security and procedures used for data protection

1.2   Enter data accurately into groups of records to meet requirements

1.3   Locate and amend data associated with groups of records

1.4   Check data records meet needs, using IT tools and making corrections as necessary

1.5   Respond appropriately to data entry and other error messages

1.6   Apply local and/or legal guidelines for the storage and use of data where available

Outcome 2: Retrieve and display data records to meet requirements

Assessment Criteria

The learner can:

2.1   Identify what queries and reports need to be run to output the required information

2.2   Select and use queries to search for and retrieve information to meet given requirements

2.3   Create and view reports to output information from the system to meet given requirements

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1 Enter, edit and maintain data records in a data management system

The learner should be able to and understand:

Benefits of data management system:
- Accessible, reliable, rapid access
- Shared view, up-to-date, accurate, secure
- Simplifies data handling

Enter data:
- Use of data entry form, create new record, add record to table
- Select and update fields, groups of records

Amend data records:
- Find, search and replace
- Edit record
- Sort, filter, use wildcards and search operators
- Category

Check data records:
- Spell check, format, accuracy, consistency, remove duplication
- Verify data, data validation techniques
- Record housekeeping

Error messages:
- Due to field size, data type, validation checks
- Duplicate records, format
- Using help
- System access
- Security risks and procedures:
- Access control
- Authorised use, confidentiality, personal data, password protection and management, user authentication

Guidelines for data storage and use:
- Set by employer or organisation or centre
- Topics covered: security, backup, data format, compliance and reporting, data protection, confidentiality

Outcome 2 Retrieve and display data records to meet requirements

The learner should be able to and understand:

Search and retrieve:
- Alphanumeric sort, filter, single criteria, multiple criteria, save queries and output

Reports:
- Standard reports, customised reports
- Reports with multiple parameters

Unit 234   Database software

Level: 2
Credit value: 4
NDAQ number: M/502/4555

Unit aim
This is the ability to use a software application designed to organise and store structured information and generate reports.

On completion of this unit a candidate should be able select and use intermediate database software tools and techniques to:
- enter information into databases, that is at times non-routine or unfamiliar;
- retrieve information by creating queries using multiple selection criteria; and
- produce reports by setting up menus or short cuts.

They will also be able to create and modify single table, non-relational databases. Any aspects that are unfamiliar may require support and advice from others.

Database tools, functions and techniques will be described as 'intermediate' because:
- the software tools and functions involved will at times be non-routine or unfamiliar; and
- the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements.

Examples of context: Typical 'more complex' reports may be about – sales activities, order details or project management.

Learning outcomes
There are **three** learning outcomes to this unit.

The learner will:
1   Create and modify non-relational database tables
2   Enter, edit and organise structured information in a database
3   Use database software tools to run queries and produce reports

Guided learning hours
It is recommended that 30 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards
This unit is linked to the Level 2 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body
This unit was developed by e-Skills UK.

Assessment
This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 234   Database software

Outcome 1: Create and modify non-relational database tables

Assessment Criteria
The learner can:

1.1   Identify the components of a database design

1.2   Describe the field characteristics for the data required

1.3   Create and modify database tables using a range of field types

1.4   Describe ways to maintain data integrity

1.5   Respond appropriately to problems with database tables

1.6   Use database tools and techniques to ensure data integrity is maintained

Outcome 2: Enter, edit and organise structured information in a database

Assessment Criteria
The learner can:

2.1   Create forms to enter, edit and organise data in a database

2.2   Select and use appropriate tools and techniques to format data entry forms

2.3   Check data entry meets needs, using IT tools and making corrections as necessary

2.4   Respond appropriately to data entry errors

Outcome 3: Use database software tools to run queries and produce reports

Assessment Criteria
The learner can:

3.1   Create and run database queries using multiple criteria to display or amend selected data

3.2   Plan and produce database reports from a single table non-relational database

3.3   Select and use appropriate tools and techniques to format database reports

3.4   Check reports meet needs, using IT tools and making corrections as necessary

Teaching guidance
The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1 Create and modify non-relational database tables
The learner should be able to and understand:

Database design:

- What types of information are stored
- Use of data entry form, routine queries
- How data is structured in a single table non-relational database
- Use of indexes and key field to organise data

Data integrity:
- Unique not null primary key
- Field characteristics
- Data validation, consistency, completeness, accuracy
- Effect of malicious or accidental alteration
- Methods for maintaining integrity of existing data in a single table non-relational database
- How field characteristics contribute to data validation

Modify database table:
- Add, amend, delete field
- Field characteristics

Field types:
- Data type, field name, field size, format, validation
- Primary key

Problems with database tables:
- Redundant data, duplication, table structure, field characteristics and validation
- Sources of help

Outcome 2   Enter, edit and organise structured information in a database
The learner should be able to and understand:

Enter, edit and organise data:
- Select and update fields
- Create new records
- Locate and amend records: using wildcards, search operators
- Error checking
- Data validation

Format data entry forms:
- Field characteristics and layout, tables, colour, lookups

Check data entry:
- Spell check, format, accuracy, consistency, completeness, validity
- Security

Data entry errors:
- Due to field size, data type
- Validation checks
- Using help: deal with data that does not fit parameters, alerts, reminders
- Problems with forms

Outcome 3   Use database software tools to run queries and produce reports

The learner should be able to and understand:

Database queries:
- Alphanumeric sort, filter, single criteria, multiple criteria;
- Save queries and output

Database reports:
- Using menus, wizards or shortcuts
- Selected fields, selected records

Formatting database reports:
- Data fields
- Page and section layout
- Add text or images
- Adjust page setup for printing

Check reports:
- Completeness, accuracy, security, sorting, formatting, layout

Unit 235 Improving productivity using IT

Level: 2
Credit value: 4
NDAQ number: J/502/4156

Unit aim

This is the ability to plan, evaluate and improve procedures involving the use of IT tools and systems to improve the productivity and efficiency of tasks and activities.

On completion of this unit the candidate should be able to plan and review their use of predefined or commonly used IT tools for activities that are at times non-routine or unfamiliar. As a result of reviewing their work, they will be able to devise solutions to use IT tools to improve productivity.

Examples of context: An improvement may be creating spreadsheets to automate price list updates in a sales or accounts business context using office software.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1   Plan, select and use appropriate IT systems and software for different purposes
2   Review and adapt the ongoing use of IT tools and systems to make sure that activities are successful
3   Develop and test solutions to improve the ongoing use of IT tools and systems

Guided learning hours

It is recommended that 30 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 2 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 235   Improving productivity using IT

Outcome 1: Plan, select and use appropriate IT systems and software for different purposes

Assessment Criteria

The learner can:

1.1   Describe the purpose for using IT

1.2   Describe the methods, skills and resources required to complete the task successfully

1.3   Plan how to carry out tasks using IT to achieve the required purpose and outcome

1.4   Describe any factors that may affect the task

1.5   Select and use IT systems and software applications to complete planned tasks and produce effective outcomes

1.6   Describe how the purpose and outcomes have been met by the chosen IT systems and software applications

1.7   Describe any legal or local guidelines or constraints that may apply to the task or activity

Outcome 2: Review and adapt the ongoing use of IT tools and systems to make sure that activities are successful

Assessment Criteria

The learner can:

2.1   Review ongoing use of IT tools and techniques and change the approach as needed

2.2   Describe whether the IT tools selected were appropriate for the task and purpose

2.3   Assess strengths and weaknesses of final work

2.4   Describe ways to make further improvements to work

2.5   Review outcomes to make sure they match requirements and are fit for purpose

Outcome 3: Develop and test solutions to improve the ongoing use of IT tools and systems

Assessment Criteria

The learner can:

3.1   Review the benefits and drawbacks of IT tools and systems used, in terms of productivity and efficiency

3.2   Describe ways to improve productivity and efficiency

3.3   Develop solutions to improve own productivity in using IT

3.4   Test solutions to ensure that they work as intended

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1 Plan, select and use appropriate IT systems and software for different purposes

The learner should understand:

Purposes for using IT:
- Who and what the information is for,
- When it must be finished, what information needs to be included
- Where it will be used (on screen, sent to others, printed)

Plan task:
- What information sources are needed
- How they will be found and evaluated
- What application software will be used
- What skills and resources are needed to complete the task successfully and what are the priorities
- Requirements for content, structure and layout

Reasons for choosing IT:
- Time, convenience, cost; benefits of IT or manual methods of preparing, processing and presenting the same information
- Own views on convenience and effectiveness at meeting needs, quality, accuracy;
- How IT can make tasks easier than other methods, streamline business processes, increase productivity, any difficulties people have in using IT,
- Legal or local guidelines or constraints may include
- Data protection, copyright, software licensing
- Security
- Organisational house-style or brand guidelines
- Local guidelines for working with IT and storage of information

Outcome 2 Review and adapt the ongoing use of IT tools and systems to make sure that activities are successful

The learner should be able to and understand:

Review use of IT tools:
- Gather information to help make judgements
- Analyse information about whether the IT tools and techniques are appropriate to the task and intended outcome

IT tools selection:
- Time taken, convenience, cost, quality, accuracy, range of facilities, versatility
- Transferability of information into other formats
- Speed of Internet connection, time constraints of downloading large files

Improvements to work:
- Correct mistakes
- Avoid affecting other people's work
- More efficient and effective ways of doing things, learning new techniques

Review outcomes:
- Evaluate the quality of the information used
- Produce drafts
- Review against initial plans
- Check with intended audience
- Effect of own mistakes on others

Outcome 3   Develop and test solutions to improve the ongoing use of IT tools and systems

The learner should be able to and understand:

Ways to improve productivity and efficiency:
- Save time
- Save money
- Streamline work processes
- Increase output
- Improve quality of outputs
- Cost of solution
- Develop solutions:
- Set up short cuts
- Customise interface
- Record macros

Unit 236   IT security for users

Level: 2
Credit value: 2
NDAQ number: Y/502/4257

Unit aim

This is the ability to protect hardware, software malfunction and unauthorised access. On completion of this unit the candidate should be bale to avoid common security risks and control access to software and data; and use a wider range of methods to protect software and data (eg from exchanging information by e-mail or when downloading software from the Internet).

Examples of context: Run anti-virus software to scan system and maintain security log. Home user ensuring their PC is protected by firewall and runs up-to-date anti-virus software routinely.

Learning outcomes

There is **one** learning outcome to this unit.

The learner will:
  1   Select and use appropriate methods to minimise security risk to IT systems and data

Guided learning hours

It is recommended that 15 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 2 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 236   IT security for users

Outcome 1: Select and use appropriate methods to minimise security risk to IT systems and data

Assessment Criteria

The learner can:

1.1   Describe the security issues that may threaten system performance

1.2   Apply a range of security precautions to protect IT systems and data

1.3   Describe the threats to system and information security and integrity

1.4   Keep information secure and manage personal access to information sources securely

1.5   Describe ways to protect hardware, software and data and minimise security risk

1.6   Apply guidelines and procedures for the secure use of IT

1.7   Describe why it is important to backup data and how to do so securely

1.8   Select and use effective backup procedures for systems and data

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Select and use appropriate methods to minimise security risk to IT systems and data

The learner should be able to and understand:

Threats to system performance:

Unwanted e-mail (often referred to as "spam"), malicious programs (including viruses, worms, trojans, spyware, adware and rogue diallers) and hackers; hoaxes

Security precautions:
- Use access controls
- Configure anti-virus software, adjust firewall settings, adjust internet security settings
- Carry out security checks, report security threats or breaches
- Backup, store personal data and software safely
- Treat messages, files, software and attachments from unknown sources with caution; proxy servers; download security software patches and updates;

Threats to information security:
- From theft, unauthorised access, accidental file deletion, use of removable storage media; malicious programs (including viruses, worms, trojans, spyware, adware and rogue diallers), hackers, phishing and identity theft
- Unsecured and public networks, default passwords and settings, wireless networks, Bluetooth, portable and USB devices

Access to information sources:
- Username and password/PIN selection and management, password strength; how and when to change passwords; online identity/profile
- Real name, pseudonym, avatar; what personal information to include, who can see the information; Respect confidentiality, avoid inappropriate disclosure of information

Protect systems and data:
- Access controls: physical controls, locks, passwords, access levels
- Security measures: anti-virus software, firewalls, security software and settings
- Risk assessment
- Anti-spam software, software updates

Security guidelines and procedures:
- Set by: employer or organisation or centre
- Security, privacy, legal requirements
- How to use products to ensure information security within organisations or at home or in centre

Unit 237 Presentation software

Level: 2
Credit value: 4
NDAQ number: M/502/4622

Unit aim

This is the ability to use software applications to produce effective presentations, which include a combination of media (eg images, animation and sound) for education, entertainment or information sharing.

On completion of this unit a candidate should be able to select and use a wide range of intermediate presentation software tools and techniques effectively to produce presentations that are at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.

Presentation tools and techniques will be described as 'intermediate' because:
- the software tools and functions used will be at times non-routine or unfamiliar;
- the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements; and
- the user will take some responsibility for inputting, structuring, editing and presenting the information, which at times may be non-routine or unfamiliar.

