

# Skillsfirst Awards

## Handbook

### Level 2 NVQ Certificate in Business and Administration (QCF)

**BAC02**



**Skillsfirst**  
growth through learning

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## 1.0 Introduction

- 1.1 Skillsfirst Awards is an awarding organisation specialising in the provision of vocational qualifications across a range of occupational areas.
- 1.2 Skillsfirst Awards recognises the need for industry to have fully trained and qualified staff – reliably qualified to recognised industry standards.
- 1.3 The following handbook provides the learning outcomes and assessment strategy for the delivery of the Level 2 NVQ Certificate in Business and Administration (QCF). The handbook is a live document and will be updated should there be any incremental change made. Centres will be informed electronically when changes are made and it will be the responsibility of any recognised centre to ensure the most up to date version of the handbook is used. The document also provides details of the administrative procedures, requirements and responsibilities that are associated with the delivery of vocational qualifications.

The handbook is available on the Skillsfirst Awards website [www.skillsfirst.co.uk](http://www.skillsfirst.co.uk)

- 1.4 This document is copyright but can be copied by any of our recognised centres for the purpose of assessing learners and may also be copied by learners for their own use.

## 2.0 Skillsfirst Awards

### 2.1 Data protection

Skillsfirst Awards takes the protection of data seriously and to this end has developed a data protection statement outlining how Skillsfirst and our centres, comply with the current legislation on data protection. It is important for centres to read our statement and ensure that our requirements are put in place. It is particularly important that centres make learners aware that data is shared with Skillsfirst Awards. Our policy statement on this and data requirements can be found in our centre handbook on our website [www.skillsfirst.co.uk](http://www.skillsfirst.co.uk)

### 2.2 Equality and accessibility

#### Equality and accessibility

Skillsfirst is committed to giving everyone who wants to gain one of our qualifications an equal opportunity of achieving it in line with current UK legislation and EU directives including the Equality Act (2010) and to ensure this occurs, has in place a policy on equality and accessibility which can be found on our website [www.skillsfirst.co.uk](http://www.skillsfirst.co.uk) and within our centre handbook.

Skillsfirst will ensure that centres use a equality and accessibility policy that works together with ours and that they maintain an effective appeals procedure which along with the equality and accessibility policy, will be monitored by the external verifier. We expect centres to tell learners how to find and use their own equality and accessibility and appeals procedures.

#### Access to assessment

Skillsfirst Awards is committed to guaranteeing all learners are treated fairly and equally and to ensure this occurs, has in place a policy on reasonable adjustments and special considerations. This policy states clearly what centres can and in some cases must, put in place to assist learners who may have particular requirements. We expect centres to tell learners how to find and use their own reasonable adjustments and special considerations policy and will monitor implementation through the external verification process.

This policy can be accessed at [www.skillsfirst.co.uk](http://www.skillsfirst.co.uk) and within our centre handbook. Further advice on this policy and its application can be obtained from our customer services team at [customerservices@skillsfirst.co.uk](mailto:customerservices@skillsfirst.co.uk)

## 2.3 Enquiries and information sources

Skillsfirst aims to provide accurate information in a variety of formats and media. Recognised centres are encouraged to make enquiries to the customer services team, or seek clarification from our website. Learners wishing to enquire about qualifications, aspects of qualifications or quality assurance policies and procedures are encouraged, in the first instance, to seek information from the recognised centre or their tutor/assessor. Where a satisfactory answer is unavailable, learners are encouraged to seek clarification from our website, or from the Skillsfirst customer services team.

As a guide, the majority of frequently requested information is available on our website or on request via the electronic helpline listed below.

Website: [www.skillsfirst.co.uk](http://www.skillsfirst.co.uk)  
email: [customerservices@skillsfirst.co.uk](mailto:customerservices@skillsfirst.co.uk)  
Tel: 0121 270 5100  
Fax: 0121 747 4102

In writing to:

Customer Services  
Skillsfirst Awards Limited  
Suite 215  
Fort Dunlop  
Fort Parkway  
Birmingham  
B24 9FD

## 2.4 Complaints and appeals

### Complaints

Skillsfirst Awards will endeavour at all times to satisfy our customer's needs and ensure a quality service. There may be times when our centres do not feel we have met these needs. Should they wish, centres may complain in writing to the Skillsfirst Awards customer services manager. We will attempt to resolve all complaints within the published timescales and will record and review all complaints as part of our ongoing customer service commitment.

### Appeals

Skillsfirst Awards aims to ensure that at all times its decisions are fair, consistent and based on valid judgements. However, it is recognised that there may be occasions when a centre or a learner may wish to question a decision made. Skillsfirst Awards therefore has an appeals policy and process which clearly indicates the rights of the centre and the learner to appeal against a range of decisions taken by Skillsfirst.

The Skillsfirst Awards appeals policy and process can be accessed on our website [www.skillsfirst.co.uk](http://www.skillsfirst.co.uk) and within our centre handbook. Centres are required to have a documented policy and procedure which allows learners to question decisions made by the centre. The final stage of such a procedure may be to appeal to the Skillsfirst Awards external verifier. This policy would form part of the original centre recognition process and its implementation will be monitored by the external verifier.

## 2.5 Malpractice and maladministration

Skillsfirst Awards has a responsibility to ensure that malpractice and maladministration is addressed effectively and to publish procedures to centres for dealing with malpractice on the part of learners, centre staff and any others involved in providing the qualification. To meet this requirement, Skillsfirst Awards has a malpractice and maladministration policy and process, the details of which can be accessed on our website [www.skillsfirst.co.uk](http://www.skillsfirst.co.uk)

## 3.0 The sector skills council for business and administration

### 3.1 Council for Administration (CfA)

The Level 2 NVQ Certificate in Business and Administration (QCF) are based on the units developed by the CfA who are the sector skills council for retail. Their contact details are:

6 Graphite Square  
Vauxhall Walk  
London  
SE11 5EE

Phone 020 7091 9620

[info@cfa.uk.com](mailto:info@cfa.uk.com)

This handbook provides details from CfA's assessment strategy, which centres will need to apply in order to assess and quality assure the Level 2 NVQ Certificate in Business and Administration (QCF) and includes the:

- occupational expertise of those who assess performance, and moderate and verify assessments
- continuous professional development
- summary of assessment methods

The complete assessment strategy is available for view and to download from the CfA website [www.cfa.uk.com](http://www.cfa.uk.com)

### 3.2 Occupational expertise of those who assess performance, and moderate and verify assessments

Learners can be assessed, moderated or verified at work either by:

a. **Assessors, moderators or verifiers** who have achieved or are working towards achievement of the appropriate regulatory body approved unit qualifications for assessment, moderation or verification;

OR

b. A **trainer, supervisor or manager**, employed by an organisation, who must either:

- Have achieved or be in the process of achieving the appropriate regulatory body approved unit qualifications for assessment, moderation or verification; **or**,
- Seek guidance and approval from an awarding organisation to demonstrate that the organisation has appropriate processes in place to facilitate assessment, moderation or verification functions

The trainer, supervisor or manager is able to map their assessment, moderation or verification skills and knowledge 100% to the NOS upon which the qualifications above are based.

**Assessors** must be occupationally competent to make Business and Administration assessment judgements about the level and scope of individual candidate performance at work or in RWEs; and,

occupationally competent to make assessment judgements about the quality of assessment and the assessment process.

**External moderators / verifiers or internal moderators / verifiers** must be occupationally competent to make Business and Administration moderation and verification judgements about the quality of assessment and the assessment process.

### 3.3 Continuous professional development

The sector requires all assessors, moderators and verifiers to maintain current business and administration competence to deliver these functions. The CfA recognises this can be achieved in many ways but must be recorded in individual continual professional development (CPD) records that are maintained in business and administration assessment centres.

### 3.4 Demonstrating competence in a QCF NVQ in business and administration

To be awarded a QCF NVQ in Business & Administration, learners must demonstrate that they are able to perform the job or an appropriate task competently. Competence may be demonstrated in the private sector, not-for-profit sector or public sector. Learners may be employed as full-time, part-time, paid or voluntary members of staff.

The assessment of all units at any level of a Business and Administration QCF NVQ or competence-based qualification, ‘... may be based on either learner performance at work or through simulation, as necessary’<sup>1</sup>.

The QCF Business and Administration units have been designed to meet the design features of the QCF unit template, required by Ofqual for any body recognised to develop QCF units and Rules of Combination, of which the CfA is one such body. In the QCF, to achieve a unit a learner must achieve all the assessment criteria of a learning outcome, for all learning outcomes in the unit. Learners will, therefore, need to offer evidence in support of all assessment criteria of a unit.

For this qualification, the units found within the competence category of “Core Business and Administration” units – BA201-205 - have been designed to be assessed alongside evidence from units from other competence categories.

“Core Business and Administration should not be assessed separately. Assessors should plan well to make sure that the assessment criteria of all “Core Business and Administration” units are covered by evidence produced from the triangulation of evidence from other units within the other business and administration competence categories. Therefore, to support the learner and lessen the burden of duplication of assessment, assessors are encouraged to make sure critical and holistic assessment methods are implemented.

## 4.0 Summary of assessment methods

For this qualification, learners will be required to provide a portfolio of evidence for **each** unit.

### 4.1 Types of evidence

Units will be achieved through the acquisition of evidence by the learner and submission to their assessor.

Units may be assessed through a number of different sources and forms, which must meet the requirements of assessment criteria, which may include:

- **Naturalistic observation of workplace activities:** Assessors must provide information about the context of the assessment.
- **Products:** Such as reports, letters, e-mails, memos, printouts, etc, are also valuable items of performance evidence. Assessors are encouraged to assess work products in situ and record the location of evidence within their assessment records. Assessment centres using 'paperless portfolios' should first discuss their approach to assessment with their awarding organisation.
- **Expert witness:** Can be used to address any gaps in the technical and occupational competence of assessors, and also for confidential or sensitive activities that are not appropriate for assessor observation. Expert witnesses are identified and trained by the centre.
- **Witness testimony:** Can provide valuable evidence of learner competence. In line with established principles, witness testimony must be:
  - a) a clear, authentic statement indicating how the learner carries out their job and
  - b) dated, signed and include the job title of the witness.
- **Learner reports (feedback):** Oral or written reports from the learner which involve descriptions of activities and processes and some self-assessment, e.g. a work diary.
- **Reflective accounts:** A reflective account is usually a write up of how a learner has carried out part of their job, recording events that actually happened. Where possible, the account should state why the learner took the actions they did.
- **Recognition of prior learning (RPL) / achievement (RPA):** May be evidenced from a range of activities, using valid assessment methods that meet the requirements of the assessment criteria of a unit. Evidence in support of RPL / RPA must be authentic, current, valid, relevant and sufficient.
- **Professional discussion:** Professional discussion is a single, or series of, structured, planned and in-depth discussion(s) which can be recorded electronically or manually in paper, computer, audio or video files. Professional discussions can be used to support observation reports, examination of work products and knowledge questionnaires. The CfA supports the use of professional discussion in holistic assessment.
- **Verbal / written questions:** Also includes questionnaires; work based tasks; reflective accounts; case studies; professional discussion; and, feedback reports. As assessment by observation and examination of work products usually results in inferred knowledge. Questions should only be asked to fill gaps where knowledge is not explicit. This style of assessment still requires the assessor to confirm how knowledge and understanding has been addressed but avoids over assessment of the learner.
- **Projects:** An extended piece of practical and / or written work involving planning and research, generally presented as a report.
- **Assignments:** May be practical or written tasks given to learners which test skills, knowledge or understanding, or combinations of all three.
- **Case studies:** An effective case study report should:
  - a) clearly identify the core problem(s)
  - b) analyse the issues underlying the problem
  - c) discuss and justify alternative solutions using theory / experience
  - d) present feasible recommendations

- e) be presented in an appropriate format.
- **Audio / video recordings:** May be used to support observation reports, examination of work products and knowledge questionnaires.
- **Simulation / role play:** A task-based function where there are clear goals which need to be achieved and the outcomes are evaluated in a 'real-work environment. If a unit or part of a unit at any level is simulated, it must be undertaken in a 'realistic working environment' (RWE). Skillsfirst will provide guidance for centres on RWEs and will make sure RWEs, "provide an environment which replicates the key characteristics of the workplace in which the skill to be assessed is normally employed".