Examples of context: A slide show with animations, transitions, video, sound or linked to an external or web-based data source

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1 Input and combine text and other information within presentation slides
2 Use presentation software tools to structure, edit and format slide sequences
3 Prepare slideshow for presentation

Guided learning hours

It is recommended that 30hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 2 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 237 Presentation software

Outcome 1: Input and combine text and other information within presentation slides

Assessment Criteria

The learner can:

1.1 Identify what types of information are required for the presentation

1.2 Enter text and other information using layouts appropriate to type of information

1.3 Insert charts and tables into presentation slides

1.4 Insert images, video or sound to enhance the presentation

1.5 Identify any constraints which may affect the presentation

1.6 Organise and combine information of different forms or from different sources for presentations

1.7 Store and retrieve presentation files effectively, in line with local guidelines and conventions where available

Outcome 2: Use presentation software tools to structure, edit and format slide sequences

Assessment Criteria

The learner can:

2.1 Identify what slide structure and themes to use

2.2 Select, change and use appropriate templates for slides

2.3 Select and use appropriate techniques to edit slides and presentations to meet needs

2.4 Select and use appropriate techniques to format slides and presentations

2.5 Identify what presentation effects to use to enhance the presentation

2.6 Select and use animation and transition effects appropriately to enhance slide sequences

Outcome 3: Prepare slideshow for presentation

Assessment Criteria

The learner can:

3.1 Describe how to present slides to meet needs and communicate effectively

3.2 Prepare slideshow for presentation

3.3 Check presentation meets needs, using IT tools and making corrections as necessary

3.4 Identify and respond to any quality problems with presentations to ensure that presentations meet needs

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Input and combine text and other information within presentation slides
The learner should be able to and understand:

Types of information:
- Text, numbers, images, graphics, sound, video

Images, video or sound for presentations:
- Clip-art, photo, scanned images, borders, create diagrams or graphics, image formats
- Pre-recorded audio/video clips, audio and video formats

Charts and tables for presentations:
- Table, pie chart, graph, diagram, organisational chart, flowchart

Combine information for presentations:
- Combine images, charts, tables with text by inserting, re-sizing and positioning; use of text boxes, presentation with audio and/or video, import information produced using other software
- Reference external information with hyperlinks

Constraints:
- On content: copyright law (eg on music downloads or use of other people's images), acknowledgment of sources, avoiding plagiarism
- Equal opportunities, other local guidelines
- On delivery (eg environment, timing)

Store and retrieve:
- Save, save as, find, open, close
- Naming protocols
- Reducing file size, save presentation as a stand alone show or as web pages

Outcome 2   Use presentation software tools to structure, edit and format slide sequences
The learner should be able to and understand:

Slide structure:
- Layout
- Use existing templates, designs and styles, organisational guidelines
- Adapt and create new templates

Presentation effects:
- Video, sound, animation, slide transitions, visual and sound effects, hyperlinks

Edit slides:
- Size, crop and position objects
- Wrap text, add captions and graphic elements, slide order
- Change orientation

Animation and transition effects:
- Adding and removing hyperlinks
- Apply and create transitions, apply animations

Format slides:
- Bullets, numbering, line spacing, alignment, colour, fonts, size, backgrounds, colour schemes, master slides
- Themes

Outcome 3   Prepare slideshow for presentation
The learner should be able to and understand:

Present slides:
- Timing, content, meaning
- Organisation of information
- Audience needs, location

Prepare slides:
- View and re-order slides
- Rehearse timing and effects
- Set up and amend slide show settings
- Print slides, handouts and speaker notes

Check presentation:
- Spell check; grammar check, orientation, layout, slide order, text alignment and formatting, accuracy, clarity, transitions and timings

Quality problems with presentations:
- Will vary according to the content, for example:
  - Text: formatting, styles
  - Images: size, position, orientation
  - Effects: timing, brightness, contrast, sound levels, order of animations

Unit 238   Set up an IT system

Level: 2
Credit value: 4
NDAQ number: L/502/4210

Unit aim

This unit is about the ability to safely set up the components of an IT system (eg personal computer - PC, keyboard, mouse and printer), removable storage media (eg data stick or external DVD drive), communication service to access the Internet and associated software and check that they are working properly. On completion of this unit the candidate should be able to select and connect up an IT system with a range of hardware, removable storage media and a communication service safely and run more advanced tests to check it is working successfully.

Examples of context: Re-assemble personal computer after moving house/office; transferring personal files to a new PC; setting up and testing a home wireless network

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:
1   Select and connect up a personal computer safely with associated hardware and storage media to meet needs
2   Select and connect an IT system to a communication service to meet needs
3   Install and configure software for use
4   Check that the IT system and communication service are working successfully

Guided learning hours

It is recommended that 30 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 2 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 238   Set up an IT system

Outcome 1: Select and connect up a personal computer safely with associated hardware and storage media to meet needs

Assessment Criteria

The learner can:

1.1   Describe what IT system components, storage and peripheral devices are needed

1.2   Describe any health and safety issues associated with setting up an IT system

1.3   Describe the characteristics of IT systems that affect performance

1.4   Select and connect up the components of an IT system safely, including any peripheral devices and storage media

Outcome 2: Select and connect an IT system to a communication service to meet needs

Assessment Criteria

The learner can:

2.1   Select and connect communication hardware safely to an IT system

2.2   Describe the factors that affect data transfer

2.3   Select and connect to a communication service from an IT system

2.4   Identify the login and password details needed to connect to an Internet Service Provider (ISP)

Outcome 3: Install and configure software for use

Assessment Criteria

The learner can:

3.1   Configure the user interface to meet needs

3.2   Describe what security precautions need to be addressed

3.3   Set up and configure virus protection software

3.4   Install and set up application software to meet needs

3.5   Backup and restore system and data files

Outcome 4: Check that the IT system and communication service are working successfully

Assessment Criteria

The learner can:

4.1   Identify what tests can be used to check the IT system and communications

4.2   Select and run suitable tests to make sure that the system and communication service are working successfully

4.3   Identify the help and troubleshooting facilities available to solve problems

4.4   Respond to faults and error messages and use help and troubleshooting facilities to determine and take appropriate action

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Select and connect up a personal computer safely with associated hardware and storage media to meet needs

The learner should be able to and understand:

Health and safety issues:
- Health and safety issues: risks from hardware, electrical connection risks and guidelines, use and disposal of cleaning materials, handling equipment
- Risks to self and others from using hardware; health and safety point of contact

IT system performance:
- Processor speed, memory size, storage capacity, network capability

IT system components:
- Will vary according to the set up, for example: personal computer or other systems, monitor, keyboard, mouse (or other pointing device)

Peripheral devices:
- Speakers, modem, scanner, games console, joystick; TV, data projector, white board
- Plug and play devices
- Customised setup routines
- Printer and other device drivers

Storage media:
- Disk, CD/DVD, data/memory stick, media card, mobile device, removable hard drive
- Customised setup routines

Outcome 2   Select and connect an IT system to a communication service to meet needs
- The learner should be able to and understand:

Communication hardware:
- Router, modem, mobile data device, wireless router

Data transfer:
- Which combinations of hardware and software offer different data transmission speeds; download capacity

Communication service:
- Broadband, dial up, wireless, network connections, mobile device, ISP

Outcome 3 Install and configure software for use

The learner should be able to and understand:

User interface:
- Operating system, date, time, language settings; Set up user account; desktop shortcuts; customise start-up

Set up applications:
- Software licence; installation disks; manuals; customised settings; download software; map network drive; register software

Outcome 4   Check that the IT system and communication service are working successfully

The learner should be able to and understand:

System tests:
- Hardware and software
- Check printer and other drivers, print test pages
- Check files are saved on storage media
- Open and close applications – including accessing across a network
- Open and close files – including accessing across a network
- Certificates and labelling

Communication tests:
- Send and receive test email, navigate to ISP website; ping IP address

Unit 239   Spreadsheet software

Level: 2
Credit value: 4
NDAQ number: F/502/4625

Unit aim

This is the ability to use a software application designed to record data in rows and columns, perform calculations with numerical data and present information using charts and graphs.

On completion of this unit a candidate should be able to select and use a wide range of intermediate spreadsheet software tools and techniques to produce, present and check spreadsheets that are at times non-routine or unfamiliar.

Spreadsheet software tools and techniques will be defined as 'intermediate' because:
- the range of data entry, manipulation and outputting techniques will be at times non-routine or unfamiliar;
- the tools, formulas and functions needed to analyse and interpret the data requires knowledge and understanding (for example, mathematical, logical, statistical or financial); and
- the user will take some responsibility for setting up or developing the structure and functionality of the spreadsheet.

Examples of context: Typical examples may include - monthly expenditure and sales figures, budgets, cash flow forecasts and graphs of results.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1. Use a spreadsheet to enter, edit and organise numerical and other data
2. Select and use appropriate formulas and data analysis tools to meet requirements
3. Select and use tools and techniques to present and format spreadsheet information

Guided learning hours

It is recommended that 30 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 2 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 239   Spreadsheet software

Outcome 1: Use a spreadsheet to enter, edit and organise numerical and other data

Assessment Criteria

The learner can:

1.1   Identify what numerical and other information is needed in the spreadsheet and how it should be structured

1.2   Enter and edit numerical and other data accurately

1.3   Combine and link data across worksheets

1.4   Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available

Outcome 2: Select and use appropriate formulas and data analysis tools to meet requirements

Assessment Criteria

The learner can:

2.1   Identify which tools and techniques to use to analyse and manipulate data to meet requirements

2.2   Select and use a range of appropriate functions and formulas to meet calculation requirements

2.3   Use a range of tools and techniques to analyse and manipulate data to meet requirements

Outcome 3: Select and use tools and techniques to present and format spreadsheet information

Assessment Criteria

The learner can:

3.1   Plan how to present and format spreadsheet information effectively to meet needs

3.2   Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets

3.3   Select and format an appropriate chart or graph type to display selected information

3.4   Select and use appropriate page layout to present and print spreadsheet information

3.5   Check information meets needs, using spreadsheet tools and making corrections as necessary

3.6   Describe how to find errors in spreadsheet formulas

3.7   Respond appropriately to any problems with spreadsheets

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Use a spreadsheet to enter, edit and organise numerical and other data
The learner should be able to and understand:

Enter and edit:
- Insert data into single and multiple cells, clear cells, edit cell contents, replicate data, find and replace, add and delete rows and columns
- Use absolute and relative cell references
- Add data and text to a chart

Numerical and other information:
- Numbers, charts, graphs, text, images

Spreadsheet structure:
- Spreadsheet components (eg cells, rows, columns, tabs, pages, charts, ranges, workbooks, worksheets)
- Structure, design and layout

Store and retrieve:
- Save, save as, find, open, close
- Open CSV file in spreadsheet application, save spreadsheet file as CSV
- Templates

Outcome 2   Select and use appropriate formulas and data analysis tools to meet requirements
The learner should be able to and understand:

Analyse and manipulate:
- Totals, sub-totals and summary data
- Sorting and display order
- Lists, tables, graphs and charts
- Filter rows and columns
- Judgment of when and how to use these methods

Functions and formulas:
- Design of formulas to meet calculation requirements
    - o   mathematical, statistical, financial, conditional
    - o   logical functions

Outcome 3   Select and use tools and techniques to present and format spreadsheet information
The learner should be able to and understand:

Format cells:
- Numbers, currency, percentages, number of decimal places, font and alignment, shading and borders; date and time formats, wrap text

Format rows and columns:
- Height, width, borders and shading, hide, freeze,

Format charts and graphs:
- Format charts and graphs: chart type (eg pie chart, bar chart, single line graph, area, column, x-y scatter, stock, radar, doughnut, surface), title, axis titles, legend, change chart type, move and resize chart

Page layout:
- Size, orientation, margins, header and footer, page breaks, page numbers, date and time, adjust page set up for printing

Check spreadsheet information:
- Accuracy of numbers, formulas and any text
- Accuracy of results; suitability of charts and graphs
- Reveal formulae
- Layout and formatting
- Validity and accuracy of analysis
- Clarity of overall spreadsheet

Problems with spreadsheets:
- Using help
- Sorting out errors in formulas, circular reference

Unit 240   Using collaborative technologies

Level: 2
Credit value: 4
NDAQ number: F/502/4379

Unit aim

This is the ability to use IT tools and devices for collaborative working and communications, such as web or video conferencing, instant messaging/chat, online phone and video calls; online forums, social networking sites, wikis and other centralised depositories for documents, blogging, RSS and data feeds, bulk SMS or online work management tools.

On completion of this unit a candidate should be able to facilitate the use of appropriate combinations of IT tool and devices for groups to work collaboratively by:
- planning and selecting the IT tools and devices to be used for work purposes and tasks;
- preparing and setting up access to collaborative technologies;
- presenting information and facilitating others contributions; and
- moderating the use of collaborative technologies.

Any aspect that is unfamiliar may require support and advice from others.

Examples of context: Typical collaborative activities may include – setting up a group on a social networking site for a work team; inviting people to join an online conference

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:
1   Stay safe and secure when working with collaborative technology
2   Plan and set up IT tools and devices for collaborative working
3   Prepare collaborative technologies for use
4   Contribute to tasks using collaborative technologies

Guided learning hours

It is recommended that 30 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 2 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 240   Using collaborative technologies

Outcome 1: Stay safe and secure when working with collaborative technology

Assessment Criteria

The learner can:

1.1   Take appropriate steps to avoid risks when working with collaborative technology, in line with relevant guidelines

1.2   Explain what risks there may be in using collaborative technology and how to keep them to a minimum

1.3   Use appropriate methods to promote trust when working collaboratively

1.4   Carry out appropriate checks on others' online identities and different types of information

1.5   Identify and respond to inappropriate content and behaviour

Outcome 2: Plan and set up IT tools and devices for collaborative working

Assessment Criteria

The learner can:

2.1   Describe the purposes for using collaborative technologies

2.2   Describe what outcomes are needed from collaborative working and whether or not archiving is required

2.3   Describe the roles, IT tools and facilities needed for collaborative tasks and communication media

2.4   Describe the features, benefits and limitations of different collaborative technology tools and devices

2.5   Describe the compatibility issues in different combinations of collaborative tools and devices

2.6   Select an appropriate combination of IT tools and devices to carry out collaborative tasks

2.7   Connect and configure the combination of IT tools and devices needed for a collaborative task

Outcome 3: Prepare collaborative technologies for use

Assessment Criteria

The learner can:

3.1   Describe what access rights and issues others may have in using collaborative technologies

3.2   Assess what permissions are needed for different users and content

3.3   Set up and use access rights to enable others to access information

3.4   Set up and use permissions to filter information

3.5   Adjust settings so that others can access IT tools and devices for collaborative working

3.6 Select and use different elements to control environments for collaborative technologies

3.7 Select and join networks and data feeds to manage data to suit collaborative tasks

Outcome 4: Contribute to tasks using collaborative technologies

Assessment Criteria
The learner can:

4.1 Describe rules of engagement for using collaborative technologies

4.2 Enable others to contribute responsibly to collaborative tasks

4.3 Present relevant and valuable information

4.4 Moderate the use of collaborative technologies

4.5 Archive the outcome of collaborative working

4.6 Assess when there is a problem with collaborative technologies and when to get expert help

4.7 Respond to problems with collaborative technologies

Teaching guidance
The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Stay safe and secure when working with collaborative technology
The learner should be able to and understand:

Guidelines for using collaborative technology:
- Guidelines set by your organisation or community of interest
- About uses, security, safety, copyright, plagiarism, libel, confidentiality and data protection

Risks when working with collaborative technologies:
- Inappropriate disclosure of personal information
- Misuse of images, appropriate language, respect confidentiality, copy lists
- What to do in a power cut, about data loss
- From unwanted or inappropriate content or access, back-ups, data exporting

Methods to promote trust:
- Contact information, membership of professional bodies, recommendations, links, policies, standards

Checks on others' online identities:
- Compare sources, cross references

Outcome 2   Plan and set up IT tools and devices for collaborative working
The learner should be able to and understand:

Purposes for collaborative working:
- Will vary according to the task, but may include:
  - o sharing, displaying and recording information
  - o discussing and reflecting, establishing identity, joining interest groups
  - o developing ideas, contributing to research, carrying out research
  - o exporting information to other formats

- o establishing communities of interest
- o managing identities, managing data

Outcomes of collaborative working:
- Measurable (eg document, minutes, notes, project plan, transcript)
- Ephemeral (eg conversation, agreement)
- Whether an audit trail is needed

Collaborative technology tools and devices:
- Hardware: mobile, laptop, desktop, peripherals (eg headset, handset, microphone, camera, 3G modem)
- Software: products, services, sites

Communication media:
- Text, audio/spoken, still/video/animated images

Connect and configure collaborative technologies:
- Connect to another site, check whether both sites are connected
- Connect to multiple sites, check when multiple sites are connected
- Adjust clarity

Compatibility issues:
- Between browser software, operating systems, plug-ins

Outcome 3   Prepare collaborative technologies for use
The learner should be able to and understand:

Access to collaborative technologies:
- Download software, agree terms and conditions, register or set up an ID
- Accessibility issues, adjusting access settings

Adjust settings:
- Hardware: colour, type size, window size, volume
- Browser: cookies, pop-ups
- Security settings: firewall

Environments for collaborative technologies:
- User interface: choose skins, templates, widgets, wizards, cut and paste from other sources
- Work environment: lighting, position of devices

Managing data for collaborative working:
- Sources, subscription details, terms and conditions
- Aims of data management
- Benefits, features and limitations of networks and feeds

Permissions:
- Web address, phone number, user name and password, set up user names and access codes

Outcome 4   Contribute to tasks using collaborative technologies
The learner should be able to and understand:

Contributing responsibly:
- Follow the rules of 'netiquette', respect others contributions, avoid dominating and not responding
- Legal and cultural issues

Moderating collaborative working:
- Reporting inappropriate content
- Checking posts
- Archiving outcomes:
- Cut, paste, save; record, transcribe

Problems with collaborative technologies:
- Routine (eg settings, software not responding, hardware connections)
- Non-routine (eg access, transmission speed, bandwidth)

Respond to problems:
- Follow on screen help, know who to ask for expert help
- Use diagnostic wizards, check bandwidth

Unit 241　　　Website software

Level: 　　　　　2
Credit value: 　4
NDAQ number: 　R/502/4631

Unit aim

This is the ability to use a software application designed for planning, designing and building websites.

On completion of this unit a candidate should be able to select and use a wide range of intermediate website software tools and techniques to produce multiple-page websites.

Website software tools and techniques will be defined as 'intermediate' because:
- the software tools and functions involved will at times be non-routine or unfamiliar;
- the choice and use of development techniques will need to take account of a number of factors or elements; and
- the user will take some responsibility for planning the website, creating or altering the template, inputting, manipulating, linking and uploading the content.

Examples of context: Create a multiple page website with menu-driven navigation for a sports club. Set up family site with photographs and linked pages for each family member.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1　Create structures and styles for websites
2　Use website software tools to prepare content for websites
3　Publish websites

Guided learning hours

It is recommended that 30 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 2 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 241   Website software

Outcome 1: Create structures and styles for websites

Assessment Criteria

The learner can:

1.1   Describe what website content and layout will be needed for each page

1.2   Plan and create web page templates to layout

1.3   Select and use website features and structures to help the user navigate round web pages within the site

1.4   Create, select and use styles to keep the appearance of web pages consistent and make them easy to understand

1.5   Describe how copyright and other constraints may affect the website

1.6   Describe what access issues may need to be taken into account

1.7   Describe what file types to use for saving content

1.8   Store and retrieve files effectively, in line with local guidelines and conventions where available

Outcome 2: Use website software tools to prepare content for websites

Assessment Criteria

The learner can:

2.1   Prepare content for web pages so that it is ready for editing and formatting

2.2   Organise and combine information needed for web pages including across different software

2.3   Select and use appropriate editing and formatting techniques to aid both clarity and navigation

2.4   Select and use appropriate development techniques to link information across pages

2.5   Change the file formats appropriately for content

2.6   Check web pages meet needs, using IT tools and making corrections as necessary

Outcome 3: Publish websites

Assessment Criteria

The learner can:

3.1   Select and use appropriate testing methods to check that all elements of websites are working as planned

3.2   Identify any quality problems with websites and how to respond to them

3.3   Select and use an appropriate programme to upload and publish the website

3.4   Respond appropriately to problems with multiple page websites

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Create structures and styles for websites

The learner should be able to and understand:

Content and layout:
- Web page content and layout will vary according to the template, but may include:
    - o   text (eg body text, headings, captions)
    - o   images (eg still photographs, diagrams)
    - o   numbers (eg tables, charts or graphs)
    - o   background (eg colours, gradients, patterns, textures)
    - o   structure (eg frames, side bars)
    - o   moving images (eg constraints of use, animation, video clips)
- Effect of copyright law (eg on music downloads or use of other people's images)
- Acknowledgment of sources, avoiding plagiarism
- Permissions

Website features:
- Web page features will vary, but may include:
    - o   navigation (eg action buttons, links, hot spots, menus, hyperlinks, pop-ups)
    - o   multimedia (eg sound linked to actions, video clips, sound track)
    - o   sound (eg clips linked to navigation, background music, video sound track)

Web page templates:
- Design layout will vary but may include:
    - o   text (eg body text, headings, captions)
    - o   images (eg still photographs, diagrams)
    - o   numbers (eg tables, charts or graphs),
    - o   background (eg colours, gradients, patterns, textures)
    - o   structure (eg frames, side bars)
    - o   moving images (eg animation, video clips)
    - o   sound (eg clips linked to navigation, background music, video sound track)

Web page styles:
- Styles will vary according to the different elements of the website design, but may include:
    - o   typeface (eg font, colour, size and alignment of headings, captions or body text)
    - o   lines (eg type, thickness and colour of borders, tables, diagrams)

Access issues:
- The difficulties different users may have in accessing websites, accessibility guidelines, affect of download speeds (eg from different browser software, connection type, size of web page contents)

File types:
- Text (eg rtf, doc, pdf)
- Images (eg jpeg, tiff, psd)
- Charts and graphs (eg xls)
- Sound (eg wav, MP3)

Store and retrieve:
- Files (eg create, name, open, save, save as, print, close, find, share), file size
- Version control
- Import data, export data
- Folders (eg create, name)

Outcome 2   Use website software tools to prepare content for websites
The learner should be able to and understand:

Combine information:
- Combine images with text (eg photo captions)
- Presentation with audio and/or video; numbers with charts and graphs
- Text alignment, captions, text wrap
- Behind, in front, grouping

Editing techniques:
- Editing techniques will vary in line with the type of information, for example:
  o select, copy, cut, paste, undo, redo, drag and drop, find, replace, size, crop, position, change templates

Development techniques:
- Creating links to bookmark text within a page, linking web pages together, adding a link to another website, altering simple code using programming language

File formats:
- Change format of documents to RTF or HTML

Check web pages:
- Will vary depending on the content but may include, for example:
- Text: spell check; grammar check, type face and size, hyphenation
- Layout: page layout, margins, line and page breaks, tables, frames, sections
- Images: size, alignment and orientation, suitability of file format, appropriate choice of colour mode and use of filters, fitness for purpose of image resolution

Outcome 3   Publish websites
The learner should be able to and understand:

Testing methods:
- Methods will vary but may include:
  o viewing web pages using browser software, testing navigation round pages within multiple page website, testing external links

Problems with websites:
- Problems may vary, but could include:
  o content that is not appropriate for the template or missing
  o text that is not readable or missing
  o images that are oriented or sized wrongly
  o navigation that does not work as planned
  o multimedia features (eg sound levels, image resolution, synchronisation of sound and images)

Upload and publish website:

- Upload content to a template
- Use file exchange programme to upload and publish (eg FTP or HTTP)

Unit 242   Word processing software

Level: 2
Credit value: 4
NDAQ number: R/502/4628

Unit aim

This is the ability to use a software application designed for the creation, editing and production of largely text-based documents. On completion of this unit a candidate should be able to select and use a range of intermediate word processing software tools and techniques to produce documents that are at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.

Word processing tools and techniques will be described as 'intermediate' because:
- the software tools and functions will be at times non-routine or unfamiliar;
- the choice of techniques will need to take account of a number of factors or elements; and
- the user will take some responsibility for the inputting, manipulating and outputting of the information.

Examples of context: Typical documents may include – business letters and invoices with automated content (eg AutoText, mail merge), more complex reports and content for web pages.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1 Enter and combine text and other information accurately within word processing documents
2 Create and modify layout and structures for word processing documents
3 Use word processing software tools to format and present documents effectively to meet requirements

Guided learning hours

It is recommended that 30 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 2 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 242   Word processing software

Outcome 1: Enter and combine text and other information accurately within word processing documents

Assessment Criteria

The learner can:

1.1   Identify what types of information are needed in documents

1.2   Use appropriate techniques to enter text and other information accurately and efficiently

1.3   Select and use appropriate templates for different purposes

1.4   Identify when and how to combine and merge information from other software or other documents

1.5   Select and use a range of editing tools to amend document content

1.6   Combine or merge information within a document from a range of sources

1.7   Store and retrieve document and template files effectively, in line with local guidelines and conventions where available

Outcome 2: Create and modify layout and structures for word processing documents

Assessment Criteria

The learner can:

2.1   Identify the document requirements for structure and style

2.2   Identify what templates and styles are available and when to use them

2.3   Create and modify columns, tables and forms to organise information

2.4   Select and apply styles to text

Outcome 3: Use word processing software tools to format and present documents effectively to meet requirements

Assessment Criteria

The learner can:

3.1   Identify how the document should be formatted to aid meaning

3.2   Select and use appropriate techniques to format characters and paragraphs

3.3   Select and use appropriate page and section layouts to present and print documents

3.4   Describe any quality problems with documents

3.5   Check documents meet needs, using IT tools and making corrections as necessary

3.6   Respond appropriately to quality problems with documents so that outcomes meet needs

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Enter and combine text and other information accurately within word processing documents

The learner should be able to and understand:

Types of information:
- Text, numbers, images, other graphic elements (eg lines, borders)
- Hyperlinks, charts, objects

Keyboard or other input method:
- Keyboard skills: using the full range of keys, typing accurately and efficiently, keyboard shortcuts
- Other input methods: voice recognition, touch screen, stylus

Combine information:
- Insert, size, position, wrap, order, group, link information in a document to another source
- Mail merge documents and labels
- Hyperlinks

Templates:
- Existing templates (eg blank document, fax, letter, web page), create new templates for common documents

Editing tools:
- Editing tools appropriate to the type of information, for example: select, copy, cut, paste, undo, redo, drag and drop, find, replace, insert, delete, size, crop, position

Store and retrieve:
- Files (eg create, name, open, save, save as, print, close, find, share)
- Version control
- Import/export
- File size; folders (eg create, name)

Outcome 2   Create and modify layout and structures for word processing documents

The learner should be able to and understand:

Requirements for structure and style:
- Document layout, house style

Tables and forms:
- Insert and delete cells, rows and columns, adjust row height and column width
- Add and amend table structure, merge cells, complete forms and tables, insert and modify form fields, convert text to table
- Merge and split cells, horizontal and vertical text alignment, cell margin, add borders and shading, sort

Columns:
- Add and delete columns, modify column width, add columns to whole document and part of a page

Styles:
- Heading styles: apply or change existing styles to a word, line, paragraph or section
- Define styles for different elements of common documents

Page layouts:
- Paper size and type, change page orientation, margins, page breaks, page numbering, section breaks
- Header and footer, date and time, adjust page set up for printing

Outcome 3   Use word processing software tools to format and present documents effectively to meet requirements

The learner should be able to and understand:

Format characters:
- Size, font style (typeface), colour, bold, underline, italic, superscript, subscript, special characters and symbols

Format paragraphs:
- Alignment, numbering, line spacing, widows and orphans
- Tabs and indents
- Borders, bullets, shading

Check word processed documents:
- Spell check, grammar check, typeface and size, hyphenation
- Page layout, margins, line and page breaks, tables
- Print preview
- Accuracy, consistency, clarity
- Language and dictionary settings

Quality problems with documents:
- Will vary according to the content, for example:
  - text (eg styles, structure, layout)
  - images (eg size, position, orientation)
  - numbers (eg decimal points, results of any calculations)

Unit 331 Use customer service as a competitive tool

Level: 3
Credit value: 8
NDAQ number: D/601/1228

Unit aim

Customer service contributes to an organisation's competitive position. Customers of many organisations have choice about the services or products they use and who supplies them. Often the technical features and cost of the service or product are almost identical. If this is the case, the quality of the customer service offered makes all the difference about which supplier the customer chooses. This unit is about how the learner can play their part in ensuring that their organisation makes the best possible use of the competitive advantage that can be gained from offering superior customer service. It covers how the learner can use customer service as a tool to compete effectively with other providers of similar services and product. The unit is not for a learner whose organisation does not compete actively with others.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

1 Organise customer service to gain a competitive advantage
2 Deliver a competitive service
3 Understand how to use customer service as a competitive tool

Guided learning hours

It is recommended that 53 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This Unit directly relates to Unit A14 of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

Unit 331   Use customer service as a competitive tool

Outcome 1: Organise customer service to gain a competitive advantage

Assessment Criteria

The learner can:

1.1   develop their own and colleagues' understanding of the services and products offered by their organisation

1.2   define their organisation's service offer and the ways in which it compares with those of their competitors

1.3   set an example for colleagues and present an image to their customers that reinforces their organisation's service offer

1.4   encourage customer service actions that create and develop customer loyalty.

Outcome 2: Deliver a competitive service

Assessment Criteria

The learner can:

2.1   take positive actions and encourage colleagues to take actions that provide individual customers with added value within their organisation's service offer

2.2   remind customers about their service offer and the extra benefit it provides over those of their competitors

2.3   offer additional technical advice to customers within their organisation's service offer

2.4   show awareness of the financial implications of any added value actions that they or their colleagues might offer

2.5   meet customer service targets to ensure that customers see the benefit of dealing with them rather than with a competitor

2.6   re-direct customers to other service providers without offence when their expectations cannot be met by the organisation's service offer

2.7   ensure that customers who have shown a previous interest in repeat and additional services are reminded of this

2.8   encourage colleagues to offer complementary services and products when customer satisfaction indicates that customers would be interested in them.

Outcome 3: Understand how to use customer service as a competitive tool

Assessment Criteria

The learner can:

3.1   identify the factors that lead to customers' belief that they are enjoying value for money

3.2   describe the services and products offered by their organisation

3.3   describe the services and products offered by competitors

3.4   identify the features and benefits of services and products that are seen by customers as added value

3.5   explain the purpose of adding non-chargeable items to the service offer in order to impress customers and develop customer loyalty

3.6   explain how to portray a positive image that reinforces their organisation's competitive position

3.7   explain their organisation's customer service targets and cost implications of added value actions to improve the organisation's competitive position

3.8   describe complementary services and products that may be of interest to their customers.

Evidence requirements

1   Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

2   You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

3   You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

4   You must provide examples of when the benefits of using customer service as a competitive tool enjoyed by customers are:

    a   tangible in that they can be measured

    b   intangible in that they are represented solely by feelings and perceptions of the customer experience.

5   Your evidence must include examples of competitive analysis involving:

    a   direct competitors

    b   competitors offering substitute services or products.

6   Your evidence must include examples of when you have used customer service actions as a competitive tool to attract or maintain:

    a   loyal customers

    b   customers returning from competitors

    c   new customers.