This list is illustrative of the options available to provide evidence in support of achieving the assessment criteria of a unit. The most appropriate forms of evidence should be selected for each unit or part of a unit.

## 4.2 Characteristics of assessment guidance

The learner may produce evidence from a range of examples (as outlined above) which should be recorded in some form. A record of evidence will confirm to the assessor their confidence in the learner's breadth and depth of knowledge and understanding in being able to competently meet the functional requirements of a Business and Administration QCF NVQ unit.

The assessor will need to be assured that the learner can:

- consistently perform the job or tasks to the required level of competence
- meet all the learning outcomes of a unit
- pass all the assessment criteria of a unit.

All examples of evidence submitted for assessment of a unit must be:

- current
- sufficient
- relevant
- appropriate
- authentic
- fair

An assessor may request additional evidence if they are not satisfied with the evidence presented by the learner. If this occurs, it may need to be agreed in partnership with the learner, the assessor and, perhaps, their employer.

## 4.3 Holistic Assessment

The approach to assessing evidence should aim to be holistic; that is, evidence in support of one unit or part of a unit may be used in part for aspects of another unit. Many of the QCF NVQ units from the Business and Administration suite are interrelated and evidence from one unit may equally be applied to part of the evidence requirements of another unit.

Using a holistic approach to assessment will:

- enrich the assessment process for the learner and the assessor by bringing together elements of different units
- make more sense to the learner and avoid duplication of assessment
- provide a rigorous approach to the assessment process



- allow for evidence for particular units to be drawn from a range of activities, thus making it easier to cover aspects that may not occur in a one-off assessment
- efficiently use assessment opportunities and reduce over-assessment
- be cost effective.

Holistic assessment will minimise repetition, time and the burden of assessment on all parties involved in the assessment process. This should not prevent individual units being signed-off as they are completed.

#### 4.4 Using other related qualifications as evidence

Other qualifications can be used as supporting evidence in a learner's portfolio. The qualification must be current and be benchmarked to one or more of the Business & Administration QCF NVQ units. However, it will only be supporting evidence, as assessors must still make judgments about how the learner demonstrates competence at work.

#### 4.5 Recognition of prior learning (RPL)

RPL recognises how the contribution of a learner's previous experience could contribute to a qualification. Should any opportunities for RPL be identified, it is important that a complete process of recognising prior experience and learning is undertaken, by ensuring that:

- it covers relevant or appropriate experience for previous activities, as well as accredited learning and qualifications
- it is incorporated into the assessment planning, with details of how this will take place
- mapping of prior learning to the national occupational standards to identify gaps is documented and auditable
- assessment methods or processes for recognising prior experience and learning, are documented and made available to the external verifier
- the audit trail covers the whole process and methodology of RPL
- the authenticity and currency of presented evidence is established by the assessor
- where observation or expert witness testimony is a unit assessment method requirement, this activity is undertaken after learner registration for the qualification

In considering the appropriateness of any single piece of **evidence**, the following should be considered:

- **Content** – the degree to which the content of any previous accredited learning meets the requirements of the national occupational standards against which it is being presented as evidence.
- **Performance and knowledge** – the degree to which the previous learning covered both performance and knowledge. Some learning will only have offered and tested the latter, in which case RPL will only recognise the meeting of knowledge requirements. Performance will require further assessment. Although unlikely, the reverse (performance tested but not knowledge) could be true in which case knowledge and understanding would need further assessment.
- **Relevance of context** – the degree to which the context of the learning gained and assessed, relates to the current context of learner' work roles. If the context was different, assessors will need to satisfy themselves of learners' ability to transfer the learning gained into their current setting.
- **Currency** – how recently the learning was gained. Learners would need to demonstrate current knowledge and understanding of areas such as legislation, policy and practice etc, which may have changes since the previous learning programmes were undertaken.
- **Authenticity** – how the ownership of the evidence is established to ensure it was generated by the learner.

## 5.0 Qualification information

### 5.1 What is the qualification and credit framework?

The qualification and credit framework (QCF) is a new way of recognising achievement through the award of credit for units and qualifications. It will provide flexible routes to gaining full qualifications and enable qualifications to be achieved in smaller steps. Units within the framework will have a level (ranging from entry level to level 8) to indicate the level of difficulty. They will also have a credit value to indicate the size of the unit.

The QCF will:

- allow providers to design more flexible programmes, suited to the needs of a wider range of learners
- describe achievements (credits) to employers, providers and learners in a way that is easy to understand
- allow learners to accumulate credit, by recognising smaller steps of learning at their own pace
- allow learners to transfer credits into an electronic learner achievement record, which they will keep for life

### 5.2 QCF units

Each unit has a credit value based on the total number of hours learning required to achieve it, (notional learning). Each 10 hours of learning equals 1 credit, for example, if a unit takes 30 hours of learning, it will receive a credit value of 3. The units vary in credit value. In addition all units have a level which may be different from the qualification in which they can be used.

### 5.3 QCF terminology

Whilst the evidence outcomes required from QCF and NVQ units are the same, the QCF units use different terminology to the NVQ units. The assessment criteria for NVQ units are listed under 'what you must do' and 'what you must know' whereas the QCF units are all listed under 'the learner can'.

### 5.4 Availability of qualifications

This handbook covers the Level 2 NVQ Certificate in Business and Administration (QCF). To complete a qualification, the minimum credit value must be achieved and progressive qualifications at a higher level require more credit to be achieved. The number of units to achieve this is not fixed, as it is the total credit value that is required. Rules of combination apply to each qualification. Learners can accumulate credit which will allow them to claim award, certificate or diploma certification, as the qualification credit values are achieved.

### 6.1 Number of credits required for each qualification

Qual. No.	Level	Qualification title	Number of credits
BAC02	2	Level 2 NVQ Certificate in Business and Administration (QCF)	Minimum of 21

## 6.2 List of available units and their credit value

The list below gives the unit titles and the credit value of each unit. Where appropriate, the final right hand column indicates the unit number(s) which can not be taken together with that particular unit within any one qualification.

### Group A - Mandatory units

QCF unit No.	Skillsfirst unit No.	Unit title	Unit level	Credit value	Barred Units
F/601/2467	BA201	Manage own performance in a business environment	2	2	-
L/601/2469	BA202	Improve own performance in a business environment	2	2	-
F/601/2470	BA203	Work in a business environment	2	2	-
D/601/2475	BA206	Communicate in a business environment	2	3	-

### Group B - Optional units

QCF unit No.	Skillsfirst unit No.	Unit title	Unit level	Credit value	Barred Units
K/601/2446	BA107	Make and receive telephone calls	1	3	-
L/601/2472	BA204	Solve business problems	2	4	-
Y/601/2474	BA205	Work with other people in a business environment	2	3	-
H/601/2476	BA207	Use electronic message systems	2	1	-
K/601/2477	BA208	Use diary systems	2	3	-
M/601/2478	BA209	Take minutes	2	4	-
T/601/2479	BA210	Handle mail	2	3	-
K/601/2480	BA211	Provide reception services	2	3	BA256
T/601/2482	BA212	Produce documents in a business environment	2	4	BA213 BA312
A/601/2483	BA213	Prepare texts from notes	2	3	BA212 BA312
F/601/2484	BA214	Prepare text from notes using touch typing (40 wpm)	2	3	BA313
J/601/2485	BA215	Prepare text from shorthand (60 wpm)	2	8	BA314
L/601/2486	BA216	Prepare text from recorded audio instruction (40 wpm)	2	4	BA315
R/601/2487	BA217	Organise and report data	2	3	-
Y/601/2488	BA218	Research information	2	4	-
R/601/2490	BA219	Store and retrieve information	2	3	-

Y/601/2491	BA220	Archive information	2	2	-
H/601/2493	BA221	Use office equipment	2	4	-
M/601/2495	BA222	Maintain and issue stationary stock items	2	3	-
L/601/2505	BA223	Support the organisation of an event	2	2	-
D/601/2508	BA224	Support the co-ordination of an event	2	3	BA320
Y/601/2510	BA225	Support the organisation of business travel or accommodation	2	3	BA321
T/601/2515	BA226	Support the organisation of meetings	2	4	BA322
F/601/2517	BA227	Respond to change in a business environment	2	3	-
J/601/2518	BA228	Support the management and development of an information system	2	7	-
Y/601/2457	BA256	Meet and welcome visitors	2	3	BA211
T/601/2790	BA290	Administer human resources records	2	3	-
A/601/2791	BA291	Administer the recruitment and selection process	2	4	-
J/601/2647	BA292	Administer parking dispensations	2	4	-
M/601/2528	BA310	Develop a presentation	3	3	-
T/601/2529	BA311	Deliver a presentation	3	3	-
M/601/2531	BA312	Design and produce documents in a business environment	3	4	BA212 BA213
T/601/2532	BA313	Prepare text from notes using touch typing (60 wpm)	3	4	BA214
A/601/2533	BA314	Prepare text from shorthand (80 wpm)	3	8	BA215
F/601/2534	BA315	Prepare text from recorded audio instruction (60 wpm)	3	4	BA216
L/601/2536	BA316	Support the design and development of an information system	3	7	-
R/601/2537	BA317	Monitor information systems	3	7	-
Y/601/2538	BA318	Analyse and report data	3	6	-
D/601/2539	BA319	Order products and services	3	5	-
R/601/2540	BA320	Plan and organise an event	3	4	BA224
Y/601/2541	BA321	Co-ordinate an event	3	4	BA225
D/601/2542	BA322	Plan and organise meetings	3	5	BA226

A/601/2547	BA326	Contribute to innovation in a business environment	3	4	-
J/601/2549	BA327	Contribute to running a project	3	5	-
A/601/2550	BA328	Deliver, monitor and evaluate customer service to internal customers	3	3	-
F/601/2551	BA329	Deliver, monitor and evaluate customer service to external customers	3	3	-
J/601/2552	BA330	Agree a budget	3	4	-

### Group C - Optional units

QCF unit No.	Skillsfirst unit No.	Unit title	Unit level	Credit value	Barred Units
T/601/2465	BA113	Use occupational and safety guidelines when using keyboards	1	2	-
A/502/4395	IT101	Bespoke software	1	2	IT201
F/502/4558	IT102	Data management software	1	2	IT202
H/502/4553	IT103	Database software	1	3	IT203
T/502/4153	IT104	Improving productivity using IT	1	3	IT204
R/502/4256	IT105	IT security for users	1	1	IT205
K/502/4621	IT106	Presentation software	1	3	IT206
Y/502/4209	IT107	Set up an IT system	1	3	IT207
A/502/4624	IT108	Spreadsheet software	1	3	IT208
A/502/4378	IT109	Using collaborative technologies	1	3	IT209
L/502/4630	IT110	Website software	1	3	IT210
L/502/4627	IT111	Word processing software	1	3	IT211
F/502/4396	IT201	Bespoke software	2	3	IT101
J/502/4559	IT202	Data management software	2	3	IT102
M/502/4555	IT203	Database software	2	4	IT103
J/502/4156	IT204	Improving productivity using IT	2	4	IT104
Y/502/4257	IT205	IT security for users	2	2	IT105
M/502/4622	IT206	Presentation software	2	4	IT106
L/502/4210	IT207	Set up an IT system	2	4	IT107
F/502/4625	IT208	Spreadsheet software	2	4	IT108
F/502/4379	IT209	Using collaborative technologies	2	4	IT109
R/502/4631	IT210	Website software	2	4	IT110
R/502/4628	IT211	Word processing software	2	4	IT111

### **6.3 Rules of combination**

To achieve this qualification the learner must complete a minimum of 21 credits of which at least 14 credits must be taken at level 2.

All 9 credits must be achieved from Group M - Mandatory Units and a minimum of 7 credits must be achieved from Group A - Optional Units. A maximum of 5 credits can be taken from Group B - Optional Units.

### **6.4 Learner entry requirements**

#### **Formal requirements**

There are no formal entry requirements for learners undertaking this qualification; however centres must ensure that learners have the potential and opportunity to gain evidence for the qualification in the work place.

#### **Age restrictions**

There are no age limits attached to learners undertaking this qualification, unless this is a legal requirement of the process or the environment.