Unit 332 Monitor and solve customer service problems

Level: 3
Credit value: 6
NDAQ number: J/601/1515

Unit aim

The learner's job involves delivering and organising excellent customer service. However good the service provided, some of their customers will experience problems and the learner will spot and solve other problems before their customers even know about them. This Unit is about the part of their job that involves solving immediate customer service problems. It is also about changing systems to avoid repeated customer service problems. Remember that some customers judge the quality of their customer service by the way that the learner solves customer service problems. The learner can impress customers and build customer loyalty by sorting out those problems efficiently and effectively. Sometimes a customer service problem presents an opportunity to impress a customer in a way that would not have been possible if everything had gone smoothly.

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:
1 Solve immediate customer service problems
2 Identify repeated customer service problems and options for solving them
3 Take action to avoid the repetition of customer service problems
4 Understand how to monitor and solve customer service problems

Guided learning hours

It is recommended that 40 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This Unit directly relates to Unit C5 of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

Unit 332   Monitor and solve customer service problems

Outcome 1: Solve immediate customer service problems

Assessment Criteria

The learner can:

1.1   respond positively to customer service problems following organisational guidelines

1.2   solve customer service problems when they have sufficient authority

1.3   work with others to solve customer service problems

1.4   keep customers informed of the actions being taken

1.5   check with customers that they are comfortable with the actions being taken

1.6   solve problems with service systems and procedures that might affect customers before customers become aware of them

1.7   inform managers and colleagues of the steps taken to solve specific problems.

Outcome 2: Identify repeated customer service problems and options for solving them

Assessment Criteria

The learner can:

2.1   identify repeated customer service problems

2.2   identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option

2.3   work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of the organisation.

Outcome 3: Take action to avoid the repetition of customer service problems

Assessment Criteria

The learner can:

3.1   obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated

3.2   action their agreed solution

3.3   keep their customers informed in a positive and clear manner of steps being taken to solve any service problems

3.4   monitor the changes they have made and adjust them if appropriate.

Outcome 4: Understand how to monitor and solve customer service problems

Assessment Criteria

The learner can:

4.1   Describe organisational procedures and systems for dealing with customer service problems

4.2   describe the organisational procedures and systems for identifying repeated customer service problems

4.3   explain how the successful resolution of customer service problems contributes to customer loyalty with the external customer and improved working relationships with service partners or internal customers

4.4   explain how to negotiate with and reassure customers while their problems are being solved.

Evidence requirements

1   Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

2   You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

3   You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

4   Your evidence must include examples of problems which are:

a   brought to your attention by customers

b   are identified first by you and/or by a colleague.

5   The problems included in your evidence must include examples of a:

a   difference between customer expectations and what is offered by your organisation

b   problem resulting from a system or procedure failure

c   problem resulting from a shortage of resources or human error.

6   You must show that you have considered the options for solving problems from the point of view of:

a   your customer

b   the potential benefits to your organisation

c   the potential risks to your organisation.

7   You must provide evidence that you have made use of options that:

        a   follow organisational procedures or guidelines

        b   make agreed and authorised exceptions to usual practice.

Unit 333 Bespoke software

Level: 3
Credit value: 4
NDAQ number: J/502/4397

Unit aim

This is the ability to select and use a suitable bespoke software application to carry out an appropriate data processing task. It includes understanding the capabilities of the software and the types of tasks for which it is suitable, as well as the skills and techniques needed to use the software application appropriately and effectively. On completion of this unit a candidate should be able to select and use a range of advanced bespoke software tools and techniques for complex or non-routine information.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1 Input and combine information using bespoke software
2 Create and modify appropriate structures to organise and retrieve information efficiently
3 Exploit the functions of the software effectively to process and present information

Guided learning hours

It is recommended that 30 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 3 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 333   Bespoke software

Outcome 1: Input and combine information using bespoke software

Assessment Criteria

The learner can:

1.1   Input relevant information accurately so that it is ready for processing

1.2   Select and use appropriate techniques to link and combine information within the application and across different software applications

Outcome 2: Create and modify appropriate structures to organise and retrieve information efficiently

Assessment Criteria

The learner can:

2.1   Evaluate the use of software functions to structure, layout and style information

2.2   Create, change and use appropriate structures and/or layouts to organise information efficiently

2.3   Manage data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data where available

Outcome 3: Exploit the functions of the software effectively to process and present information

Assessment Criteria

The learner can:

3.1   Select and use appropriate tools and techniques to edit, analyse and format information

3.2   Check information meets needs, using IT tools and making corrections as necessary

3.3   Identify and respond appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs

3.4   Select and use presentation methods to aid clarity and meaning

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Input and combine information using bespoke software

The learner should be able to and understand:

Types of bespoke information:

Information will vary according to the software for example, text, numbers, photos, scanned images, graphic elements, digital recorded sound, graphs, charts, tables

Inputting information:
- Inputting tools and techniques will vary according to the technology being used for example:
  - interface devices (eg keyboard, mouse, stylus, touch screen)
  - microphone (eg headset, built-in)
  - camera (eg web cam, video camera, mobile phone camera)
  - shortcuts, customise keys

File types and software:
- Text (eg rtf, doc, pdf)
- Images (eg jpeg, tiff, psd)
- Charts and graphs (eg xls)
- Sound (eg wav, MP3)

Combining information techniques:
- Insert, size, position, wrap, order, group
- Links and references to external data
- Version control
- Import data, export data

Outcome 2   Create and modify appropriate structures to organise and retrieve information efficiently
The learner should be able to and understand:

Structures, layouts and conventions:
- Apply and change existing templates, set up templates for common information
- Apply or change existing styles, set up styles for information

Manage data files:
- File storage, data import and export, restore lost data
- Identify ineffective backup storage

Guidelines for the storage and use of data:
- Set by employer or organisation or centre
- Policies relating to security, backup and data protection
- Guidelines for data format
- Compliance, audit and reporting requirements
- File management will vary according to the application

Outcome 3   Exploit the functions of the software effectively to process and present information
The learner should be able to and understand:

Editing, analysis and formatting techniques:
- Techniques will vary according to the software and task, for example:
  - Editing: select, insert, delete, cut, copy, paste, drag and drop, find, replace, page layout, labelling, alignment, orientation, colour, resolution, size, pitch
  - Analysis: design queries, mathematical, logical or statistical functions
  - Formatting: characters, lines, paragraphs, pages, file type

Check information:
- Checks will vary according to the type of information and software, but could include:
    - spell check, grammar check
    - accuracy of figures
    - labelling and size of images
    - volume of sound
    - quality of images and sound
    - line, paragraph and page breaks fall appropriately
    - formatting is consistent, the use of headings and subheadings aid clarity
    - the placing of images or sound clips

Quality problems with outcomes:
- Will vary according to the content, for example:
    - text (eg formatting, structure)
    - images (eg size, position, orientation)
    - numbers (eg decimal points, accuracy of calculations)
    - sound (eg volume, sound clip out of sync)

Presentation methods:
- Methods will vary according to the software and task, for example:
    - on screen display, publishing on a web site, hard copy print out, digital file
- Organisational house style, branding

Unit 334   Data management software

Level: 3
Credit value: 4
NDAQ number: A/502/4560

Unit aim

This is the ability to use a software application designed to store and retrieve data needed for a variety of business functions. It also includes an understanding of the features and facilities of the software and the purpose for which the data is stored.

An advanced user can select and use advanced data management software tools and techniques efficiently to:
 • enter complex information;
 • retrieve information using complex selection criteria;
 • produce customised reports from the system; and
 • set up menus or short cuts.

The data management system tools, functions and techniques will be described as 'advanced' because:
 • the software tools and functions involved will be complex and at times involve having the idea that there may be a tool or function to do something (eg improve efficiency or create an effect), exploring technical support, self-teaching and applying; and
 • the input, manipulation and output techniques involved will be complex, which will involve research, identification and application.

Examples of context: Working with the software manufacturer or IT professional to develop and implement new data handling techniques; Examples of customisation includes: additional product training; creation of process triggers and workflow; assistance writing reports; complex data extracts; or implementing Business Intelligence.

Learning outcomes

There are **two** learning outcomes to this unit.

The learner will:
 1 Enter, edit and maintain data records in a data management system
 2 Retrieve and display data records to meet requirements

Guided learning hours

It is recommended that 30 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 3 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 334   Data management software

Outcome 1: Enter, edit and maintain data records in a data management system

Assessment Criteria

The learner can:

1.1   Discuss when and how to change or create a new data entry form

1.2   Enter data accurately into records to meet requirements

1.3   Configure characteristics of groups of records

1.4   Discuss and explain how to locate and amend data records

1.5   Check data records meet needs, using IT tools and making corrections as necessary

1.6   Interpret and respond appropriately to a range of data and application error messages

1.7   Evaluate and explain the risks to data security and procedures used for data protection

1.8   Manage data files effectively, in line with local and/or legal guidelines for the storage and use of data where available

Outcome 2: Retrieve and display data records to meet requirements

Assessment Criteria

The learner can:

2.1   Determine and explain what queries and reports need to be run to output the required information

2.2   Create and use queries to search for and retrieve information from the system

2.3   Create, define and set up reports to output information to meet requirements

2.4   Use the file handling techniques of the software to import and export data

2.5   Use available techniques to combine and link data

Teaching guidance

The learner should be able to understand:

Benefits of data management system:
- Accessible, reliable, rapid access
- Shared view, up-to-date, accurate, secure
- Simplifies data handling
- Constraints of using system, audit trail

Enter data:
- Use of data entry form, create new record, add record to table
- Select and update fields, groups of records

Record characteristics:
- Attributes, categories, teams, flags, keys

Check data:
- Spell check, format, consistency, remove duplication
- Verify data; data validation techniques
- Record housekeeping

Error messages:
- Data entry: due to field size, data type, validation checks, duplicate records, format
- Using help
- Troubleshooting; logging, reporting and dealing with application errors
- System access

Security risks and procedures:
- Access control
- Authorised use, password protection and management, user authentication
- Manage data files:
- File storage, data import and export, restore lost data
- Identify ineffective backup storage

Guidelines for the storage and use of data:
- Set by employer or organisation or centre
- Policies relating to security, backup and data protection
- Guidelines for data format
- Compliance, audit and reporting requirements
- File management will vary according to the application.

Outcome 2   Retrieve and display data records to meet requirements
The learner should be able to and understand:

Reports:
- Customised reports
- Define report parameters: for self and others
- System reports
- Errors in reports

Search and retrieve:
- Alphanumeric sort, filter, multiple criteria, cross-tabulate data
- Queries to update and amend data
- Logical operators

Import and export data:
- To other systems or software
- File formats
- Mail merge
- Data migration
- Data archiving

Unit 335 Database software

Level: 3
Credit value: 6
NDAQ number: T/502/4556

Unit aim

This is the ability to use a software application designed to organise and store structured information and generate reports.

On completion of this unit a candidate should be able to select and use advanced database software tools and techniques efficiently to:

- enter complex information into databases;
- retrieve information by creating queries using multiple selection criteria; and
- produce reports by setting up menus or short cuts.

They will also be able to design, create and interrogate multiple-table relational databases.

Database tools, functions and techniques will be described as 'advanced' because:

- the software tools and functions involved will be complex and at times require new learning, which will involve having the idea that there may be a tool or function to do something (eg improve efficiency or create an effect), exploring technical support, self-teaching and applying; and
- the input, manipulation and output techniques involved will be complex, which will involve research, identification and application.

Examples of context: Typical 'more complex' reports from multiple-table relational databases may be about – customers' buying methods, order frequency and payment patterns.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

1. Plan, create and modify relational database tables to meet requirements
2. Enter, edit and organise structured information in a database
3. Use database software tools to create, edit and run data queries and produce reports

Guided learning hours

It is recommended that 45 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 3 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 335   Database software

Outcome 1: Plan, create and modify relational database tables to meet requirements

Assessment Criteria

The learner can:

1.1   Explain how a relational database design enables data to be organised and queried

1.2   Plan and create multiple tables for data entry with appropriate fields and properties

1.3   Set up and modify relationships between database tables

1.4   Explain why and how to maintain data integrity

1.5   Respond appropriately to problems with database tables

1.6   Use database tools and techniques to ensure data integrity is maintained

Outcome 2: Enter, edit and organise structured information in a database

Assessment Criteria

The learner can:

2.1   Design and create forms to access, enter, edit and organise data in a database

2.2   Select and use appropriate tools and techniques to format data entry forms

2.3   Check data entry meets needs, using IT tools and making corrections as necessary

2.4   Respond appropriately to data entry errors

Outcome 3: Use database software tools to create, edit and run data queries and produce reports

Assessment Criteria

The learner can:

3.1   Explain how to select, generate and output information from queries according to requirements

3.2   Create and run database queries to display, amend or calculate selected data

3.3   Plan and produce database reports from a multiple-table relational database

3.4   Select and use appropriate tools and techniques to format database reports

3.5   Check reports meet needs, using IT tools and making corrections as necessary

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Plan, create and modify relational database tables to meet requirements

The learner should be able to and understand:

Database design:
- What types of information are stored
- Use of data entry form
- Routine queries
- How data is structured in a single table non-relational database
- Use of indexes and key field to organise data
- How relationships are established in a multiple-table database
- How data is structured in a multiple-table database
- What logical operators are and how to use them
- Schema

Field characteristics:
- Data type, field name, field size, field format, validation
- Primary and secondary keys
- Lookup tables

Relationships between database tables:
- One to one, one to many, many to many

Data integrity:
- Unique not null primary key
- Field characteristics
- Data validation, consistency, completeness, accuracy
- Effect of malicious or accidental alteration
- Methods for maintaining integrity of data in a multiple table database
- Referential integrity, foreign keys

Problems with database tables:
- Redundant data, duplication, table structure, field characteristics and validation
- Sources of help
- Access control
- Data type, indexing
- Analytical tools

Outcome 2   Enter, edit and organise structured information in a database

The learner should be able to and understand:

Enter, edit and organise data:
- Select and update fields
- Create new records
- Locate and amend records: using wildcards, search operators

Format data entry forms:
- Field characteristics and layout, tables, colour, lookups, styles , subforms

Check data entry:
- Spell check, format
- Accuracy, consistency, completeness, validity
- Security
- Fitness for purpose

Data entry errors:
- Due to field size, data type, validation checks
- Using help: deal with data that does not fit parameters, alerts, reminders; problems with forms

Outcome 3   Use database software tools to create, edit and run data queries and produce reports
The learner should be able to and understand:

Database queries:
- Alphanumeric sort, filter, single criteria, multiple criteria
- Save queries and output, cross-tabulate data
- Queries to update and amend data
- Logical operators

Database reports:
- Using menus, wizards or shortcuts
- Selected fields, selected records

Formatting database reports:
- Data fields
- Page and section layout
- Add text or images
- Adjust page setup for printing, styles

Check data entry:
- Completeness, accuracy
- Sorting, formatting, layout,
- Security, fitness for purpose

Unit 336   Improving productivity using IT

Level: 3
Credit value: 5
NDAQ number: L/502/4157

Unit aim

This is the ability to plan, evaluate and improve procedures involving the use of IT tools and systems to improve the productivity and efficiency of tasks and activities. On completion of this unit the candidate should be able to plan and review their use of predefined or commonly used IT tools for activities most of which are complex and non-routine. They will be able to devise solutions to use IT tools to improve productivity, as well as take considerable responsibility and autonomy being prepared to offer support and advice to others.