#### **Legal considerations**

There are no formal entry requirements for learners undertaking this qualification however, centres must ensure that learners have the potential and opportunity to gain evidence for the qualification in the work place.

### **6.5 Progression opportunities**

As well as progression to further qualifications, learners may also progress to employment in a wide range of administrative roles as this qualification provides evidence of achievement of a range of practical skills, understanding and knowledge in the Business and Administration environment.

#### **From Level 2 NVQ Certificate in Business and Administration**

This qualification provides progression to the following qualifications:

Level 2 Certificate in Principles of Business and Administration

Level 3 Certificate in Principles of Business and Administration

Level 3 NVQ Diploma in Business and Administration

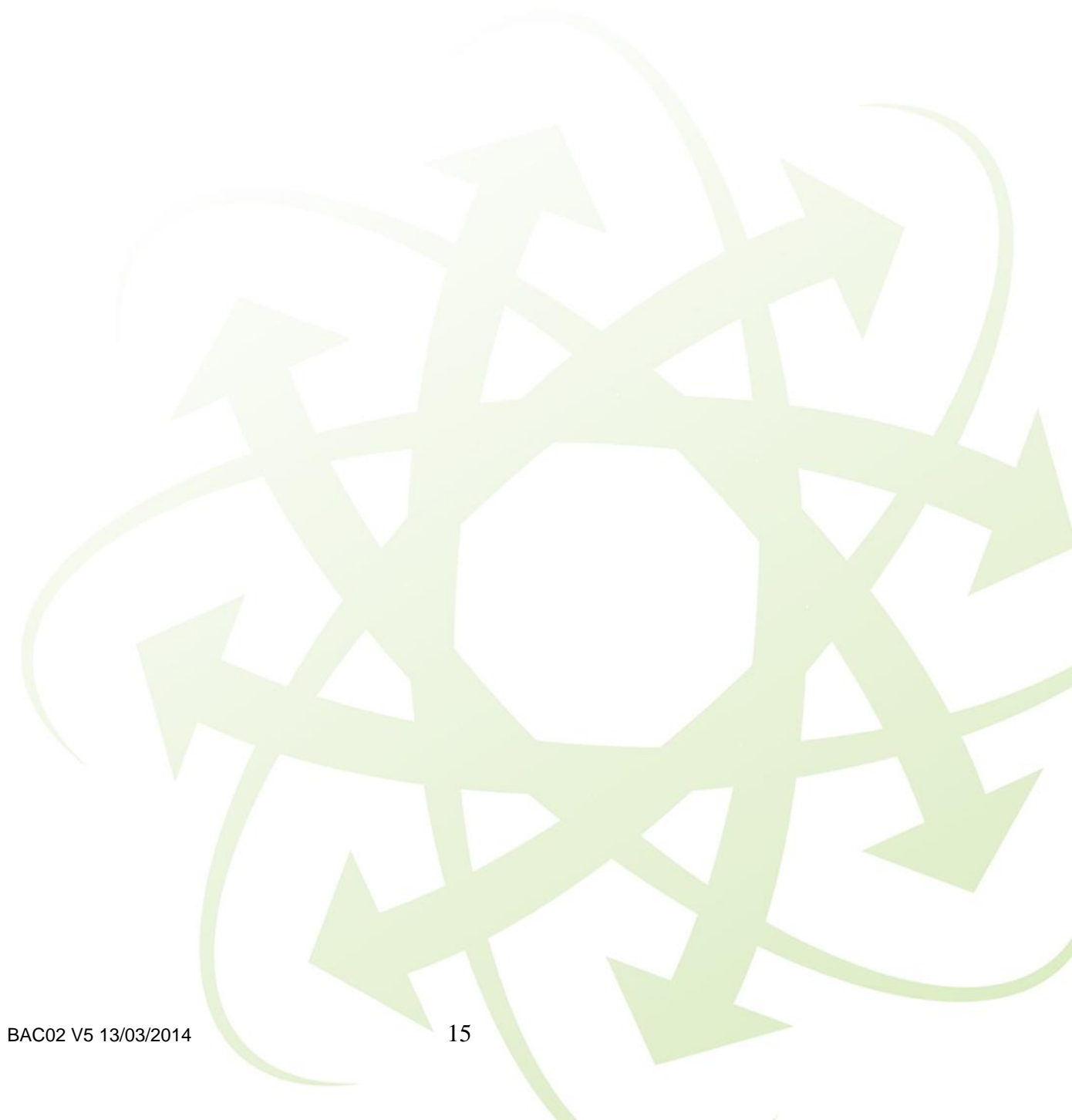
## 7.0 The units of learning

### 7.1 Structure of the units

The units in these qualifications are written in a standard format and comprise the following:

- Skillsfirst reference number
- unit title
- level and credit value
- unit aim
- learning outcomes which are comprised of a number of assessment criteria
- relationship to NOS, other qualifications and frameworks
- assessment and evidence requirements

## 7.2 Group M – mandatory units





# **BA201**

## **Manage own performance in a business environment**



## **BA201      Manage own performance in a business environment**

**Level: 2**

**Credit value: 2**

### **Unit aims**

This unit is about managing work in a way that makes sure you will be able to work effectively with other people in a business environment.

### **Learning outcomes**

There are **four** learning outcomes to this unit. The learner will:

1. Understand how to plan work and be accountable to others
2. Understand how to behave in a way that supports effective working
3. Be able to plan and be responsible for own work, supported by others
4. Behave in a way that supports effective working

### **Guided learning hours**

It is recommended that **9** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony and inspection of products, professional discussion and questioning, using evidence appropriate to the learner's job role from the following sources:

- appraisals
- performance reviews
- letters
- emails
- memos
- messages
- minutes of meetings
- to do lists
- work diaries
- action plans

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA202, BA203, BA204, BA205, BA227

## **BA201      Manage own performance in a business environment**

Learning outcomes and assessment criteria

### **Outcome 1    Understand how to plan work and be accountable to others**

The learner can:

- 1    outline guidelines, procedures codes of practice relevant to personal work
- 2    explain the purpose of planning work, and being accountable to others for own work
- 3    explain the purpose and benefits of agreeing realistic targets for work
- 4    explain how to agree realistic targets
- 5    describe ways of planning work to meet agreed deadlines
- 6    explain the purpose of keeping other people informed about progress
- 7    explain the purpose and benefits of letting other people know work plans need to be changed
- 8    describe types of problems that may occur during work
- 9    describe ways of seeking assistance with getting help to resolve problems
- 10   explain the purpose and benefits of recognising and learning from mistakes

### **Outcome 2    Understand how to behave in a way that supports effective working**

The learner can:

- 1    explain the purpose and benefits of agreeing and setting high standards for own work
- 2    describe ways of setting high standards for work
- 3    explain the purpose and benefits of taking on new challenges if they arise
- 4    explain the purpose and benefits of adapting to change
- 5    explain the purpose and benefits of treating others with honesty, respect and consideration
- 6    explain why own behaviour in the workplace is important
- 7    describe types of behaviour at work that show honesty, respect and consideration and those that do not

### **Outcome 3    Be able to plan and be responsible for own work, supported by others**

The learner can:

- 1    agree realistic targets and achievable timescales for own work
- 2    plan work tasks to make best use of own time and available resources
- 3    confirm effective working methods with others
- 4    identify and report problems occurring in own work, using the support of other people when necessary
- 5    keep other people informed of progress
- 6    complete work tasks to agreed deadlines or re-negotiate timescales and plans in good time
- 7    take responsibility for own work and accept responsibility for any mistakes made
- 8    follow agreed work guidelines, procedures and, where needed, codes of practice

### **Outcome 4    Behave in a way that supports effective working**

The learner can:

- 1    set high standards for own work and show commitment to achieving these standards
- 2    agree to take on new challenge(s) if they arise
- 3    adapt to new ways of working
- 4    treat other people with honesty, respect and consideration
- 5    help and support other people in work tasks

# BA202

Improve own performance in a business environment



## **BA202      Improve own performance in a business environment**

**Level: 2**

**Credit value: 2**

### **Unit aims**

This unit is about ways of improving work performance to be able to work more effectively with other people in a business environment, and also develop career opportunities.

### **Learning outcomes**

There are **three** learning outcomes to this unit. The learner will:

1. Understand how to improve own performance
2. Be able to improve own performance using feedback
3. Be able to agree own development needs using a learning plan

### **Guided learning hours**

It is recommended that **6** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- learning plan
- appraisal
- performance reviews

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA203, BA205

## **BA202 Improve own performance in a business environment**

Learning outcomes and assessment criteria

### **Outcome 1 Understand how to improve own performance**

The learner can:

- 1 explain the purpose and benefits of continuously improving performance at work
- 2 explain the purpose and benefits of encouraging and accepting feedback from others
- 3 explain how learning and development can improve own work, benefit organisations, and identify career options
- 4 describe possible career progression routes
- 5 describe possible development opportunities

### **Outcome 2 Be able to improve own performance using feedback**

The learner can:

- 1 encourage and accept feedback from other people
- 2 use feedback to agree ways to improve own performance in the workplace
- 3 complete work tasks, using feedback given, to improve performance

### **Outcome 3 Be able to agree own development needs using a learning plan**

The learner can:

- 1 investigate and agree where further learning and development may improve own work performance
- 2 confirm learning plan changes
- 3 follow a learning plan
- 4 review progress against learning plan and agree further learning updates, if required

# **BA203**

## **Work in a business environment**



## **BA203 Work in a business environment**

**Level: 2**

**Credit value: 2**

### **Unit aims**

This unit is about being able to behave, and carry out work tasks and procedures, in a business environment, in ways that support diversity, security and confidentiality and reduction of waste.

### **Learning outcomes**

There are **eight** learning outcomes to this unit. The learner will:

1. Understand how to respect other people at work
2. Understand how to maintain security and confidentiality at work and deal with concerns
3. Understand the purpose and procedures for keeping waste to a minimum in a business environment
4. Understand procedures for disposal of hazardous materials
5. Know how to support sustainability in an organisation
6. Be able to respect and support other people at work in an organisation
7. Be able to maintain security and confidentiality
8. Be able to support sustainability and minimise waste in an organisation

### **Guided learning hours**

It is recommended that **18** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- minutes of meetings
- memos
- emails
- appraisals
- performance reviews

Evidence generated for this unit of assessment may contribute towards other units including: Units BA201, BA202, BA205



## **BA203 Work in a business environment**

Learning outcomes and assessment criteria

### **Outcome 1 Understand how to respect other people at work**

The learner can:

- 1 describe what is meant by diversity and why it should be valued
- 2 describe how to treat other people in a way that is sensitive to their needs
- 3 describe how to treat other people in a way that respects their abilities, background, values, customs and beliefs
- 4 describe ways in which it possible to learn from others at work

### **Outcome 2 Understand how to maintain security and confidentiality at work and deal with concerns**

The learner can:

- 1 describe the purpose and benefits of maintaining security and confidentiality at work
- 2 describe requirements for security and confidentiality in an organisation
- 3 describe legal requirements for security and confidentiality, as required
- 4 describe procedures for dealing with concerns about security and confidentiality in an organisation

### **Outcome 3 Understand the purpose and procedures for keeping waste to a minimum in a business environment**

The learner can:

- 1 explain the purpose of keeping waste to a minimum
- 2 describe the main causes of waste that may occur in a business environment
- 3 describe ways of keeping waste to a minimum
- 4 identify ways of using technology to reduce waste
- 5 outline the purpose and benefits of recycling
- 6 describe organisational procedures for recycling materials

### **Outcome 4 Understand procedures for disposal of hazardous materials**

The learner can:

- 1 describe the benefits of procedures for the recycling and disposal of hazardous materials
- 2 describe organisational procedures for the recycling and disposal of hazardous materials

### **Outcome 5 Know how to support sustainability in an organisation**

The learner can:

- 1 outline the purpose of improving efficiency and minimising waste
- 2 describe ways of improving own working methods and use of technology to achieve efficiency and reduce waste

### **Outcome 6 Be able to respect and support other people at work in an organisation**

The learner can:

- 1 complete work tasks alongside other people in a way that shows respect for
  - a) backgrounds
  - b) abilities
  - c) values, customs and beliefs
- 2 complete work tasks with other people in a way that is sensitive to their needs
- 3 use feedback and guidance from other people to improve own way of working
- 4 follow organisational procedures and legal requirements in relation to discrimination legislation, as required

## **Outcome 7 Be able to maintain security and confidentiality**

The learner can:

- 1 keep property secure, following organisational procedures and legal requirements, as required
- 2 keep information secure and confidential, following organisational procedures and legal requirements
- 3 follow organisational procedures to report concerns about security / confidentiality, as required

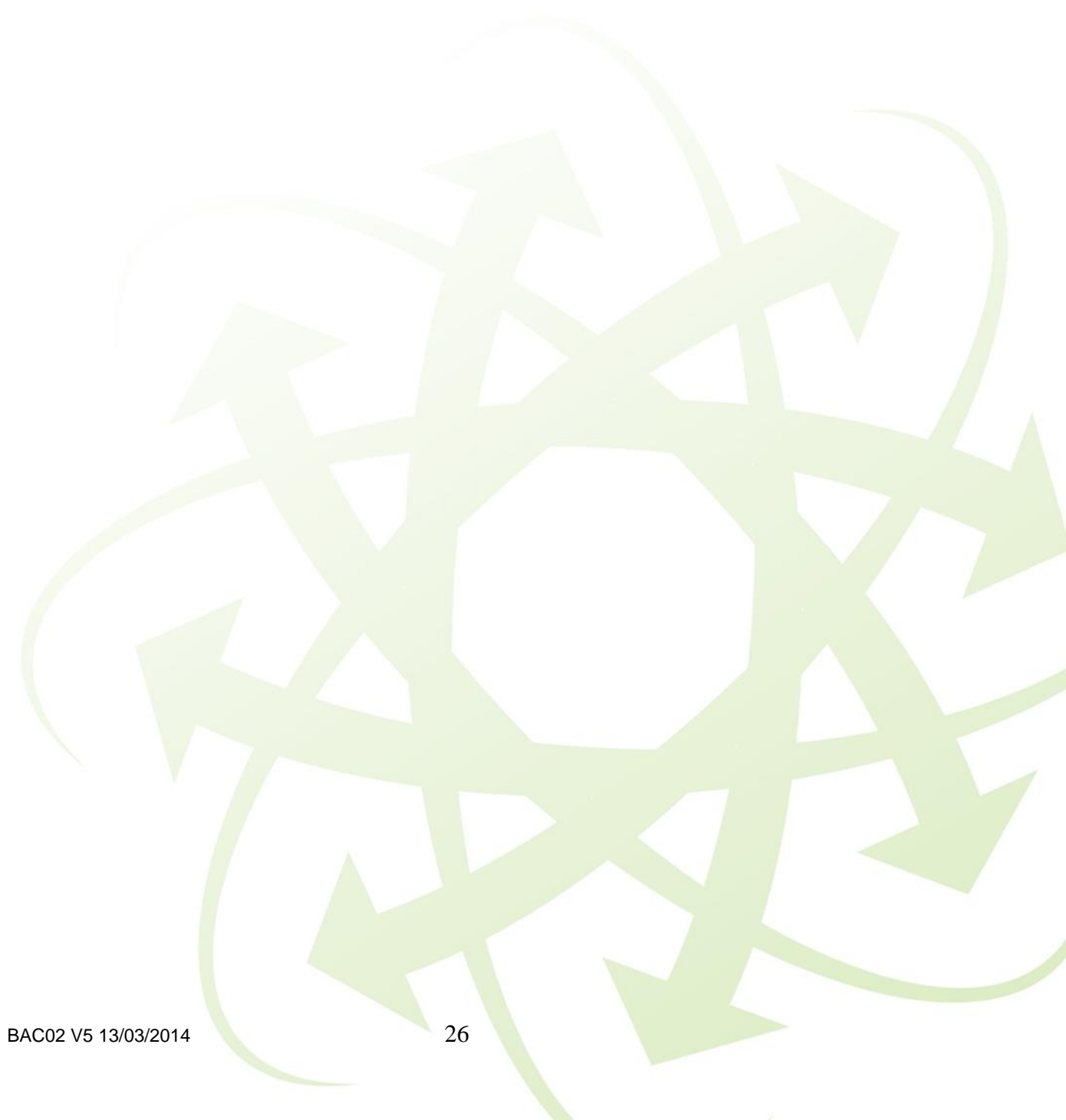
## **Outcome 8 Be able to support sustainability and minimise waste in an organisation**

The learner can:

- 1 complete work tasks, keeping waste to a minimum
- 2 use technology in work task(s) in ways that minimise waste
- 3 follow procedures for recycling and disposal of hazardous materials, as required
- 4 follow procedures for the maintenance of equipment in own work

# BA206

## Communicate in a business environment



## **BA206      Communicate in a business environment**

**Level: 2**

**Credit value: 3**

### **Unit aims**

This unit is about being able to communicate clearly and accurately, in writing and verbally, with other people in a business environment.

### **Learning outcomes**

There are **eight** learning outcomes to this unit. The learner will:

1. Know the purpose of planning communication
2. Understand how to communicate in writing
3. Know how to communicate verbally
4. Understand the purpose of feedback in developing communication skills
5. Be able to plan communication
6. Be able to communicate in writing
7. Be able to communicate verbally
8. Be able to identify and agree ways of developing communication skills

### **Guided learning hours**

It is recommended that **18** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questions, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- information formatted
- presentation
- minutes of meetings
- feedback received

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205

## **BA206 Communicate in a business environment**

Learning outcomes and assessment criteria

### **Outcome 1 Know the purpose of planning communication**

The learner can:

- 1 explain reasons for knowing the purpose of communication
- 2 explain reasons for knowing the audience to whom the communication is being presented
- 3 describe different methods of communication
- 4 describe when to use different methods of communication

### **Outcome 2 Understand how to communicate in writing**

The learner can:

- 1 identify different sources of information that may be used when preparing written communication
- 2 describe the communication principles for using electronic forms of written communication in a business environment
- 3 describe the reasons for using language that suits the purpose of written communication
- 4 describe ways of organising, structuring and presenting written information so it meets the needs of an audience
- 5 describe ways of checking for the accuracy of written information
- 6 explain the purpose of accurate use of grammar, punctuation and spelling
- 7 explain what is meant by plain English, and why it is used
- 8 explain the need to proofread and check written work
- 9 explain how to identify work that is important and work that is urgent
- 10 describe organisational procedures for saving and filing written communications

### **Outcome 3 Know how to communicate verbally**

The learner can:

- 1 describe ways of verbally presenting information and ideas clearly
- 2 explain ways of making contributions to discussions that help to move them forward
- 3 describe methods of active listening
- 4 explain the purpose of summarising verbal communications

### **Outcome 4 Understand the purpose of feedback in developing communication skills**

The learner can:

- 1 describe ways of getting feedback on communications
- 2 explain the purpose of using feedback to develop communication skills

### **Outcome 5 Be able to plan communication**

The learner can:

- 1 identify the purpose of communications and the audience(s)
- 2 select methods of communication to be used
- 3 confirm methods of communication, as required

### **Outcome 6 Be able to communicate in writing**

The learner can:

- 1 find and select information needed for written communications
- 2 organise, structure and present information so that it is clear, accurate and meets the needs of the audience
- 3 use language that suits the purpose of written communication and the audience
- 4 use accurate grammar, spelling and punctuation, and plain English to make sure that meaning is clear

- 5 proofread and check written communications and make amendments, as required
- 6 confirm what is important and what is urgent
- 7 produce written communications to meet agreed deadlines
- 8 keep a file copy of written communications sent

### **Outcome 7 Be able to communicate verbally**

The learner can:

- 1 verbally present information and ideas to others clearly and accurately
- 2 make contributions to discussion(s) that move the discussion forward
- 3 actively listen to information given by other people, and make relevant responses
- 4 ask relevant questions to clarify own understanding, as required
- 5 summarise verbal communication(s) and agree that the correct meaning has been understood

### **Outcome 8 Be able to identify and agree ways of developing communication skills**

The learner can:

- 1 get feedback to confirm whether the communication has achieved its purpose
- 2 use feedback to identify and agree ways of improving own communication skills

### 7.3 Group A – optional units



# **BA107**

## **Make and receive telephone calls**





## **BA107      Make and receive telephone calls**

**Level: 1**

**Credit value: 3**

### **Unit aims**

This unit is about making and receiving telephone calls, and transferring calls when necessary, in a business environment

### **Learning outcomes**

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

The learner will:

1. Understand how to make telephone calls
2. Understand how to receive and transfer telephone calls
3. Be able to make telephone calls
4. Be able to receive telephone calls

### **Guided learning hours**

It is recommended that **10** 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 (if appropriate)**

This unit is linked to the National Occupational Standards for Business and Administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for Business and Administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, case studies, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- memos
- emails
- telephone logs
- messages

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA101, BA102, BA103, BA105

## **BA107      Make and receive telephone calls**

Learning outcomes and assessment criteria

### **Outcome 1    Understand how to make telephone calls**

The learner can:

- 1 describe the different features of telephone systems and how to use them
- 2 give reasons for identifying the purpose of a call before making it
- 3 describe different ways of obtaining the names and numbers of people that need to be contacted
- 4 describe how to use a telephone system to make contact with people inside and outside an organisation
- 5 explain the purpose of giving a positive image of self and own organisation
- 6 explain the purpose of summarising the outcomes of a telephone conversation before ending the call
- 7 describe how to identify problems and who to refer them to
- 8 describe organisation structures and communication channels within an organisation
- 9 describe how to follow organisational procedures when making a telephone call
- 10 explain how to report telephone system faults

### **Outcome 2    Understand how to receive and transfer telephone calls**

The learner can:

- 1 describe how to identify callers and their needs
- 2 explain the purpose of giving accurate and up to date information to callers
- 3 explain the purpose of confidentiality and security when dealing with callers
- 4 describe the types of information that could affect confidentiality and security and how to handle these
- 5 describe ways of identifying the appropriate person to whom a call is transferred
- 6 describe the information to be given when transferring calls or leaving messages
- 7 describe how to identify problems and who to refer them to
- 8 describe how to follow organisational procedures when receiving a telephone call
- 9 explain how to report telephone system faults

### **Outcome 3    Be able to make telephone calls**

The learner can:

- 1 identify the purpose of the call
- 2 obtain the name and number of the person to be contacted
- 3 make contact with the person
- 4 communicate information to achieve the purpose of the call
- 5 project a positive image of self and organisation
- 6 summarise the outcomes of the conversation before ending a call
- 7 report telephone system faults, if necessary

### **Outcome 4    Be able to receive telephone calls**

The learner can:

- 1 answer a phone following organisational procedures
- 2 give a positive image of self and organisation
- 3 identify the caller, where they are calling from, and what they need
- 4 give accurate and up to date information whilst protecting confidentiality and security
- 5 transfer calls, if required
- 6 take and pass on messages according to the caller's needs
- 7 summarise the outcomes of the conversation before ending the call
- 8 report telephone system faults, if necessary

# BA204

Solve business problems



## **BA204 Solve business problems**

**Level: 2**

**Credit value: 4**

### **Unit aims**

This unit is about recognising that there is a problem with the way work is being carried out in a business environment and working with other people to agree a solution.