Examples of context: An improvement may be adapting an off-the-shelf solution to create a bespoke database to manage customer relationships in a marketing context.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1   Plan, select and use appropriate IT systems and software for different purposes
2   Evaluate the selection and use of IT tools to make sure that activities are successful
3   Devise solutions to improve the use of IT tools and systems for self and others

Guided learning hours

It is recommended that 40 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 3 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 336 Improving productivity using IT

Outcome 1: Plan, select and use appropriate IT systems and software for different purposes

Assessment Criteria

The learner can:

1.1 Explain the purpose for using IT

1.2 Analyse the methods, skills and resources required to complete the task successfully

1.3 Analyse any factors that may affect the task

1.4 Critically compare alternative methods to produce the intended outcome

1.5 Develop plans for using IT for different tasks and purposes, including contingencies

1.6 Select IT systems and software applications as appropriate to purposes and use them to produce effective outcomes

1.7 Explain why different software applications could be chosen to suit different tasks, purposes and outcomes

1.8 Explain any legal or local guidelines or constraints which apply to the task or activity

Outcome 2: Evaluate the selection and use of IT tools to make sure that activities are successful

Assessment Criteria

The learner can:

2.1 Critically compare the strengths and weaknesses of own and other people's final work

2.2 Review ongoing use of IT tools and techniques and change the approach as needed

2.3 Evaluate and test solutions to make sure they match requirements and are fit for purpose

2.4 Be prepared to give feedback on other people's selection and use of IT tools

2.5 Explain different ways to make further improvements to work

Outcome 3: Devise solutions to improve the use of IT tools and systems for self and others

Assessment Criteria

The learner can:

3.1 Evaluate the productivity and efficiency of IT systems and procedures used by self and others

3.2 Research and advise on ways to improve productivity and efficiency

3.3 Develop solutions that make a demonstrable improvement to the use of IT tools and systems

3.4 Test solutions to ensure that they work as intended

3.5 Recommend improvements to IT systems and procedures that increase productivity

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Plan, select and use appropriate IT systems and software for different purposes

The learner should be able to and understand:

Purposes for using IT:
- Who and what the information is for
- When it must be finished
- What information needs to be included
- Where it will be used (on screen, sent to others, printed)

Factors that may affect the task:
- Access to information
- Steps that need to be taken in advance
- Availability of time, budget and resources
- Audience need

Reasons for choosing IT:
- Time, convenience, cost; benefits of IT or manual methods of preparing, processing, presenting and managing information
- Convenience and effectiveness at meeting needs, quality, accuracy
- How IT can make tasks easier than other methods, streamline business processes, increase productivity, return on investment
- Any difficulties people have in using IT

Legal or local guidelines or constraints may include:
- Data protection, copyright, software licensing
- Security
- Organisational house-style or brand guidelines
- Local guidelines for working with IT and storage of information

Outcome 2   Evaluate the selection and use of IT tools to make sure that activities are successful

The learner should be able to and understand:

Strengths and weaknesses of final work:
- Format, layout
- Accuracy
- Clarity for audience
    - Structure ,style
    - Quality, efficiency

Review use of IT tools:
- Evaluate whether the IT tools and techniques are appropriate to the task and intended outcome
- Run user tests
- Compare with other IT tools and techniques
- Find ways to optimise the choice and approach

Improvements to work:
- Correct mistakes
- Avoid affecting other people's work
- More efficient and effective ways of doing things, learning new techniques
- Ways to improve others' or organisational efficiency

Give feedback:
- Strengths, weaknesses, potential improvements

Outcome 3   Devise solutions to improve the use of IT tools and systems for self and others

The learner should be able to and understand:

Ways to improve productivity and efficiency:
- Save time
- Save money
- Streamline work processes
- Increase output
- Improve quality of outputs
- Total cost of solution
- Business benefit

Develop solutions:
- Set up short cuts
- Customise interface
- Record macros
- Create templates
- Create style guides
- Streamline business processes

Unit 337   IT security for users

Level: 3
Credit value: 3
NDAQ number: D/502/4258

Unit aim

This is the ability to protect hardware, software malfunction and unauthorised access. On completion of this unit the candidate should be able to monitor potential risks and take steps to protect their own and others' systems, data and software (eg from unauthorised remote access, disaster recovery or contingency planning).

Examples of context: Develop backup and security guidelines for others to follow. Setting up a backup and recovery plan for a small business running a peer to peer network. In larger organisations, aspects relating to security policy and practice at Level 3 may be the responsibility of IT professionals.

Learning outcomes

There is **one** learning outcome to this unit.

The learner will:
    1   Select, use and develop appropriate procedures to monitor and minimise security risk to IT systems and data

Guided learning hours

It is recommended that 20 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 3 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 337   IT security for users

Outcome 1: Select, use and develop appropriate procedures to monitor and minimise security risk to IT systems and data

Assessment Criteria
The learner can:

1.1   Evaluate the security issues that may threaten system performance

1.2   Select, use and evaluate a range of security precautions to protect IT systems and monitor security

1.3   Evaluate the threats to system and information security and integrity

1.4   Manage access to information sources securely to maintain confidentiality, integrity and availability of information

1.5   Explain why and how to minimise security risks to hardware, software and data for different users

1.6   Apply, maintain and develop guidelines and procedures for the secure use of IT

1.7   Select and use effective backup and archiving procedures for systems and data

Teaching guidance
The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Select, use and develop appropriate procedures to monitor and minimise security risk to IT systems and data
The learner should be able to and understand:

Threats to system performance:
Unwanted e-mail (often referred to as "spam"), malicious programs (including viruses, worms, trojans, spyware, adware and rogue diallers) and hackers; hoaxes; vulnerability

Security precautions:
- Use access controls
- Configure anti-virus software, adjust firewall settings, adjust internet security settings; carry out security checks, report security threats or breaches; backup; store personal data and software safely; treat messages, files, software and attachments from unknown sources with caution; proxy servers; download security software patches and updates; effectiveness of security measures;

Threats to information security:
- From theft, unauthorised access, accidental file deletion, use of removable storage media; malicious programs (including viruses, worms, trojans, spyware, adware and rogue diallers), hackers, phishing and identity theft
- Uunsecured and public networks, default passwords and settings, wireless networks, Bluetooth, portable and USB devices

Access to information sources:
- Username and password/PIN selection and management, online identity/profiles
- Respect confidentiality, avoid inappropriate disclosure of information
- Digital signatures, data encryption, security classification, preserve availability

Minimise risk:
- Access controls: physical controls, locks, passwords, access levels, data protection, data retention.
- Security measures: anti-virus software, firewalls, security software and settings
- Risk assessment: anti-spam software, software updates
- Risk management: user profiles, operating system settings, user authentication (ID cards, smart cards, biometrics)
- Risks associated with widespread use of technology

Security guidelines and procedures:
- Set by: employer or organisation or centre
- Privacy, laws and regulations
- Disaster recovery plans, contingency systems, dealing with security breaches, backup procedures; administrative procedures and controls

Unit 338 Presentation software

Level: 3
Credit value: 6
NDAQ number: T/502/4623

Unit aim

This is the ability to use software applications to produce effective presentations, which include a combination of media (eg images, animation and sound) for education, entertainment or information sharing.

On completion of this unit a candidate should be able to select and use a wide range of advanced presentation software tools and techniques effectively to produce presentations that are complex or non-routine.

Presentation tools and techniques will be described as 'advanced' because:
- the software tools and functions used will be complex and at times require new learning, which will involve having the idea that there may be a tool or function to do something (eg improve efficiency or create an effect), exploring technical support, self-teaching and applying;
- the inputting, manipulating and outputting techniques will be complex, and will involve research, identification and application; and
- the user will take full responsibility for inputting, structuring, editing and presenting the information.

Examples of context: An interactive or multi-media presentation.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1 Input and combine text and other information within presentation slides
2 Use presentation software tools to structure, edit and format presentations
3 Prepare interactive slideshow for presentation

Guided learning hours

It is recommended that 45 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 3 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 338 Presentation software

Outcome 1: Input and combine text and other information within presentation slides

Assessment Criteria

The learner can:

1.1 Explain what types of information are required for the presentation

1.2 Enter text and other information using layouts appropriate to type of information

1.3 Insert charts and tables and link to source data

1.4 Insert images, video or sound to enhance the presentation

1.5 Identify any constraints which may affect the presentation

1.6 Organise and combine information for presentations in line with any constraints

1.7 Store and retrieve presentation files effectively, in line with local guidelines and conventions where available

Outcome 2: Use presentation software tools to structure, edit and format presentations

Assessment Criteria

The learner can:

1.1 Explain when and how to use and change slide structure and themes to enhance presentations

2.2 Create, amend and use appropriate templates and themes for slides

2.3 Explain how interactive and presentation effects can be used to aid meaning or impact

2.4 Select and use appropriate techniques to edit and format presentations to meet needs

2.5 Create and use interactive elements to enhance presentations

2.6 Select and use animation and transition techniques appropriately to enhance presentations

Outcome 3: Prepare interactive slideshow for presentation

Assessment Criteria

The learner can:

3.1 Explain how to present slides to communicate effectively for different contexts

3.2 Prepare interactive slideshow and associated products for presentation

3.3 Check presentation meets needs, using IT tools and making corrections as necessary

3.4 Evaluate presentations, identify any quality problems and discuss how to respond to them

3.5 Respond appropriately to quality problems to ensure that presentations meet needs and are fit for purpose

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Input and combine text and other information within presentation slides
The learner should be able to and understand:

Types of information:
- Text, numbers, images, graphics, sound, video, animated sequences

Images, video or sound for presentations:
- Clip-art, photo, scanned images, borders, create diagrams or graphics
- Image formats: pre-recorded audio/video clips, capturing audio or video, audio and video formats

Charts and tables for presentations:
- Table, pie chart, graph, diagram, organisational chart, flowchart; linked and embedded spreadsheet elements

Combine information for presentations:
- Combine images, charts, tables with text by inserting, re-sizing and positioning
- Use of text boxes, presentation with audio and/or video, import information produced using other software
- Reference external information with hyperlinks, object linking or embedding
- Merge versions or slides from different files or users

Constraints:
- On content: copyright law (eg on music downloads or use of other people's images), acknowledgment of sources, avoiding plagiarism
- Equal opportunities, other local guidelines
- On delivery (eg environment, timing)

Store and retrieve:
- Save, save as, find, open, close; naming protocols
- Reducing file size; save presentation as a stand alone show or as web pages, formats for export
- File properties, password protection

Outcome 2   Use presentation software tools to structure, edit and format presentations
The learner should be able to and understand:

Slide structure:
- Layout, templates, design and style, organisational guidelines
- Adapt and create new templates

Presentation effects:
- Video, sound, animation, slide transitions, visual and sound effects, hyperlinks
- Interactive elements

Edit presentation:
- Size, crop and position objects
- Wrap text; add captions and graphic elements
- Slide order; change orientation
- Animation and transition effects:
- Adding and removing hyperlinks
- Apply and create transitions, apply animations, action buttons

Format slides:
- Bullets, numbering, line spacing, alignment, colour, fonts, size, backgrounds, colour schemes, master slides, themes

Outcome 3   Prepare interactive slideshow for presentation
The learner should be able to and understand:

Present slides:
- Timing, content, meaning
- Organisation of information
- Audience needs
- Location, contexts

Prepare slides:
- View and re-order slides
- Rehearse timing and effects
- Set up and amend slide show settings
- Print slides, handouts, speaker notes
- Export formats

Check presentations:
- Spell check; grammar check, word count, orientation, layout, slide order, text alignment and formatting, accuracy, clarity, transitions and timings
- Choice and suitability of effects, actions and links

Quality problems with presentations:
- Will vary according to the content, for example:
    o Text: formatting, styles, structure
    o Images: size, position, orientation, unwanted content
    o Effects: timing, brightness, contrast, sound levels, wrong order of animations, action buttons that do not work, sound clip out of sync

Unit 339 Set up an IT system

Level: 3
Credit value: 5
NDAQ number: R/502/4211

Unit aim

This unit is about the ability to safely set up the components of an IT system (eg personal computer - PC, keyboard, mouse and printer), removable storage media (eg data stick or external DVD drive), communication service to access the Internet and associated software and check that they are working properly. On completion of this unit the candidate should be able to select and connect up an IT system with a range of hardware, removable storage media and a communication service safely and successfully and is able to help others to do so.

Examples of context: Re-configuring a PC after a new hard disk has been installed.