### **Learning outcomes**

There are **six** learning outcomes to this unit. The learner will:

- 1 Know how to recognise business problems and their causes
- 2 Understand techniques for solving business problems
- 3 Know how to review approaches and solutions to business problems
- 4 Be able to recognise business problems
- 5 Be able to plan and carry out a solution to a business problem
- 6 Be able to review a solution to the business problem

### **Guided learning hours**

It is recommended that **12** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- minutes of meetings
- memos
- emails

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205

## **BA204 Solve business problems**

Learning outcomes and assessment criteria

### **Outcome 1 Know how to recognise business problems and their causes**

The learner can:

- 1 outline ways of recognising when a business problem exists
- 2 describe how to identify possible causes of business problems

### **Outcome 2 Understand techniques for solving business problems**

The learner can:

- 1 describe different ways of solving a business problem
- 2 outline different ways of planning to solve a business problem
- 3 give reasons for having support and feedback from others when solving the business problem
- 4 explain the purpose of checking progress and adjusting approaches to solving a business problem
- 5 describe ways of recognising when a business problem has been solved

### **Outcome 3 Know how to review approaches and solutions to business problems**

The learner can:

- 1 outline ways of reviewing approaches to solving business problems
- 2 outline ways of reviewing the effectiveness of solutions to business problems

### **Outcome 4 Be able to recognise business problems**

The learner can:

- 1 identify a business problem
- 2 confirm own understanding of a business problem
- 3 work with others to agree what the business problem is

### **Outcome 5 Be able to plan and carry out a solution to a business problem**

The learner can:

- 1 agree an approach for how to solve the business problem
- 2 develop a plan to solve the business problem
- 3 identify ways of deciding that the business problem has been solved
- 4 agree approaches to solving the business problem, with others as required
- 5 carry out a plan to solve the business problem, involving others as required
- 6 use support and feedback from others to reach a solution
- 7 check progress towards solving the business problem
- 8 use feedback and progress reports to adjust the plan, as required
- 9 confirm that the business problem has been solved, with others as required

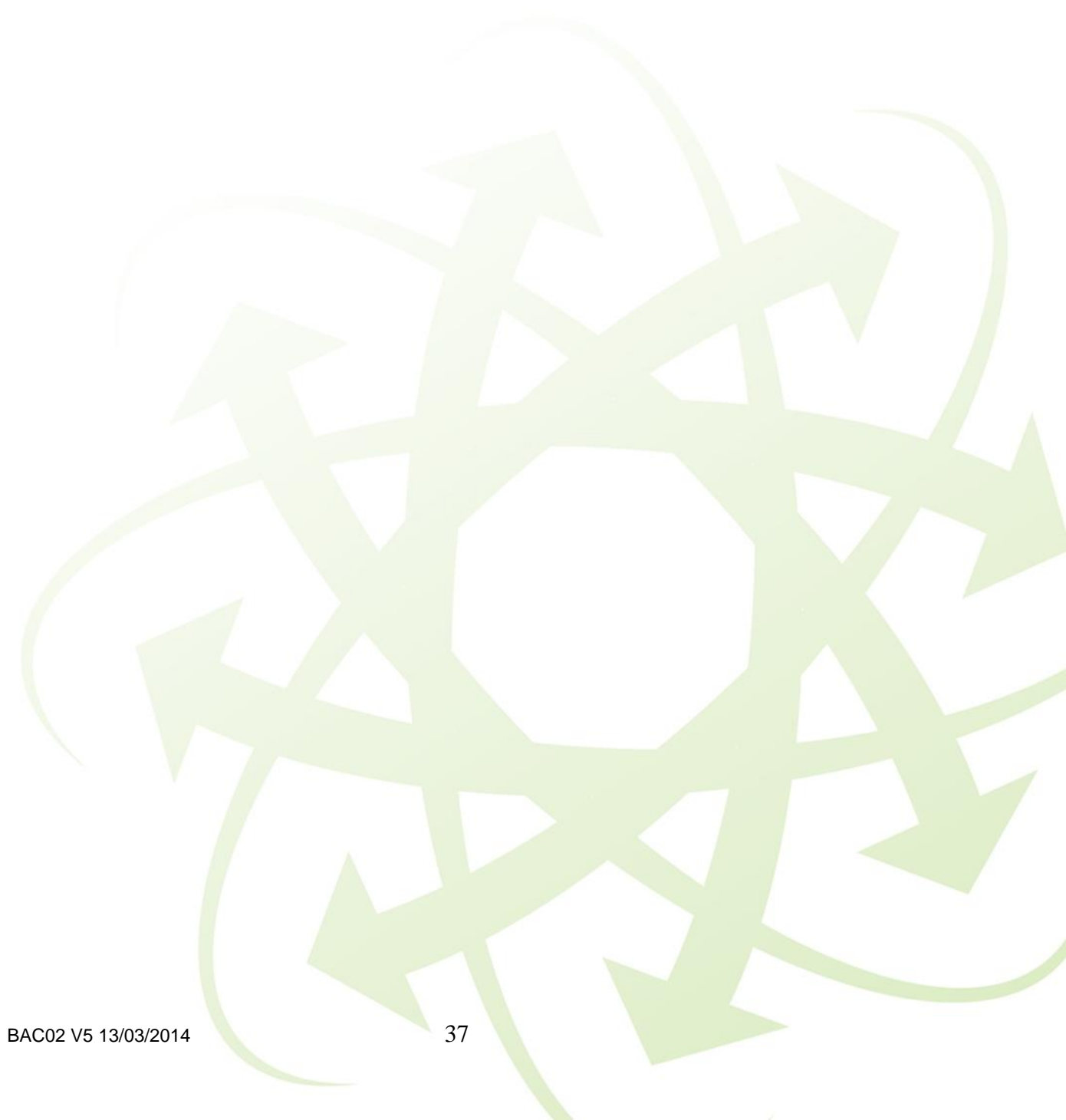
### **Outcome 6 Be able to review a solution to the business problem**

The learner can:

- 1 review an approach to solving a business problem for its effectiveness
- 2 review a solution to the business problem for its effectiveness
- 3 identify alternative approaches and solutions for possible effectiveness

# **BA205**

## **Work with other people in a business environment**



## **BA205 Work with other people in a business environment**

**Level: 2**

**Credit value: 3**

### **Unit aims**

This unit is about working within a team, sharing responsibility with others to make sure that a team can achieve agreed goals and objectives

### **Learning outcomes**

There are **ten** learning outcomes to this unit. The learner will:

1. Understand how your role fits with organisational values and practices
2. Understand how to work as part of a team to achieve goals and objectives
3. Understand how to communicate as part of a team
4. Understand the contribution of individuals within a team
5. Understand how to deal with problems and disagreements
6. Understand the purpose of feedback when working as a team
7. Be able to work in a way that fits with organisational values and practices
8. Be able to work in a team to achieve goals and objectives
9. Be able to deal with or refer problems in a team
10. Be able to use feedback on objectives in a team

### **Guided learning hours**

It is recommended that **10** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- minutes of meetings
- memos
- emails
- appraisals
- performance reviews

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203

## **BA205 Work with other people in a business environment**

Learning outcomes and assessment criteria

### **Outcome 1 Understand how your role fits with organisational values and practices**

The learner can:

- 1 describe the sector in which your organisation operates
- 2 describe your organisation's missions and purpose
- 3 compare your organisation to other types of organisation in your sector
- 4 outline your responsibilities
- 5 describe how your role fits into your organisation's structure
- 6 describe how your role contributes to the organisation's operations
- 7 outline the policies, procedures, systems and values of your organisation that are relevant to your role
- 8 outline who you would consult if unsure about organisational policies, procedures, systems and values

### **Outcome 2 Understand how to work as part of a team to achieve goals and objectives**

The learner can:

- 1 explain the purpose of working with other people to achieve goals and objectives
- 2 identify situations in which working with others can achieve positive results
- 3 explain the purpose and benefits of agreeing work goals and plans when working with others
- 4 describe situations in which team members might support each other
- 5 describe ways of providing support to other people in a team
- 6 explain the purpose of agreeing quality measures with a team

### **Outcome 3 Understand how to communicate as part of a team**

The learner can:

- 1 explain the purpose of communicating with other people in a team
- 2 identify different methods of communication and when to use them

### **Outcome 4 Understand the contribution of individuals within a team**

The learner can:

- 1 explain the purpose of recognising the strengths of others
- 2 explain the value of diversity within teams
- 3 explain the purpose of respecting individuals working within a team

### **Outcome 5 Understand how to deal with problems and disagreements**

The learner can:

- 1 describe the types of problems and disagreements that may occur when working with other people in a team
- 2 describe ways of dealing with problems and disagreements when working with other people in a team

### **Outcome 6 Understand the purpose of feedback when working as a team**

The learner can:

- 1 explain the purpose of giving and receiving constructive feedback
- 2 describe ways of using feedback to improve own work, and a team as a whole



## **Outcome 7 Be able to work in a way that fits with organisational values and practices**

The learner can:

- 1 follow organisational policies, systems and procedures relevant to your role
- 2 apply relevant organisational values across all aspects of your work
- 3 work with outside organisations and individuals in a way that protects the image of your organisation, when relevant
- 4 seek guidance when unsure about organisational policies, systems, procedures and values

## **Outcome 8 Be able to work in a team to achieve goals and objectives**

The learner can:

- 1 communicate effectively with other people in a team
- 2 contribute to the agreement of work objectives and quality measures with a team, to achieve a positive outcome
- 3 make sure work goals and objectives are achieved in a way that makes best use of own abilities in a team
- 4 provide support to members of a team, if required
- 5 show respect for individuals in a team
- 6 make sure own work meets agreed quality standards and is on time

## **Outcome 9 Be able to deal with or refer problems in a team**

The learner can:

- 1 identify problem(s) or disagreement(s) in a team
- 2 resolve problem(s) or disagreement(s) within limits of own authority and experience
- 3 refer problems, as required

## **Outcome 10 Be able to use feedback on objectives in a team**

The learner can:

- 1 contribute to providing constructive feedback on the achievement of objectives to a team
- 2 receive constructive feedback on own work
- 3 use feedback on achievement of objectives to

# BA207

## Use electronic message systems



## **BA207 Use electronic message systems**

**Level: 2**

**Credit value: 1**

### **Unit aims**

This unit is about organising and updating messages using an electronic message system

### **Learning outcomes**

There are **two** learning outcomes to this unit. The learner will:

1. Understand the use of electronic message systems
2. Be able to use electronic message systems

### **Guided learning hours**

It is recommended that **6** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- messages

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205

## **BA207 Use electronic message systems**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the use of electronic message systems**

The learner can:

- 1 describe the main types of electronic message systems
- 2 describe the different features of electronic message systems
- 3 explain the purpose of keeping an electronic message system up to date
- 4 describe how to use an electronic message system to check and delete or discard messages
- 5 explain the purpose of leaving clear messages for others

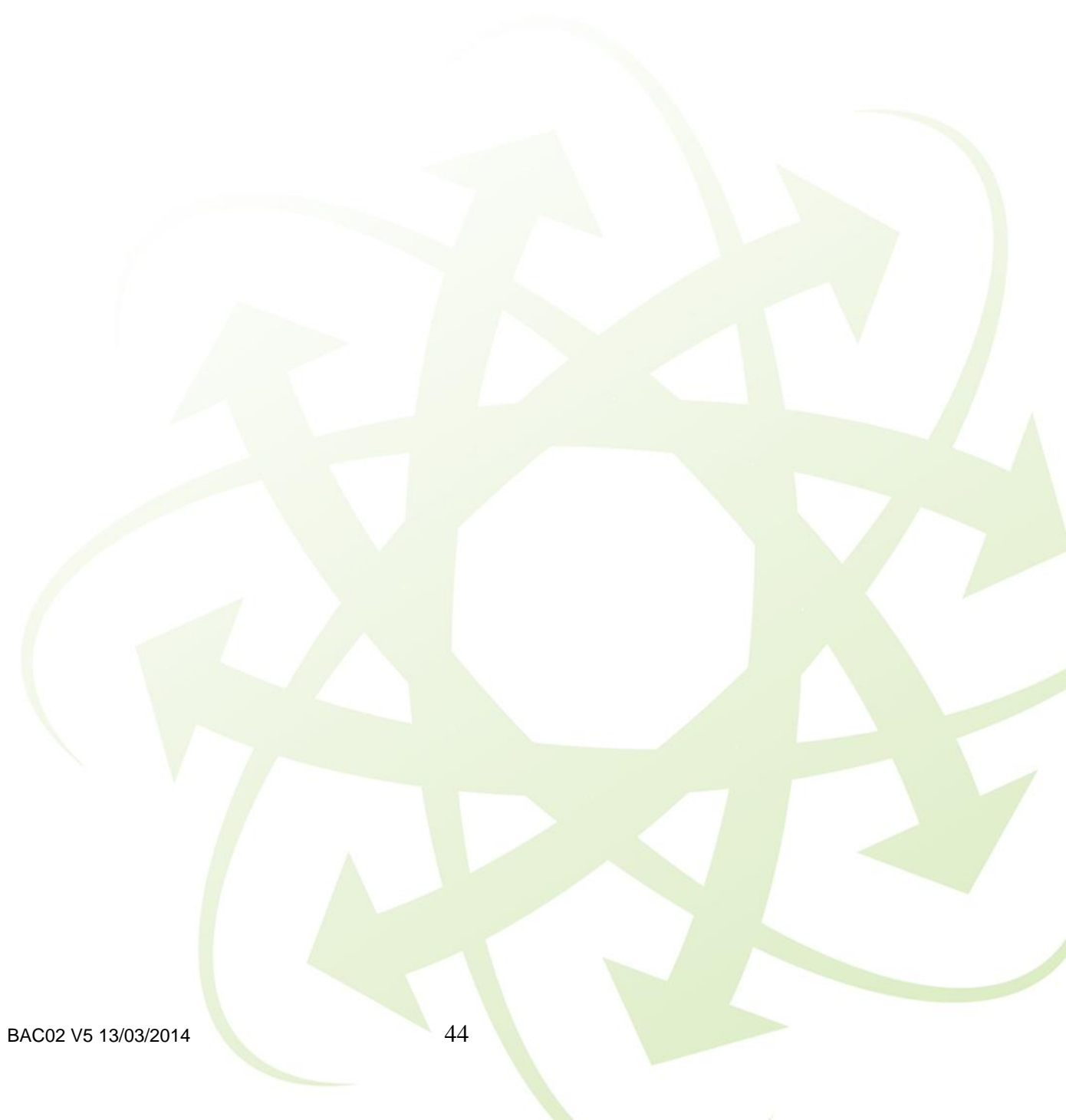
### **Outcome 2 Be able to use electronic message systems**

The learner can:

- 1 keep a message system up to date
- 2 check system for messages
- 3 respond to messages within agreed timescales
- 4 delete messages when dealt with
- 5 select the information to be given when taking or leaving messages
- 6 leave messages on other people's systems, if required

# BA208

## Use a diary system



## **BA208 Use a diary system**

**Level: 2**

**Credit value: 3**

### **Unit aims**

This unit is about using a diary system to organise and record work activities so that planned work can take place

### **Learning outcomes**

There are three learning outcomes to this unit. The learner will:

1. Understand a diary system
2. Understand how to use a diary system
3. Be able to use a diary system

### **Guided learning hours**

It is recommended that **9** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony and inspection of products, candidate reports/reflective accounts, professional discussion and questioning using evidence appropriate to the learner's job role from the following sources:

- diary
- letters
- emails
- memos

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA203, BA204, BA205

## **BA208 Use a diary system**

Learning outcomes and assessment criteria

### **Outcome 1 Understand a diary system**

The learner can:

- 1 explain the purpose of using a diary system
- 2 describe different types of diary systems
- 3 describe the purpose of obtaining relevant information about requested diary entries and changes

### **Outcome 2 Understand how to use a diary system**

The learner can:

- 1 describe the types of information needed for diary entries
- 2 explain how to prioritise requests
- 3 explain the purpose of prioritising requests
- 4 explain the purpose of trying to balance the needs of all those involved
- 5 explain the purpose of communicating changes to those affected
- 6 explain the purpose of keeping a diary system up to date
- 7 describe the different types of problems that may occur when new requests are made and solutions to these problems
- 8 explain the purpose of following security and confidentiality procedures when using a diary system

### **Outcome 3 Be able to use a diary system**

The learner can:

- 1 obtain information needed to make diary entries
- 2 make diary entries accurately and clearly
- 3 prioritise changes to entries, as required
- 4 record agreed changes in the diary
- 5 identify and report the effects of any changes for existing entries
- 6 solve problems by negotiating alternative arrangements, when necessary
- 7 keep a diary up to date and store it securely

**BA209**

Take minutes





## **BA209      Take minutes**

**Level: 2**

**Credit value: 4**

### **Unit aims**

This unit is about taking minutes at different kinds of meetings, where an accurate record is needed of decisions made and actions agreed

### **Learning outcomes**

There are **five** learning outcomes to this unit. The learner will:

1. Understand the task of taking minutes at meetings
2. Understand the role of the chair and other formal responsibilities in meetings
3. Know how to take minutes at meetings
4. Be able to prepare for taking minutes
5. Be able to minute meetings

### **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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- notes of meeting
- minutes of meeting
- letters
- emails
- memos
- minutes
- agenda

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA203, BA204, BA205

## **BA209 Take minutes**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the task of taking minutes at meetings**

The learner can:

- 1 describe the purpose of meetings
- 2 describe legal and organisational requirements that may apply to minute taking
- 3 explain the purpose of minutes as an accurate record of discussions and decisions
- 4 describe the purpose of documents and terms that are commonly used in meetings

### **Outcome 2 Understand the role of the chair and other formal responsibilities in meetings**

The learner can:

- 1 explain the role of the chair and other formal responsibilities within meetings
- 2 describe how to work in partnership with the chair when taking minutes

### **Outcome 3 Know how to take minutes at meetings**

The learner can:

- 1 explain the purpose of listening actively when taking minutes
- 2 explain how to listen actively when minute taking
- 3 describe how to take notes during discussions held at meetings
- 4 explain the purpose of getting clarification
- 5 describe how to get clarification
- 6 describe different types of minutes and their purpose
- 7 describe the different styles of writing that may be used in minute taking
- 8 explain how to sort, select and structure information to produce minutes
- 9 explain what is meant by using the correct tone and professional language in minutes

### **Outcome 4 Be able to prepare for taking minutes**

The learner can:

- 1 prepare for taking minutes, as required
- 2 communicate with the meeting chair, as required
- 3 note any changes to the agenda, matters arising and action points from last meeting

### **Outcome 5 Be able to minute meetings**

The learner can:

- 1 take notes at a meeting of all items required
- 2 produce accurate minutes that record the meaning of discussions and decisions taken
- 3 make sure minutes are in the agreed style
- 4 make sure the process for signing off minutes and / or action points has been agreed
- 5 check minutes and make necessary amendments
- 6 agree minutes with the relevant people and circulate them within the agreed timescales
- 7 follow organisational requirements for confidentiality and security of information, as required
- 8 make sure follow-up actions, and who is responsible for taking the actions, have been clearly identified
- 9 store notes and minutes following organisational procedures
- 10 follow legal and organisational requirements for minute taking, as necessary

# **BA210**

## Handle mail



## **BA210 Handle mail**

**Level: 2**

**Credit value: 3**

### **Unit aims**

This unit is about handling internal and external mail and packages within the service requirements of an organisation

### **Learning outcomes**

There are **five** learning outcomes to this unit. The learner will:

1. Understand security procedures when handling mail or packages
2. Understand the range of available internal and external mail services
3. Be able to receive, distribute and collect internal mail or packages
4. Be able to follow procedures for despatching mail or packages
5. Be able to resolve, report or refer problems that may occur in handling mail or packages

### **Guided learning hours**

It is recommended that **17** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- mail records
- log book – special deliveries

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205

## **BA210 Handle mail**

Learning outcomes and assessment criteria

### **Outcome 1 Understand security procedures when handling mail or packages**

The learner can:

- 1 explain the purpose of security procedures for handling mail or packages
- 2 give examples of security procedures for handling mail in organisation(s)

### **Outcome 2 Understand the range of available internal and external mail services**

The learner can:

- 1 explain the purpose of distributing and dispatching mail to the correct recipient within agreed timescales
- 2 state the organisational structure and names, roles and locations of individuals and teams
- 3 give examples of internal and external mail services available to organisations
- 4 give reasons for selecting internal and external mail services
- 5 describe the methods of calculating postage charges for mail or packages
- 6 describe the types of problems that may occur with incoming and outgoing mail and how to deal with these

### **Outcome 3 Be able to receive, distribute and collect internal mail or packages**

The learner can:

- 1 receive, check and sort incoming mail or packages identify and deal with unwanted junk mail or damaged items
- 2 identify and deal with suspicious items
- 3 distribute incoming mail or packages
- 4 collect, sort and prioritise outgoing mail or packages

### **Outcome 4 Be able to follow procedures for despatching mail or packages**

The learner can:

- 1 identify best options for despatching mail
- 2 agree a cost for despatching mail or packages
- 3 arrange services to collect outgoing mail or packages, if required
- 4 identify and prepare items for urgent or special delivery, where necessary
- 5 calculate correct postage charges for outgoing mail or packages
- 6 record postage costs
- 7 despatch outgoing mail or packages to agreed timescale

### **Outcome 5 Be able to resolve, report or refer problems that may occur in handling mail or packages**

The learner can:

- 1 identify where a problem may exist with incoming and outgoing mail or packages
- 2 resolve, report or refer problems with incoming and outgoing mail or packages

# BA211

## Provide reception services



## **BA211 Provide reception services**

**Level: 2**

**Credit value: 3**

### **Unit aims**

This unit is about providing a reception service in a business environment, acting as the first point of contact between a business, its clients and the public.

### **Learning outcomes**

There are **four** learning outcomes to this unit. The learner will:

1. Understand the purpose of reception services in a business environment
2. Understand the procedures to be followed when providing reception services
3. Understand ways of improving reception services and developing own role
4. Provide a reception service

### **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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205, BA256

## **BA211 Provide reception services**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the purpose of reception services in a business environment**

The learner can:

- 1 explain the purpose of the receptionist role as the first point of contact between the public / client and an organisation
- 2 explain the purpose of presenting a positive image of self and the organisation
- 3 explain how to present a positive image of self and the organisation

### **Outcome 2 Understand the procedures to be followed when providing reception services**

The learner can:

- 1 describe the structure and lines of communication in an organisation
- 2 explain how the structure in an organisation affects lines of communication
- 3 explain the purpose of entry, departure, security and confidentiality procedures, including own responsibilities
- 4 explain how to carry out entry, departure, security and confidentiality procedures in a reception area
- 5 explain the purpose of health and safety procedures when providing a reception service, including own responsibilities
- 6 explain how to carry out health and safety procedures in a reception area
- 7 describe the emergency procedures and your role within them
- 8 describe the types of problems that may occur with visitors including, conflict and aggression
- 9 aggression
- 10 explain ways of dealing with problems and when to refer them to an appropriate colleague

### **Outcome 3 Understand ways of improving reception services and developing own role**

The learner can:

- 1 explain the purpose of suggesting ideas for improving a reception area
- 2 explain the purpose of carrying out additional duties, if applicable, and give examples

### **Outcome 4 Provide a reception service**

The learner can:

- 1 present a positive image of self and the organisation
- 2 provide individuals with requested information and other useful information, within guidelines on confidentiality
- 3 follow entry and exit security procedures, if required
- 4 follow relevant health and safety procedures
- 5 deal with problems that may occur, if necessary
- 6 refer problems, as required
- 7 make sure a reception area gives a positive image of the organisation
- 8 make suggestions for improving a reception area, as required
- 9 follow organisational procedures in the event of an accident or emergency, as required
- 10 look for and complete additional task(s) during quiet periods, as required



# **BA212**

## **Produce documents in a business environment**



## **BA212 Produce documents in a business environment**

**Level: 2**

**Credit value: 4**

### **Unit aims**

This unit is about preparing high quality and attractive documents to agreed layouts, formats, styles to meet agreed deadlines

### **Learning outcomes**

There are **five** learning outcomes to this unit. The learner will:

1. Understand the purpose of producing high quality and attractive documents in a business environment
2. Know the resources and technology available and how to use them when producing documents in a business environment
3. Understand the purpose of following procedures when producing documents in a business environment
4. Be able to prepare for tasks
5. Be able to produce documents to agreed specifications

### **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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- documents produced

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205

## **BA212 Produce documents in a business environment**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the purpose of producing high quality and attractive documents in a business environment**

The learner can:

- 1 outline different types of documents that may be produced and the different styles that could be used
- 2 describe different formats in which text may be presented
- 3 explain the purpose and benefits of producing high quality and attractive documents

### **Outcome 2 Know the resources and technology available and how to use them when producing documents in a business environment**

The learner can:

- 1 describe the types of resources available for producing high quality and attractive documents
- 2 outline ways of using different resources to produce documents
- 3 describe different types of technology available for inputting, formatting and editing text, and their main features