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:
1 Select and connect up a personal computer safely with associated hardware and storage media to meet needs
2 Select and connect IT system to a communication service successfully to meet needs
3 Install and configure operating system and application software for use
4 Check that the IT system and communication service are working successfully

Guided learning hours

It is recommended that 40 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 3 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 339   Set up an IT system

Outcome 1: Select and connect up a personal computer safely with associated hardware and storage media to meet needs

Assessment Criteria

The learner can:

1.1   Explain the reasons for choosing different system components and how to avoid any compatibility issues between hardware and software

1.2   Explain any health and safety issues associated with setting up an IT system

1.3   Explain the characteristics of IT systems that affect performance

1.4   Select and connect up the components of an IT system safely, including any peripheral devices and storage media

Outcome 2: Select and connect IT system to a communication service successfully to meet needs

Assessment Criteria

The learner can:

2.1   Explain the reasons for choosing a communication service

2.2   Explain what effect variations in data transmission speed may have

2.3   Select and connect communication hardware safely to an IT system

2.4   Select and connect to a communication service from an IT system

2.5   Explain the factors which influence choice of Internet Service Providers

Outcome 3: Install and configure operating system and application software for use

Assessment Criteria

The learner can:

3.1   Configure the user interface to meet needs

3.2   Explain what security precautions need to be addressed for the system to be used securely online by several users

3.3   Install, set up and configure virus protection and other security systems and software

3.4   Explain the benefits and risks of using disk partitions or other backup locations

3.5   Establish a backup routine for data and system

3.6   Install, set up and configure application software to meet needs

Outcome 4: Check that the IT system and communication service are working successfully

Assessment Criteria

The learner can:

4.1   Explain what system tests and communication tests are needed and why

4.2   Select and run suitable tests to make sure that the system and communication service are working successfully

4.3   Explain the range of help and troubleshooting facilities available to solve problems

4.4   Establish procedures for recovery in the event of system faults or failure

4.5   Respond to faults and error messages and use help and troubleshooting facilities to determine and take appropriate action

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Select and connect up a personal computer safely with associated hardware and storage media to meet needs

The learner should be able to and understand:

Compatibility issues:
- What problems can occur when hardware, software and operating systems are not compatible;
- Why compatibility standards are needed

Health and safety issues:
- Health and safety issues: risks from hardware, electrical connection risks and guidelines, use and disposal of cleaning materials, handling equipment
- Risks to self and others from using hardware; health and safety point of contact

IT system performance:
- Processor speed, memory size, storage capacity, network capability; graphics; display adapter

IT system components:
- Will vary according to the set up, for example: personal computer or other systems, monitor, keyboard, mouse (or other pointing device)

Peripheral devices:
- Speakers, modem, scanner, games console, joystick; TV, data projector, white board
- Plug and play devices
- Customised setup routines
- Printer and other device drivers

Storage media:
- Disk, CD/DVD, data/memory stick, media card, mobile device, removable hard drive
- Customised setup routines
- Backup media

Reasons for choosing storage media:
- Performance, capacity, accessibility, portability, security

Outcome 2   Select and connect IT system to a communication service successfully to meet needs
The learner should be able to and understand:

Communication hardware:
- Router, modem, mobile data device, wireless router
- Cables, power supply
- USB. parallel, serial connections

Communication service:
- Broadband, dial up, wireless, network, mobile device
- ISP, IP configuration

Data transmission speed:
- Which combinations of hardware and software offer very fast or slower data transmission speeds
- Download capacity
- How much speeds in transmitting, receiving and sending data may vary

Outcome 3   Install and configure operating system and application software for use
The learner should be able to and understand:

User interface:
- Operating system, date, time, language settings
- Set up administrator and user accounts
- Desktop shortcuts, customise start-up; memory usage
- Power management

Security systems:
- Firewall, spyware, anti-spam software

System backup:
- Disk partition, removable storage, disk or tape rotation, system restore points, physical location of backup

Set up files and software applications:
- Software licence; installation disks; manuals
- Customised settings for operating system
- Map network drive
- Register software
- Download software, custom installations

Outcome 4   Check that the IT system and communication service are working successfully
The learner should be able to and understand:

System tests:
- Hardware and software

- Check printer and printer drivers, print test pages
- Check files are saved on storage media
- Open and close applications – including accessing across a network
- Open and close files – including accessing across a network
- Certificates and labelling
- De-frag, delete unwanted system files
- Check backup strategy
- Restore system files, restore data files

Communication tests:
- Send and receive test email
- Navigate to ISP website
- Ping IP address; check transmission speed

Recovery procedures:
- Logs and records of system components and licensed software
- Boot disk; system restore and backup

Unit 340   Spreadsheet software

Level: 3
Credit value: 6
NDAQ number: J/502/4626

Unit aim

This is the ability to use a software application designed to record data in rows and columns, perform calculations with numerical data and present information using charts and graphs.

On completion of this unit a candidate should be able to select and use a wide range of advanced spreadsheet software tools and techniques to produce, present and check complex and non-routine spreadsheets.

Spreadsheet software tools and techniques will be defined as 'advanced' because:

- the range of data entry, manipulation and outputting techniques will be complex and non-routine;

- the tools, formulas and functions needed to analyse and interpret the required information require complex and non-routine knowledge and understanding (for example, data restrictions, data validation using formula, pivot tables, data maps); and

- the user will take full responsibility for setting up and developing the functionality of the spreadsheet.

Examples of context: Typical examples may include - cost benefit analysis, analysis of results from a questionnaire or survey, developing summary reports from a large data set, creating a personalised customer quotation from a standard price list.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:

1   Use a spreadsheet to enter, edit and organise numerical and other data
2   Select and use appropriate formulas and data analysis tools and techniques to meet requirements
3   Use tools and techniques to present, and format and publish spreadsheet information

Guided learning hours

It is recommended that 45 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 3 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 340   Spreadsheet software

Outcome 1: Use a spreadsheet to enter, edit and organise numerical and other data

Assessment Criteria

The learner can:

1.1   Identify what numerical and other information is needed in the spreadsheet and how it should be structured

1.2   Enter and edit numerical and other data accurately

1.3   Combine and link data from different sources

1.4   Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available

Outcome 2: Select and use appropriate formulas and data analysis tools and techniques to meet requirements

Assessment Criteria

The learner can:

2.1   Explain what methods can be used to summarise, analyse and interpret spreadsheet data and when to use them

2.2   Select and use a wide range of appropriate functions and formulas to meet calculation requirements

2.3   Select and use a range of tools and techniques to analyse and interpret data to meet requirements

2.4   Select and use forecasting tools and techniques

Outcome 3: Use tools and techniques to present, and format and publish spreadsheet information

Assessment Criteria

The learner can:

3.1   Explain how to present and format spreadsheet information effectively to meet needs

3.2   Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets effectively

3.3   Select and use appropriate tools and techniques to generate, develop and format charts and graphs

3.4   Select and use appropriate page layout to present, print and publish spreadsheet information

3.5   Explain how to find and sort out any errors in formulas

3.6   Check spreadsheet information meets needs, using IT tools and making corrections as necessary

3.7   Use auditing tools to identify and respond appropriately to any problems with spreadsheets

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Use a spreadsheet to enter, edit and organise numerical and other data

The learner should be able to and understand:

Numerical and other data:
- Numbers, charts, graphs, text, images, linked and embedded objects, references, lists

Spreadsheet structure:
- Spreadsheet components (eg cells, rows, columns, tabs, pages, charts, ranges, workbooks, worksheets), structure, design and layout
- Spreadsheet templates

Enter and edit:
- Insert data into single and multiple cells , clear cells, edit cell contents, replicate data, find and replace, add and delete rows and columns, use absolute and relative cell references, add data and text to a chart, hide and protect cells, create, modify and merge multiple copies of a shared workbook
- Data validation
- Shortcuts
- Data entry forms, lists

Combine and link data:
- Across worksheets and files
- Consolidate data
- Shared or collaborative workspaces

Store and retrieve:
- Save, save as, find, open, close, open CSV file in spreadsheet application, save spreadsheet file as CSV; templates
- Selective data import and export; file properties
- Password protection

Outcome 2   Select and use appropriate formulas and data analysis tools and techniques to meet requirements

The learner should be able to and understand:

Analysis and interpretation methods:
- Totals, sub-totals and summary data, automatic sub-totals, group and outline
- Sorting and display order; lists, tables, graphs and charts
- Filter rows and columns
- Forms, data restrictions, data validation, adding messages to data, using formulae to determine valid entries for cells
- Displaying by interest
- Pivot tables and charts
- Judgment of when and how to use these methods
- Functions and formulas:

Design of formulas to meet calculation requirements:
*   Mathematical, statistical, financial, logical, look-up, arguments, arrays and formulas for validating data

Forecasting tools:
*   What-if scenarios, goal seek
*   Data tables
*   Views

Outcome 3   Use tools and techniques to present, and format and publish spreadsheet information
The learner should be able to and understand:

Browser tools:
*   Enter, back, forward, refresh, history, bookmark, new window, new tab

Format cells:
*   Numbers, currency, percentages, number of decimal places, font and alignment, borders and shading
*   Date and time
*   Custom formats
*   Conditional formatting
*   Styles, cell protection
*   Workbook protection
*   Format rows and columns:
*   Height, width, borders and shading, hide, freeze

Format charts and graphs:
*   Chart type (including custom types, 2 graphs types on 1 axis);
    o   title, axis titles, legend, change chart type, move and resize chart, axis scale, annotation, layout, pivot table reports

Page layout:
*   Size, portrait, landscape, margins, header and footer, page breaks, page numbering, date and time, adjust page set up for printing
*   Selective printing or publishing of spreadsheet information

Check spreadsheet information:
*   Accuracy of numbers, formulas and any text; suitability of charts and graphs; reveal formulae; layout and formatting, validity, relevance and accuracy of analysis, interpretation of calculations and results
*   Clarity of overall spreadsheet
*   Check links

Problems with spreadsheets:
*   Using help; sorting out errors in formulas, calculations and results
*   data validation, locate invalid data

Unit 341   Using collaborative technologies

Level: 3
Credit value: 6
NDAQ number: T/502/4380

Unit aim

This is the ability to use IT tools and devices for collaborative working and communications, such as web or video conferencing, instant messaging/chat, online phone and video calls; online forums, social networking sites, wikis and other centralised depositories for documents, blogging, RSS and data feeds, bulk SMS or online work management tools.

On completion of this unit a candidate should be able to manage and effectively integrate and facilitate the safe use of multiple IT tools and devices so that groups can work collaboratively and effectively by:

- setting and implementing guidelines for using collaborative technologies;
- integrating IT tools and devices and creating environments to exploit their potential;
- managing risks, permissions and data flow; and
- moderating and solving complex problems with the use of collaborative technologies;

Examples of context: Typical collaborative activities may include – developing guidelines and instructions for a work team about the use of social networking; moderating online conference sessions or web discussion groups for a professional community of interest.

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

1. Stay safe and secure when working with collaborative technology
2. Plan and set up IT tools and devices for collaborative working
3. Prepare collaborative technologies for use
4. Manage tasks using collaborative technologies

Guided learning hours

It is recommended that 45 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 3 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 341   Using collaborative technologies

Outcome 1: Stay safe and secure when working with collaborative technology

Assessment Criteria

The learner can:

1.1   Explain what and why guidelines need to be established for working with collaborative technology

1.2   Develop and implement guidelines for good practice in working with collaborative technology

1.3   Explain how to establish an identity or present information that will promote trust

1.4   Develop and implement guidelines for checking the authenticity of identities and different types of information

1.5   Analyse and plan for the risks in the use of collaborative technologies for different tasks

1.6   Analyse and manage risks in the use of collaborative technologies

Outcome 2: Plan and set up IT tools and devices for collaborative working

Assessment Criteria

The learner can:

2.1   Explain the features, benefits and limitations of different collaborative IT tools and devices for work purposes and tasks

2.2   Determine the IT tools and processes needed for archiving the outcomes of collaborative working

2.3   Summarise ways to integrate different collaborative technology tools and devices for a range of purposes, tasks and communication media

2.4   Explain potential access and compatibility issues with integrating different collaborative technology tools and devices

2.5   Select, connect and configure combinations that exploit the capabilities and potential of collaborative tools and devices

2.6   Resolve access and compatibility problems so that different collaborative tools and devices work successfully

Outcome 3: Prepare collaborative technologies for use

Assessment Criteria

The learner can:

3.1   Evaluate data management principles, issues and methods

3.2   Manage levels of access and permissions for different purposes

3.3   Select and integrate different elements across applications to create environments for collaborative technologies

3.4   Set and adjust settings to facilitate use of collaborative technologies by others

3.5   Manage data flow to benefit collaborative working

Outcome 4: Manage tasks using collaborative technologies

Assessment Criteria
The learner can:

4.1   Determine levels of responsibility for the use of collaborative technologies

4.2   Facilitate others' responsible contributions to and engagement with collaborative technologies

4.3   Manage the moderation of collaborative technologies

4.4   Oversee the archiving of the outcomes of collaborative working

4.5   Explain what problems can occur with collaborative technologies

4.6   Respond to problems with collaborative technologies and be prepared to help others to do so

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Stay safe and secure when working with collaborative technology
The learner should be able to and understand:

Guidelines for using collaborative technology:
- Guidelines set by your organisation or community of interest
- About uses, security, safety, copyright, plagiarism, libel, confidentiality and data protection
- Ways to communicate and promote guidelines about online security, confidentiality and data protection
- Methods to promote trust:
- Contact information, membership of professional bodies, recommendations, links, policies, standards

Checks on others' identities:
- Compare sources, cross references

Risks when working with collaborative technologies:
- Inappropriate disclosure of personal information
- Misuse of images
- Appropriate language, respect confidentiality, copy lists
- What to do in a power cut, about data loss
- Risk analysis, risk monitoring, contingency planning, updating risk management policy

Outcome 2   Plan and set up IT tools and devices for collaborative working
The learner should be able to and understand:

Connect and configure collaborative technologies:
- Connect to another site, check whether both sites are connected
- Connect to multiple sites, check when multiple sites are connected

- Adjust clarity
- IP address, adjust set-up options, the Open Systems Interconnection (OSI) model, facilities for sharing files and applications across multiple sites

Purposes for collaborative working:
- Will vary according to the task, but may include:
    o sharing, displaying and recording information, discussing and reflecting
    o establishing identity, joining interest groups
    o developing ideas, contributing to research, carrying out research
    o exporting information to other formats
    o establishing communities of interest
    o managing identities, managing data

Outcomes of collaborative working:
- Measurable (eg document, minutes, notes, project plan, transcript)
- Ephemeral (g conversation, agreement)
- Whether an audit trail is needed

Collaborative technology tools and devices:
- Hardware: mobile, laptop, desktop, peripherals (eg headset, handset, microphone, camera, 3G modem)
- Software: products, services, sites

Communication media:
- Text, audio/spoken, still/video/animated images

Compatibility issues:
- Between browser software, operating systems, plug-ins

Outcome 3   Prepare collaborative technologies for use
The learner should be able to and understand:

Access to collaborative technologies:
- Download software, agree terms and conditions, register or set up an ID
- Accessibility issues, adjusting access settings
- Accessibility standards

Permissions:
- Web address, phone number, user name and password, set up user names and access codes

Environments for collaborative technologies:
- User interface: choose skins, templates, widgets, wizards, cut and paste from other sources
- Work environment: lighting, position of devices

Adjust settings:
- Hardware: colour, type size, window size, volume
- Browser: cookies, pop-ups
- Security settings: firewall

Managing data:
- Sources, subscription details, terms and conditions

- Aims of data management
- Benefits, features and limitations of networks and feeds
- What constraints need to be overcome, what level of restrictions to apply

Outcome 4 Manage tasks using collaborative technologies
The learner should be able to and understand:

Contributing responsibly:
- Follow the rules of 'netiquette', respect others contributions, avoid dominating and not responding
- Legal and cultural issues
- User rules, moderations policies, ethical issues
- Moderating collaborative technologies:
- Reporting inappropriate content
- Checking posts

Archiving outcomes:
- Cut, paste, save; record, transcribe
- Problems with collaborative technologies:
- Routine (eg settings, software not responding, hardware connections)
- Non-routine (eg access, transmission speed, bandwidth); complex (eg compatibility)

Respond to problems:
- Follow on screen help, know who to ask for expert help
- Use diagnostic wizards, check bandwidth

Unit 342 Website software

Level: 3
Credit value: 5
NDAQ number: Y/502/4632

Unit aim

This is the ability to use a software application designed for planning, designing and building websites.

On completion of this unit a candidate should be able to select and use a range of advanced website software tools and techniques to develop multiple-page websites with multimedia and interactive features.

Website software tools and techniques will be defined as 'advanced' because:
- the software tools and functions used will be complex and at times involve having the idea that there may be a tool or function to do something (eg improve efficiency or create an effect), exploring technical support, self-teaching and applying;
- the development techniques will be complex, and will involve research, identification and application; and
- the user will take full responsibility for planning and developing the structure, inputting, manipulating, adding multimedia or interactive features, uploading and publishing the information.