### **Outcome 3 Understand the purpose of following procedures when producing documents in a business environment**

The learner can:

- 1 explain the benefits of agreeing the purpose, content, style, and deadlines for producing documents
- 2 outline different ways of organising content needed for documents
- 3 outline ways of integrating and laying out text and non-text
- 4 describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so
- 5 explain the purpose of storing documents safely and securely, and ways of doing so
- 6 explain the purpose of confidentiality and data protection when preparing documents
- 7 explain the purpose and benefits of meeting deadlines

### **Outcome 4 Be able to prepare for tasks**

The learner can:

- 1 confirm the purpose, content, style and deadlines for documents

### **Outcome 5 Be able to produce documents to agreed specifications**

The learner can:

- 1 prepare resources needed to produce documents
- 2 organise the content required to produce documents
- 3 make use of technology, as required
- 4 Format and produce documents to an agreed style
- 5 integrate non-text objects into an agreed layout, if required
- 6 check texts for accuracy
- 7 edit and correct texts, as required
- 8 clarify document requirements, when necessary
- 9 store documents safely and securely following organisational procedures
- 10 present documents to the required format and within the agreed deadlines

# BA213

Prepare texts from notes



## **BA213 Prepare texts from notes**

**Level: 2**

**Credit value: 3**

### **Unit aims**

This unit is about assisting with receiving, distributing or collecting internal and external mail or packages

### **Learning outcomes**

There are **four** learning outcomes to this unit. The learner will:

1. Understand preparing text from notes
2. Understand the purpose and benefits of following procedures when preparing text from notes
3. Be able to prepare for text from notes
4. Be able to prepare text from notes

### **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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205

## **BA213 Prepare texts from notes**

Learning outcomes and assessment criteria

### **Outcome 1 Understand preparing text from notes**

The learner can:

- 1 describe different types of documents that may be produced from notes and the formats to be followed
- 2 explain the difference between producing text from own notes and producing text from others' notes

### **Outcome 2 Understand the purpose and benefits of following procedures when preparing text from notes**

The learner can:

- 1 explain the benefits of agreeing the purpose, format and deadline for preparing text from notes
- 2 explain the purpose of accuracy - including spelling, grammar and punctuation - when preparing text from notes
- 3 describe ways of checking finished documents for accuracy and correctness, and the purpose of doing so
- 4 explain the purpose of storing text and notes safely and securely, and ways of doing so
- 5 explain the purpose of confidentiality and data protection when preparing text from notes
- 6 explain the purpose and benefits of meeting deadlines

### **Outcome 3 Be able to prepare for text from notes**

The learner can:

- 1 agree the purpose, format and deadlines for texts

### **Outcome 4 Be able to prepare text from notes**

The learner can:

- 1 input text using keyboard skills
- 2 format text to agreed style and layout, making efficient use of available technology
- 3 clarify text requirements when necessary
- 4 read and check texts for accuracy
- 5 edit and correct texts, as required
- 6 store texts and original notes safely and securely following organisational procedures
- 7 produce texts to the required format and within agreed deadlines

## **BA214**

Prepare text from notes using touch typing  
(40 wpm)

## **BA214 Prepare text from notes using touch typing (40 wpm)**

**Level: 2**

**Credit value: 3**

### **Unit aims**

This unit is about preparing different types of text using touch typing at a minimum speed of 40 words per minute

### **Learning outcomes**

There are **four** learning outcomes to this unit. The learner will:

1. Understand the task of preparing text from notes using touch typing
2. Understand the purpose and benefits of following procedures when preparing text using touch typing
3. Be able to prepare for tasks
4. Be able to produce texts using touch typing

### **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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205



## **BA214 Prepare text from notes using touch typing (40 wpm)**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the task of preparing text from notes using touch typing**

The learner can:

- 1 describe different types of documents that may be produced from notes and the formats to be followed
- 2 describe different forms in which texts may be presented
- 3 explain the difference between producing text from own notes and producing text from others' notes

### **Outcome 2 Understand the purpose and benefits of following procedures when preparing text using touch typing**

The learner can:

- 1 explain the value and benefits of agreeing the purpose, format and deadline for delivering text
- 2 explain the purpose of accuracy - including spelling, grammar and punctuation - when preparing text typed from notes
- 3 describe ways of checking finished documents for accuracy and correctness
- 4 explain the purpose of storing text and original notes safely and securely, and ways of doing so
- 5 explain the purpose of confidentiality and data protection when preparing text from notes
- 6 explain the purpose of meeting deadlines

### **Outcome 3 Be able to prepare for tasks**

The learner can:

- 1 agree the purpose, format and deadlines for texts

### **Outcome 4 Be able to produce texts using touch typing**

The learner can:

- 1 input texts using touch typing to a minimum speed of 40 words per minute
- 2 format texts to agreed style and layout making efficient use of available technology
- 3 clarify text requirements when necessary
- 4 read and check texts for accuracy
- 5 edit and correct texts, as required
- 6 store texts and original notes safely and securely following organisational procedures
- 7 present texts to the required format, within the agreed deadlines

## **BA215**

Prepare text from shorthand (60wpm)

## **BA215 Prepare text from shorthand (60wpm)**

**Level: 2**

**Credit value: 8**

### **Unit aims**

This unit is about preparing different types of text from shorthand notes, where the notes are taken at a minimum speed of 60 words per minute

### **Learning outcomes**

There are **four** learning outcomes to this unit. The learner will:

1. Understand the task of preparing text from shorthand
2. Understand the purpose and value of following procedures when preparing text from shorthand
3. Be able to prepare for tasks, and use shorthand to take dictation
4. Be able to produce texts from shorthand

### **Guided learning hours**

It is recommended that **55** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- documents produced

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205

## **BA215 Prepare text from shorthand (60wpm)**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the task of preparing text from shorthand**

The learner can:

- 1 describe different types of documents that may be produced from shorthand and the formats to be followed
- 2 describe different forms in which texts may be presented

### **Outcome 2 Understand the purpose and value of following procedures when preparing text from shorthand**

The learner can:

- 1 explain the value and benefits of agreeing the purpose, format and deadline for preparing texts from shorthand
- 2 describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so
- 3 explain the purpose of storing texts and original shorthand notes safely and securely, and ways of doing so
- 4 explain the purpose of confidentiality and data protection when preparing texts from shorthand notes
- 5 explain the purpose and benefits of meeting deadlines

### **Outcome 3 Be able to prepare for tasks, and use shorthand to take dictation**

The learner can:

- 1 agree the purpose, format, and deadlines for preparing texts from shorthand
- 2 take dictation using shorthand at a minimum speed of 60 words per minute

### **Outcome 4 Be able to produce texts from shorthand**

- 1 clarify text requirements, when necessary
- 2 input and format texts to an agreed format from shorthand notes
- 3 make efficient use of technology, as required
- 4 read and check texts for accuracy
- 5 edit and correct texts, as required
- 6 store texts and original shorthand notes safely and securely following organisational procedures
- 7 present texts to the required format and within the agreed deadlines

## **BA216**

**Prepare text from recorded audio instruction  
(40wpm)**

## **BA216 Prepare text from recorded audio instruction (40wpm)**

**Level: 2**

**Credit value: 4**

### **Unit aims**

This unit is about preparing different types of text from audio recordings, where the recording is made at a minimum speed of 40 words per minute.

### **Learning outcomes**

There are **three** learning outcomes to this unit. The learner will:

1. Understand the task of preparing text from recorded audio instruction
2. Understand the purpose and value of following procedures when preparing text from recorded audio instruction
3. Be able to produce texts from audio recordings

### **Guided learning hours**

It is recommended that **35** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for Business and Administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- documents produced

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205

## **BA216 Prepare text from recorded audio instruction (40wpm)**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the task of preparing text from recorded audio instruction**

The learner can:

- 1 describe different types of documents that may be produced from recorded audio and the formats to be followed
- 2 describe different forms in which texts may be presented
- 3 describe the different types of technology that are available for playing back recordings and their main features

### **Outcome 2 Understand the purpose and value of following procedures when preparing text from recorded audio instruction**

The learner can:

- 1 explain the value and benefits of agreeing the purpose, format and deadline for preparing texts from recorded audio instruction
- 2 describe ways of checking finished documents for accuracy - including spelling, grammar and punctuation - and correctness, and the purpose of doing so
- 3 explain the purpose of storing texts and original recordings safely and securely, and ways of doing so
- 4 explain the purpose of confidentiality and data protection when preparing texts from recorded audio
- 5 explain the purpose and benefits of meeting deadlines

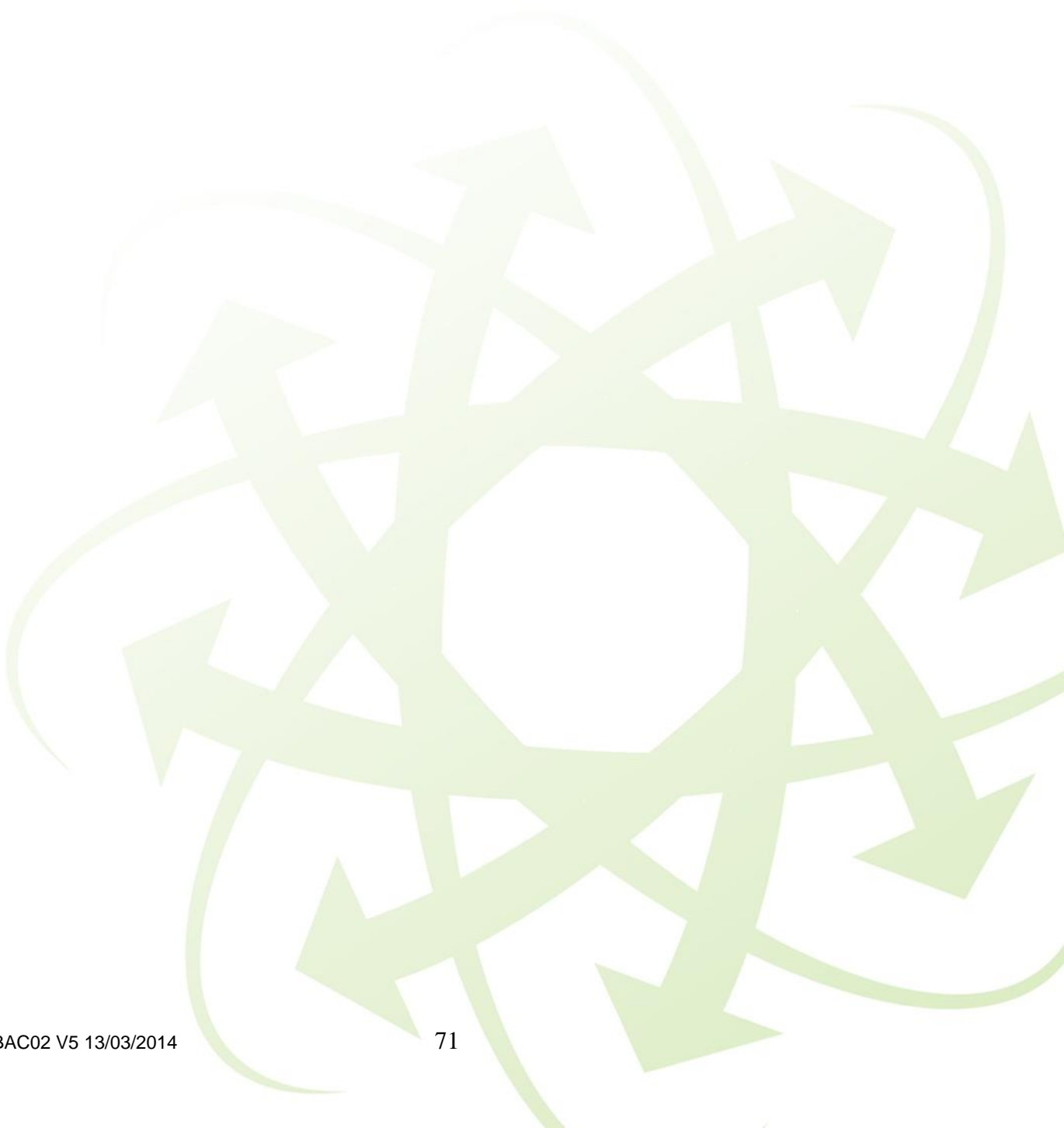
### **Outcome 3 Be able to produce texts from audio recordings**