Examples of context: Shopping website linked to product information and stock control database

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1 Create structures and styles and use them to produce websites
2 Select and use website software tools and features to develop multiple page websites with multimedia and interactive features
3 Publish and test multiple page websites with multimedia and interactive features

Guided learning hours

It is recommended that 40 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 3 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 342 Website software

Outcome 1: Create structures and styles and use them to produce websites

Assessment Criteria

The learner can:

1.1 Determine what website content and layout will be needed for each page and for the site

1.2 Plan and create web page templates to layout content

1.3 Select and use website features and structures to enhance website navigation and functionality

1.4 Create, select and use styles to enhance website consistency and readability

1.5 Provide guidance on laws, guidelines and constraints that affect the content and use of websites

1.6 Explain what access issues may need to be taken into account

1.7 Explain when and why to use different file types for saving content

1.8 Store and retrieve files effectively, in line with local guidelines and conventions where available

Outcome 2: Select and use website software tools and features to develop multiple page websites with multimedia and interactive features

Assessment Criteria

The learner can:

2.1 Prepare content for web pages so that it is ready for editing and formatting

2.2 Organise and combine information needed for web pages in line with any copyright constraints, including across different software

2.3 Select and use appropriate editing and formatting techniques to aid meaning

2.4 Select and use appropriate programming and development techniques to add features and enhance websites

2.5 Select and use file formats that make information easier to download

2.6 Check web pages meet needs, using IT tools and making corrections as necessary

Outcome 3: Publish and test multiple page websites with multimedia and interactive features

Assessment Criteria

The learner can:

3.1 Select and use appropriate testing methods to check that all elements and features of complex websites are working as planned

3.2 Identify any quality problems with websites and explain how to respond to them

3.3 Select and use an appropriate programme to upload and publish the website and make sure that it will download efficiently

3.4   Respond appropriately to quality problems with websites to ensure outcomes are fit for purpose

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Create structures and styles and use them to produce websites

The learner should be able to and understand:

Content and layout:
- Web page content and layout will vary according to the template, but may include:
    - text (eg body text, headings, captions)
    - images (eg still photographs, diagrams)
    - numbers (eg tables, charts or graphs)
    - background (eg colours, gradients, patterns, textures)
    - structure (eg frames, side bars)
    - moving images (eg animation, video clips)
    - sound (eg clips linked to navigation, background music, video sound track)
    - interactive components (eg message boards, forms, e-mail links, registration log-ins)
    - down loads (eg pdf files, pod casts)

Constraints affecting websites:
- Effect of copyright law (eg on music downloads or use of other people's images)
- Acknowledgment of sources, avoiding plagiarism, provisions of the Data Protection Act; accessibility standards, IPR

Website features:
- Web page features will vary, but may include:
    - navigation (eg action buttons, links, hot spots, menus, hyperlinks, pop-ups)
    - multimedia (eg animation, sound linked to actions, video clips, sound track)
    - interactive (eg message boards, forms, downloads, pod casts, e-mail links, registration log-ins)
    - e-commerce facilities

Website access issues:
- The difficulties different users may have in accessing websites
- Accessibility guidelines, ways to increase accessibility
- Affect of download speeds (eg from different browser software, connection type, size of web page contents), ways to improve download speeds
- Ways to improve search engine results

Web page templates:
- Web page content and layout will vary according to the template, but may include:
    - text (eg body text, headings, captions)
    - images (eg still photographs, diagrams)
    - numbers (eg tables, charts or graphs)
    - background (eg colours, gradients, patterns, textures)
    - structure (eg frames, side bars)
    - moving images (eg animation, video clips)

- o sound (eg clips linked to navigation, background music, video sound track)
- o interactive components (eg message boards, database fields, forms, e-mail links, registration log-ins)
- o downloads (eg pdf files, podcasts)

Web page styles:
- Styles will vary according to the different elements of the website design, but may include:
  - o typeface (eg font, colour, size and alignment of headings, captions or body text)
  - o lines (eg type, thickness and colour of borders, tables, diagrams)
  - o structure (eg size of frames, number of tabs, format of menu)
  - o cascading style sheets

File types:
- Text (eg rtf, doc, pdf), images (eg jpeg, tiff, psd), charts and graphs (eg xls), sound (eg wav, MP3)

Store and retrieve:
- Files (eg create, name, open, save, save as, print, close, find, share)
- Version control; import/export
- File size; folders (eg create, name)

Outcome 2   Select and use website software tools and features to develop multiple page websites with multimedia and interactive features
The learner should be able to and understand:

Combine information:
- Combine images with sound (eg dub or overlay sound track onto film sequence; integrate a audio or video sequence with another application):
  - o Techniques: copy and paste, insert, screen grabs/shots
  - o File download (eg connect USB lead, drag and drop), file transfer protocol (FTP)
  - o Forms of information: moving images, sound; pre-recorded, live, web-streaming

Editing techniques:
- Editing techniques will vary in line with the type of information, for example:
  - o select, copy, cut, paste, undo, redo, drag and drop, find, replace, size, crop, position, change templates

Programming and development techniques:
- Creating links to bookmark text within a page, linking web pages together, adding a link to another website
- Altering simple code using programming language, creating code using an appropriate programming language
- Adding multimedia content to web pages
- Setting up a secure area, message board or e-mail link
- Adding meta tags

File formats:
- Change format of documents to RTF or HTML

Check web pages:
- Using help: Will vary depending on the content but may include, for example:
  - o Text: spell check; grammar check, type face and size, hyphenation
  - o Layout: page layout, margins, line and page breaks, tables, sections

      o   Images: size, alignment and orientation, suitability of file format, appropriate choice of colour mode and use of filters, fitness for purpose of image resolution

Outcome 3   Publish and test multiple page websites with multimedia and interactive features

The learner should be able to and understand:

Testing methods:
- Methods will vary but may include:
- viewing web pages using browser software
- testing navigation round pages within multiple page website
- testing external links
- testing multi-media and interactive elements

Quality problems with websites:
- Problems may vary, but could include:
    - content that is not appropriate for the template or missing
    - text that is not readable or missing
    - images that are oriented or sized wrongly
    - navigation that does not work as planned
    - multimedia features (eg sound levels, image resolution, synchronisation of sound and images)
    - interactive features (eg response to posting a message or when key fields on forms are not completed, downloads not active)

Upload and publish website:
- Upload content to a template
- Use file exchange programme to upload and publish (eg FTP or HTTP)
- Improve loading speed of a website
- Submit to search engines

Unit 343 Word processing software

Level: 3
Credit value: 6
NDAQ number: Y/502/4629

Unit aim

This is the ability to use a software application designed for the creation, editing and production of largely text-based documents. On completion of this unit a candidate should be able to select and use a range of advanced word processing software tools and techniques to produce complex and non-routine documents.

Word processing tools and techniques will be described as 'advanced' because:
- the software tools and functions will be complex and at times require new learning, which will involve having the idea that there may be a tool or function to do something (eg improve efficiency or create an effect), exploring technical support, self-teaching and applying;
- the techniques required will be complex, and the process of selecting appropriate techniques may involve research, identification and application; and
- the user will take full responsibility for the inputting, manipulating and outputting of the information.

Examples of context: Typical documents will require problem solving and creative thinking and may include – complex reports and content for publications such as web pages, journals, newsletters or other printed materials.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1. Enter and combine text and other information accurately within word processing documents
2. Create and modify appropriate layouts, structures and styles for word processing documents
3. Use word processing software tools and techniques to format and present documents effectively to meet requirements

Guided learning hours

It is recommended that 45 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit is linked to the Level 3 IT User NOS devised by e-Skills UK.

Support of the unit by a sector or other appropriate body

This unit was developed by e-Skills UK.

Assessment

This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.

Unit 343　　　Word processing software

Outcome 1: Enter and combine text and other information accurately within word processing documents

Assessment Criteria

The learner can:

1.1　　Summarise what types of information are needed for the document and how they should be linked or integrated

1.2　　Use appropriate techniques to enter text and other types of information accurately and efficiently

1.3　　Create, use and modify appropriate templates for different types of documents

1.4　　Explain how to combine and merge information from other software or multiple documents

1.5　　Combine and merge information within a document from a range of sources

1.6　　Store and retrieve document and associated files effectively, in line with local guidelines and conventions where available

1.7　　Select and use tools and techniques to work with multiple documents or users

1.8　　Customise interface to meet needs

Outcome 2: Create and modify appropriate layouts, structures and styles for word processing documents

Assessment Criteria

The learner can:

2.1　　Analyse and explain the requirements for structure and style

2.2　　Create, use and modify columns, tables and forms to organise information

2.3　　Define and modify styles for document elements

2.4　　Select and use tools and techniques to organise and structure long documents

Outcome 3: Use word processing software tools and techniques to format and present documents effectively to meet requirements

Assessment Criteria

The learner can:

3.1　　Explain how the information should be formatted to aid meaning

3.2　　Select and use appropriate techniques to format characters and paragraphs

3.3　　Select and use appropriate page and section layouts to present and print multi-page and multi-section documents

3.4　　Check documents, meet needs, using IT tools and making corrections as necessary

3.5 Evaluate the quality of the documents produced to ensure they are fit for purpose

3.6 Respond appropriately to any quality problems with documents to ensure that outcomes meet needs and are fit for purpose

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1   Enter and combine text and other information accurately within word processing documents

The learner should be able to and understand:

Types of information:
- Text, numbers, images, other graphic elements (eg lines, borders), hyperlinks, charts, objects
- Templates:
- Use existing templates
- Create, amend and delete templates

Combine information:
- Insert, size, position, wrap, order, group
- Link information in a document to another source, link information from one type of software to information produced using different software
- Mail merge documents and labels, merge fields
- Hyperlinks

Store and retrieve:
- File properties, protection, password protection
- Versions, storage and backup locations
- File formats, open rtf file in application, save file as text, rtf or html
- Methods to reduce file size
- Templates, stylesheets

Work with multiple documents or users:
- Version control, audit and track changes, compare and merge documents
- Document sharing and collaboration

Customise interface:
- Shortcuts, toolbars, menus
- Default settings
- Start-up, language

Outcome 2   Create and modify appropriate layouts, structures and styles for word processing documents

The learner should be able to and understand:

Requirements for structure and style:
- Document layout, house style, branding

Tables and forms:
- Insert and delete cells, rows and columns, adjust row height and column width

- Add table, complete forms and tables, convert text to table
- Create and amend forms, merge and split cells, horizontal and vertical text alignment, cell margin, add borders and shading, sort, position, headings, totals; heading rows
- Embedded spreadsheet data

Format columns:
- Modify column number and width, add column breaks, add columns to whole document and part of a page

Styles:
- Heading styles: apply or change existing styles to a word, line, paragraph or section
- Define, organise and use new styles

Page layout:
- Paper size and type, change page orientation, margins, header and footer, page and section breaks, page numbering, date and time, columns, adjust page set up for printing or web publishing, facing pages, booklets

Document structure:
- Page breaks, columns, sections, Bookmarks, cross referencing using indexes and contents page, outlines, master and sub-documents

Outcome 3   Use word processing software tools and techniques to format and present documents effectively to meet requirements
The learner should be able to and understand:

Format characters:
- Size, font style (typeface), colour, bold, underline, italic, superscript, subscript, special characters and symbols, spacing, position

Format paragraphs:
- Alignment, numbering, line spacing, paragraph spacing
- Indents, tabs, widows and orphans, outline
- Borders, bullets, shading, sub-numbering
- Custom styles, style sheet
- Graphics, objects, text wrap

Automate routines:
- Keyboard shortcuts, autotext, customise menus, macros

Check word processed documents:
- Spell check, grammar check, typeface and size, hyphenation
- Page layout, margins, line and page breaks, tables
- Print preview, accuracy, consistency, clarity
- Language and dictionary settings
- Cross referencing

Quality problems with documents:
- Will vary according to the content, for example:
    - text (eg styles, structure, layout)
    - images (eg size, position, orientation)
    - numbers (eg decimal points, results of any calculations)
    - Links, cross references, versions

Unit 421 Manage physical resources

Level: 4
Credit value: 3
NDAQ number: K/600/9711

Unit aim

This unit will ensure that learners are able to identify, obtain, manage and review the use of physical resources. The unit also ensures learners are able to take the environmental impact of resource use into consideration.

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:
1 Understand the importance of sustainability when using physical resources
2 Be able to identify resource requirements for own area of responsibility
3 Be able to obtain required resources for own area of responsibility
4 Be able to monitor and review the quality and usage of resources in own area of responsibility

Guided learning hours

It is recommended that 25 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Management and Leadership NOS MSC E8.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Management Standards Centre.

Assessment

This unit will be assessed as specified in the MSC Management and Leadership Assessment Strategy February 2010.

Unit 421   Manage physical resources

Outcome 1: Understand the importance of sustainability when using physical resources

Assessment Criteria

The learner can:

1.1   Explain the importance of using sustainable resources.

1.2   Explain the potential impact of resource use on the environment.

1.3   Describe actions one can take to minimise any adverse environmental impact of using physical resources.

Outcome 2: Be able to identify resource requirements for own area of responsibility

Assessment Criteria

The learner can:

2.1   Consult with colleagues to identify their planned activities and corresponding resource needs.

2.2   Evaluate past resource use to inform expected future demand.

2.3   Identify resource requirements for own area of responsibility.

Outcome 3: Be able to obtain required resources for own area of responsibility

Assessment Criteria

The learner can:

3.1   Submit a business case to procure required resources.

3.2   Review and agree required resources with relevant individuals.

3.3   Explain an organisation's processes for procuring agreed resources.

Outcome 4: Be able to monitor and review the quality and usage of resources in own area of responsibility

Assessment Criteria

The learner can:

4.1   Monitor the quality of resources against required specifications.

4.2   Identify differences between actual and planned use of resources and take corrective action.

4.3   Analyse the effectiveness and efficiency of resource use in own area of responsibility.

4.4   Make recommendations to improve the effectiveness and efficiency of resource use.

Unit 422   Manage the environmental impact of work activities

Level: 4
Credit value: 5
NDAQ number: M/600/9712

Unit aim

This unit will ensure that learners understand how to, and are able to, assess the environmental impact of their work and operate in such a way as to reduce the impact on the environment.

Learning outcomes

There are **five** learning outcomes to this unit.

The learner will:

1   Understand the legal requirements and environmental policies that impact on own area of responsibility.
2   Understand how to assess the impact of work activities on the environment and how this can be minimised.
3   Be able to assess and report on the environmental impact of work activities in own area of responsibility.
4   Be able to organise work activities and resource use to minimise environmental impact.
5   Be able to promote ongoing improvement in environmental performance.

Guided learning hours

It is recommended that 10 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Management and Leadership NOS MSC E9.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Management Standards Centre.

Assessment

This unit will be assessed as specified in the MSC Management and Leadership Assessment Strategy February 2010.

Unit 422 Manage the environmental impact of work activities

Outcome 1: Understand the legal requirements and environmental policies that impact on own area of responsibility.

Assessment Criteria

The learner can:

1.1   Explain the legal requirements that impact on own area of responsibility.

1.2   Explain the environmental policies that impact on own area of responsibility.

Outcome 2: Understand how to assess the impact of work activities on the environment and how this can be minimised.

Assessment Criteria

The learner can:

2.1   Explain what specialist advice is available to manage the environmental impact of work activities.

2.2   Explain how to assess the impact of work activities and resources on the environment.

2.3   Explain how to minimise the environmental impact of work activities.

Outcome 3: Be able to assess and report on the environmental impact of work activities in own area of responsibility.

Assessment Criteria

The learner can:

3.1   Assess the environmental impact of work activities and resource use.

3.2   Produce a report on the environmental impact of work activities and resource use, with recommendations for improvement.

Outcome 4: Be able to organise work activities and resource use to minimise environmental impact.

Assessment Criteria

The learner can:

4.1   Adapt the use of resources in own area of responsibility to reduce environmental impact.

4.2   Organise activities in own area of responsibility to reduce environmental impact.

Outcome 5: Be able to promote ongoing improvement in environmental performance.

Assessment Criteria

The learner can:

5.1 Establish means by which individuals can identify and report opportunities for improving environmental performance.

5.2 Communicate environmental benefits resulting from changes to work activities.

Unit 423 Provide leadership and direction for own area of responsibility

Level: 4
Credit value: 5
NDAQ number: T/600/9601

Unit aim

This unit helps learners to provide leadership and direction for their area of responsibility.

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:
1 Be able to lead in own area of responsibility.
2 Be able to provide direction and set objectives in own area of responsibility.
3 Be able to communicate the direction for own area of responsibility and collect feedback to inform improvement.
4 Be able to assess own leadership performance.

Guided learning hours

It is recommended that 30 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Management and Leadership NOS MSC B6.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Management Standards Centre.

Assessment

This unit will be assessed as specified in the MSC Management and Leadership Assessment Strategy February 2010.

Unit 423 Provide leadership and direction for own area of responsibility

Outcome 1: Be able to lead in own area of responsibility.

Assessment Criteria

The learner can:

1.1 Identify own strengths and ability to lead in a leadership role.

1.2 Evaluate strengths within own area of responsibility.

Outcome 2: Be able to provide direction and set objectives in own area of responsibility.

Assessment Criteria

The learner can:

2.1 Outline direction for own area of responsibility.

2.2 Implement objectives with colleagues that align with those of the organisation.

Outcome 3: Be able to communicate the direction for own area of responsibility and collect feedback to inform improvement.

Assessment Criteria

The learner can:

3.1 Communicate the agreed direction to individuals within own area of responsibility.

3.2 Collect feedback to inform improvement.

Outcome 4: Be able to assess own leadership performance.

Assessment Criteria

The learner can:

4.1 Assess feedback on own leadership performance.

4.2 Evaluate own leadership performance.

Unit 424 Support learning and development within own area of responsibility

Level: 4
Credit value: 5
NDAQ number: M/600/9676

Unit aim

This unit helps learners to understand the importance of learning and to develop a learning environment within own area of responsibility.

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

1 Be able to identify the learning needs of colleagues in own area of responsibility.
2 Understand how to develop a learning environment in own area of responsibility.
3 Be able to support colleagues in learning and its application.
4 Be able to evaluate learning outcomes and future learning and development of colleagues.

Guided learning hours

It is recommended that 25 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Management and Leadership NOS MSC D7.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Management Standards Centre.

Assessment

This unit will be assessed as specified in the MSC Management and Leadership Assessment Strategy February 2010.

Unit 424   Support learning and development within own area of responsibility

Outcome 1: Be able to identify the learning needs of colleagues in own area of responsibility.

Assessment Criteria

The learner can:

1.1   Identify gaps between requirements of colleagues' current or future work roles and their existing knowledge, understanding and skills.

1.2   Prioritise learning needs of colleagues.

1.3   Produce personal development plans for colleagues in own area of responsibility.

Outcome 2: Understand how to develop a learning environment in own area of responsibility.

Assessment Criteria

The learner can:

2.1   Explain the benefits of continual learning and development.

2.2   Explain how learning opportunities can be provided for own area of responsibility.

Outcome 3: Be able to support colleagues in learning and its application.

Assessment Criteria

The learner can:

3.1   Identify information, advice and guidance to support learning.

3.2   Communicate to colleagues to take responsibility for their own learning.

3.3   Explain to colleagues how to gain access to learning resources.

3.4   Support colleagues to practise and reflect on what they have learned.

Outcome 4: Be able to evaluate learning outcomes and future learning and development of colleagues.

Assessment Criteria

The learner can:

4.1   Examine with each colleague, whether the learning activities undertaken have achieved the desired outcomes.

4.2   Support colleagues when updating their personal development plan.

Unit 425 Develop working relationships with colleagues and stakeholders

Level: 4
Credit value: 4
NDAQ number: K/600/9661

Unit aim

This unit will help learners to develop effective working relationships with colleagues and stakeholders.

Learning outcomes

There are **three** learning outcomes to this unit.

The learner will:
1 Know how to identify stakeholders and their relevance to an organisation.
2 Understand how to establish working relationships with colleagues and stakeholders.
3 Be able to create an environment of trust and mutual respect with colleagues and stakeholders.

Guided learning hours

It is recommended that 20 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Management and Leadership NOS MSC D2.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Management Standards Centre.

Assessment

This unit will be assessed as specified in the MSC Management and Leadership Assessment Strategy February 2010.

Unit 425 Develop working relationships with colleagues and stakeholders

Outcome 1: Know how to identify stakeholders and their relevance to an organisation.

Assessment Criteria

The learner can:

1.1 Identify an organisation's stakeholders.

1.2 Evaluate the roles, responsibilities, interests and concerns of stakeholders.

1.3 Assess the importance of identified stakeholders.

Outcome 2: Understand how to establish working relationships with colleagues and stakeholders.

Assessment Criteria

The learner can:

2.1 Clarify how to agree a common sense of purpose with colleagues and stakeholders.

2.2 Summarise how to create an environment of trust and mutual respect with colleagues and stakeholders.

Outcome 3: Be able to create an environment of trust and mutual respect with colleagues and stakeholders.

Assessment Criteria

The learner can:

3.1 Review and revise the needs and motivations of colleagues and stakeholders.

3.2 Demonstrate interaction with colleagues and stakeholders that allows respect for the views and actions of others.

Unit 426   Plan, organise and control customer service operations

Level: 4
Credit value: 10
NDAQ number: A/601/1236

Unit aim

Delivering effective customer service is key to winning and maintaining customer loyalty. This requires careful planning and organisation, followed by close monitoring and control of customer service operations. When problems occur, the learner must be able to deal with these problems in a way that leaves their customer with a positive impression of the organisation. This unit is about managing the delivery of services to the customer.

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:
  1   Plan customer service operations
  2   Supervise customer service operations
  3   Deal with problems relating to customer service operations
  4   Understand how to plan, organise and control customer service operations

Guided learning hours

It is recommended that 67 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to Unit B13 of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Institute of Customer Service.

Assessment

This unit will be assessed by portfolio of evidence, as specified in the Institute of Customer Service (ICS) Customer Service Assessment Strategy 2010.

Unit 426 Plan, organise and control customer service operations

Outcome 1: Plan customer service operations

Assessment Criteria

The learner can:

1.1 analyse customer expectations and define the service offer designed to meet those expectations

1.2 develop specific plans that will ensure sustainable and consistent delivery of customer service

1.3 identify any contingencies that may occur, assess their risks and develop effective plans to deal with them

1.4 plan how they will monitor and evaluate customer service operations.

Outcome 2: Supervise customer service operations

Assessment Criteria

The learner can:

2.1 negotiate the availability of people and other resources that they need to implement their customer service delivery plans

2.2 develop specific, measurable and realistic targets for the staff who deliver customer service

2.3 ensure that planned resources are available when required

2.4 brief staff on their objectives and targets

2.5 encourage feedback from staff and customers and use their feedback to modify objectives and targets

2.6 collect and analyse feedback from customers and staff on customer service operations

2.7 evaluate how effectively agreed outcomes and processes are being achieved

2.8 modify their plans for customer service operations in the light of their evaluation.

Outcome 3: Deal with problems relating to customer service operations

Assessment Criteria

The learner can:

3.1 collect information on the nature of the problem and assess the likely impact on the customer

3.2 identify the causes of the problem and possible solutions

3.3 evaluate possible solutions against customer expectations and organisational needs

3.4 select and implement an acceptable solution with the minimum possible disruption to customers

3.5 monitor the implementation of the solution and, where necessary, make adjustments.

Outcome 4: Understand how to plan, organise and control customer service operations

Assessment Criteria

The learner can:

4.1   explain how to develop plans for customer service operations and what these plans should contain

4.2   explain how to identify and work within allocated budgets and time targets for customer service operations

4.3   describe the types of contingencies that may occur during customer service operations, how to assess their risks and plan how to deal with them

4.4   describe the types of monitoring methods that can be used and the criteria they should select to evaluate the effectiveness of customer service operations

4.5   explain how to develop objectives and targets for staff

4.6   explain the importance of briefing staff and how to do so effectively

4.7   explain the importance of monitoring the quality of their customer service operations

4.8   investigate the types of problems that are likely to occur in their customer service operations and how to plan for dealing with these

4.9   explain the importance of liaising with customers and colleagues about problems and possible solutions

4.10   explain how to identify and evaluate possible solutions.

Evidence requirements

1   Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

2   You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

3   You must provide evidence that shows you have done this over a sufficient period of time for your assessor to be confident that you are competent.

4   Your plans must provide evidence that you have taken into account:

a   the aims, objectives and targets for your area of responsibility

b   your organisation's customer service strategy

c   your customers' needs and expectations.

5   Your evidence must show that your plans include consideration of:

a   time

b   physical resources

c   human resources

d   financial resources.

6   You must show that you have negotiated with:

a   front-line staff

b   supervisors or team leaders

c   senior managers.

7   You must provide evidence that you have collected and analysed:

a   qualitative information

b   quantitative information.

Unit 506　　Recruit staff in own area of responsibility

Level: 　　5
Credit value: 　4
NDAQ number: 　T/600/9663

Unit aim

This unit helps learners to contribute to the recruitment, selection and induction of staff and evaluate the processes used.

Learning outcomes

There are **four** learning outcomes to this unit.

The learner will:

1　Be able to review human resource requirements to meet business objectives in own area of responsibility.
2　Understand the importance of ensuring that recruitment and selection processes meet legal, regulatory, ethical and social requirements.
3　Be able to participate in the recruitment and selection process.
4　Be able to evaluate the recruitment and selection process and identify improvements for the future.

Guided learning hours

It is recommended that 25 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Management and Leadership NOS MSC D3.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Management Standards Centre.

Assessment

This unit will be assessed as specified in the MSC Management and Leadership Assessment Strategy February 2010.

Unit 506   Recruit staff in own area of responsibility

Outcome 1: Be able to review human resource requirements to meet business objectives in own area of responsibility.

Assessment Criteria

The learner can:

1.1   Examine the human resources required to meet objectives in own area of responsibility.

1.2   Identify gaps between current and required human resources to meet objectives.

1.3   Assess the options for human resource requirements to meet objectives.

Outcome 2: Understand the importance of ensuring that recruitment and selection processes meet legal, regulatory, ethical and social requirements.

Assessment Criteria

The learner can:

2.1   Explain how to ensure recruitment and selection processes are fair.

2.2   Explain how to ensure that legal requirements, industry regulations, organisational policies and professional codes are met.

2.3   Explain when to seek specialist expertise throughout the recruitment process.

Outcome 3: Be able to participate in the recruitment and selection process.

Assessment Criteria

The learner can:

3.1   Consult with relevant others to produce or update job descriptions.

3.2.   Agree with colleagues the stages in the recruitment and selection process for identified vacancies.

3.3   Identify the methods and criteria that will be used in the recruitment and selection process.

Outcome 4: Be able to evaluate the recruitment and selection process and identify improvements for the future.

Assessment Criteria

The learner can:

4.1   Assess and select candidates using agreed methods and criteria.

4.2   Evaluate the recruitment and selection methods and criteria used in own area of responsibility.

4.3   Identify ways of improving future recruitment and selection.

Unit 507   Monitor and review business processes

Level: 5
Credit value: 3
NDAQ number: A/600/9759

Unit aim

This unit enables learners to monitor, implement and review business processes in their own area of responsibility.

Learning outcomes

There are **two** learning outcomes to this unit.

The learner will:
1   Be able to monitor business processes in own area of responsibility
2   Be able to review and improve business processes in own area of responsibility

Guided learning hours

It is recommended that 20 hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national occupational standards

This unit directly relates to the Management and Leadership NOS MSC F3.

Support of the unit by a sector or other appropriate body

This unit has been developed by the Management Standards Centre.

Assessment

This unit will be assessed as specified in the MSC Management and Leadership Assessment Strategy February 2010.

Unit 507   Monitor and review business processes

Outcome 1: Be able to monitor business processes in own area of responsibility

Assessment Criteria

The learner can:

1.1   Develop measures that are appropriate and provide suitable information to assess business processes.

1.2   Monitor the quality of work against key success criteria working with relevant stakeholders.

Outcome 2: Be able to review and improve business processes in own area of responsibility

Assessment Criteria

The learner can:

2.1   Review business processes.

2.2   Take corrective action and revise plans where necessary.

2.3   Implement revised business processes to all relevant stakeholders.

2.4   Measure the effects of change in business processes in own area of responsibility.

Useful contacts

Type	Contact	Query
UK learners	T: +44 (0) 844 543 0033 E: learnersupport@cityandguilds.com	• General qualification information
International learners	T: +44 (0)20 7294 2885 F: +44 (0)20 7294 2413 E: intcg@cityandguilds.com	• General qualification information
Centres	T: +44(0) 844 543 0000 F: +44 (0)20 7294 2413 E: centresupport@cityandguilds.com	• Exam entries • Registrations/enrolment • Certificates • Invoices • Missing or late exam materials • Nominal roll reports • Results
Single subject qualifications	T: +44 (0)20 7294 8080 F: +44 (0)20 7294 2413 F: +44 (0)20 7294 2404 (BB forms) E: singlesubjects@cityandguilds.com	• Exam entries • Results • Certification • Missing or late exam materials • Incorrect exam papers • Forms request (BB, results entry) • Exam date and time change
International awards	T: +44 (0)20 7294 2885 F: +44 (0)20 7294 2413 E: intops@cityandguilds.com	• Results • Entries • Enrolments • Invoices • Missing or late exam materials • Nominal roll reports
Walled Garden	T: +44 (0)20 7294 2840 F: +44 (0)20 7294 2405 E: walledgarden@cityandguilds.com	• Re-issue of password or username • Technical problems • Entries • Results • GOLA • Navigation • User/menu option problems
Employer	T: +44 (0)121 503 8993 E: business_unit@cityandguilds.com	• Employer solutions • Mapping • Accreditation • Development Skills • Consultancy
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