**The learner can:**

- 1 agree the purpose, format, and deadlines for texts
- 2 input text from audio recordings at a minimum speed of 40 words per minute
- 3 format texts to agreed format making efficient use of available technology
- 4 clarify text requirements when necessary
- 5 read and check texts for accuracy
- 6 edit and correct texts, as required
- 7 store texts and original recordings safely and securely following organisational procedures
- 8 present texts to the required format and within the agreed deadlines

# BA217

## Organise and report data





## **BA217 Organise and report data**

**Level: 2**

**Credit value: 3**

### **Unit aims**

This unit is about organising and reporting data to the agreed format and timescales

### **Learning outcomes**

There are **three** learning outcomes to this unit. The learner will:

1. Understand how to organise and report data that has been researched
2. Be able to organise data
3. Be able to report data

### **Guided learning hours**

It is recommended that **12** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- examples of data
- feedback obtained

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205

**BA217 Organise and report data**  
Learning outcomes and assessment criteria

**Outcome 1 Understand how to organise and report data that has been researched**

The learner can:

- 1 describe different ways of organising data that has been researched
- 2 describe different ways of reporting data
- 3 describe the purpose of presenting data to the agreed format and timescale

**Outcome 2 Be able to organise data**

The learner can:

- 1 organise data so that it can be reported
- 2 check the accuracy of the data, and make adjustments, if required
- 3 obtain feedback on data collected, if required

**Outcome 3 Be able to report data**

The learner can:

- 1 present data in agreed format
- 2 present data to agreed timescale

# BA218

## Research information



## **BA218      Research information**

**Level: 2**

**Credit value: 4**

### **Unit aims**

This unit is about organising suitable data that has been researched using different sources of information

### **Learning outcomes**

There are **two** learning outcomes to this unit. The learner will:

1. Understand procedures for researching information
2. Be able to research information for others

### **Guided learning hours**

It is recommended that **17** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- notes of informal meetings
- records

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205, BA217

## **BA218      Research information**

Learning outcomes and assessment criteria

### **Outcome 1    Understand procedures for researching information**

The learner can:

- 1    give reasons for agreeing objectives and deadlines for researching information
- 2    give reasons for identifying and agreeing sources of information
- 3    explain the purpose of recording and storing information researched

### **Outcome 2    Be able to research information for others**

The learner can:

- 1    agree aims, objectives and deadlines for the information search
- 2    identify sources of information
- 3    search for and obtain data
- 4    check that data is suitable for the purpose of the research
- 5    record the data and store it securely
- 6    make a record of information sources used
- 7    meet deadlines for completing research

# BA219

## Store and retrieve information



## **BA219 Store and retrieve information**

**Level: 2**

**Credit value: 3**

### **Unit aims**

This unit is about storing and retrieving information securely and within confidentiality requirements of the organisation

### **Learning outcomes**

There are **three** learning outcomes to this unit. The learner will:

1. Understand processes and procedures for storing and retrieving information
2. Be able to store information
3. Be able to retrieve information

### **Guided learning hours**

It is recommended that **17** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- information

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205, BA220

## **BA219 Store and retrieve information**

Learning outcomes and assessment criteria

### **Outcome 1 Understand processes and procedures for storing and retrieving information**

The learner can:

- 1 explain the purpose of storing and retrieving required information
- 2 describe different information systems and their main features
- 3 explain the purpose of legal and organisational requirements for the security and confidentiality of information
- 4 explain the purpose of confirming information to be stored and retrieved
- 5 describe ways of checking information for accuracy
- 6 explain the purpose of checking information for accuracy
- 7 explain the purpose of providing information to agreed format and timescales
- 8 describe the types of information that may be deleted
- 9 describe problems that may occur with information systems and how to deal with them, when necessary

### **Outcome 2 Be able to store information**

The learner can:

- 1 identify, confirm and collect information to be stored
- 2 follow legal and organisational procedures for security and confidentiality of information to be stored
- 3 store information in approved locations
- 4 check and update stored information, if required
- 5 delete stored information, if required
- 6 deal with, or refer problems, if required

### **Outcome 3 Be able to retrieve information**

The learner can:

- 1 confirm and identify information to be retrieved
- 2 follow legal and organisational procedures for security and confidentiality of information
- 3 locate and retrieve the required information
- 4 check and update information, if required
- 5 provide information in the agreed format and timescale
- 6 deal with, or refer problems if required



# BA220

## Archive information



## **BA220      Archive information**

**Level: 2**

**Credit value: 2**

### **Unit aims**

This unit is about deciding and agreeing the information to be archived and deleted within a business environment, including, working with external archive systems if this function is outsourced from an organisation

### **Learning outcomes**

There are **two** learning outcomes to this unit. The learner will:

1. Understand procedures for archiving information
2. Be able to archive information

### **Guided learning hours**

It is recommended that **13** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- information
- records

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205, BA219

## **BA220      Archive information**

Learning outcomes and assessment criteria

### **Outcome 1    Understand procedures for archiving information**

The learner can:

- 1    explain why and when required information should be archived
- 2    explain the purpose of agreeing retention periods for archiving information
- 3    describe procedures to be followed for archiving information, including legal requirements, if required
- 4    explain the purpose of organisational and legal requirements for the security and confidentiality of archived information
- 5    explain the purpose of deciding and agreeing information to be archived
- 6    describe procedures for recording and keeping archived information
- 7    explain how to retrieve archived information
- 8    describe how to delete information from an archive system
- 9    describe problems that may occur with systems containing archived information and how to deal with them or refer them
- 10   describe the purpose of conforming to requirements of an external archive system, if outsourced from the organisation

### **Outcome 2    Be able to archive information**

The learner can:

- 1    decide and agree the information to be archived, retrieved and deleted
- 2    decide and agree on the retention period for information being archived
- 3    follow legal and organisational policies and procedures for security and confidentiality of information
- 4    archive information to the agreed brief and timescale
- 5    maintain and update a record of information archived
- 6    resolve or refer problems, if required
- 7    retrieve archived information on request
- 8    delete archived information, if required
- 9    conform to requirements of external archive systems, if outsourced from the organisation

# BA221

## Use office equipment



## **BA221 Use office equipment**

**Level: 2**

**Credit value: 4**

### **Unit aims**

This unit is about using a variety of different office equipment following manufacturer's and organisational guidelines

### **Learning outcomes**

There are **seven** learning outcomes to this unit. The learner will:

1. Know about different types of office equipment and its uses
2. Understand the purpose of following instructions and health and safety procedures
3. Understand how to use equipment in a way that minimises waste
4. Know about the different types of problems that may occur when using equipment and how to deal with them
5. Understand the purpose of meeting work standards and deadlines
6. Understand the purpose of leaving equipment and the work area ready for the next user
7. Be able to use office equipment

### **Guided learning hours**

It is recommended that **18** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205

## **BA221 Use office equipment**

Learning outcomes and assessment criteria

### **Outcome 1 Know about different types of office equipment and its uses**

The learner can:

- 1 identify different types of equipment and their uses
- 2 describe the different features of different types of office equipment
- 3 explain why different types of equipment are chosen for tasks

### **Outcome 2 Understand the purpose of following instructions and health and safety procedures**

The learner can:

- 1 explain the purpose of following manufacturer's instructions when using equipment
- 2 explain the purpose of following organisational instructions when using equipment
- 3 identify health and safety procedures for using different types of equipment
- 4 explain the purpose of following health and safety procedures when using equipment
- 5 explain the purpose of keeping equipment clean and hygienic

### **Outcome 3 Understand how to use equipment in a way that minimises waste**

The learner can:

- 1 give examples of waste when using equipment
- 2 give examples of ways to reduce waste
- 3 explain the purpose of minimising waste

### **Outcome 4 Know about the different types of problems that may occur when using equipment and how to deal with them**

The learner can:

- 1 give examples of equipment problems
- 2 explain the purpose of following manufacturer's instructions and organisational procedures when dealing with problems
- 3 give examples of how to deal with problems

### **Outcome 5 Understand the purpose of meeting work standards and deadlines**

The learner can:

- 1 explain the purpose of meeting work standards and deadlines when using equipment

### **Outcome 6 Understand the purpose of leaving equipment and the work area ready for the next user**

The learner can:

- 1 explain the purpose of leaving equipment and the work area ready for the next user

### **Outcome 7 Be able to use office equipment**

The learner can:

- 1 locate and select equipment needed for a task
- 2 use equipment following manufacturer's and organisational guidelines
- 3 use equipment minimising waste
- 4 keep equipment clean and hygienic
- 5 deal with equipment problems following manufacturer's and organisational procedures
- 6 refer problems, if required
- 7 make sure final work product meets agreed requirements

- 8 make sure that product is delivered to agreed timescale
- 9 make sure equipment, resources and work area are ready for the next user



## **BA222**

Maintain and issue stationary stock items





## **BA222      Maintain and issue stationary stock items**

**Level: 2**

**Credit value: 3**

### **Unit aims**

This unit is about the procedures involved in keeping a stock of business items that will be used in a business environment in order to complete the day to day work of the organisation

### **Learning outcomes**

There are **eight** learning outcomes to this unit. The learner will:

1. Understand procedures for maintaining and issuing stationery stock items
2. Know how to handle, store and dispose of stationery stock items
3. Understand problems that may occur with maintaining and issuing stationery stock items and how to deal with them
4. Understand how to make recommendations for improving stationery stock handling
5. Be able to maintain stationery stock levels
6. Be able to issue items from stationery stock
7. Be able to deal with unwanted or damaged items of stationery stock
8. Be able to make recommendations to improve stationery stock handling

### **Guided learning hours**

It is recommended that **14** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- stock records
- purchase orders
- delivery notes
- appraisals

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205

## **BA222 Maintain and issue stationery stock items**

Learning outcomes and assessment criteria

### **Outcome 1 Understand procedures for maintaining and issuing stationery stock items**

The learner can:

- 1 outline organisational requirements for ordering, taking delivery, storing, stock-taking, issuing and disposing of stationery stock items
- 2 outline ways of keeping up-to-date, accurate and legible records of stationery stock items
- 3 explain the purpose of knowing the level of demand for stationery stock items and how this may affect requirements for ordering and stock held
- 4 outline other factors that may affect the future level of demand for stationery stock held
- 5 give examples of suppliers that may be used when ordering stationery stock items
- 6 outline differences between ordering stationery stock items from internal and external suppliers
- 7 outline organisational procedures for issuing stationery stock items
- 8 outline when it may be necessary to ask for receipts for stationery stock items issued

### **Outcome 2 Know how to handle, store and dispose of stationery stock items**

The learner can:

- 1 outline organisational procedures for handling and storing stationery stock items safely and securely
- 2 outline organisational procedures for the correct and safe disposal of stationery stock items

### **Outcome 3 Understand problems that may occur with maintaining and issuing stationery stock items and how to deal with them**

The learner can:

- 1 describe types of problems that may occur with deliveries and stationery stock items
- 2 describe organisational procedures for dealing with problems

### **Outcome 4 Understand how to make recommendations for improving stationery stock handling**

The learner can:

- 1 describe organisational procedures for recommending improvements for ordering, taking delivery, storing, stock-taking, issuing and disposing of unwanted or damaged stationery stock items

### **Outcome 5 Be able to maintain stationery stock levels**

The learner can:

- 1 maintain stationery stock items to required levels
- 2 handle and store stationery stock safely and securely, maintaining its condition and following organisational procedures
- 3 carry out stock-takes as instructed and report problems
- 4 order stationery stock from suppliers within limits of own authority
- 5 chase up orders with suppliers
- 6 check incoming deliveries against orders and report any problems
- 7 keep up-to-date, accurate and legible records of stationery stock delivered and held

## **Outcome 6 Be able to issue items from stationery stock**

The learner can:

- 1 issue stationery stock items as requested, following organisational procedures
- 2 keep up-to-date, accurate and legible records of stationery stock items issued

## **Outcome 7 Be able to deal with unwanted or damaged items of stationery stock**

The learner can:

- 1 dispose of unwanted or damaged stationery stock items safely, following organisational procedures and legal requirements

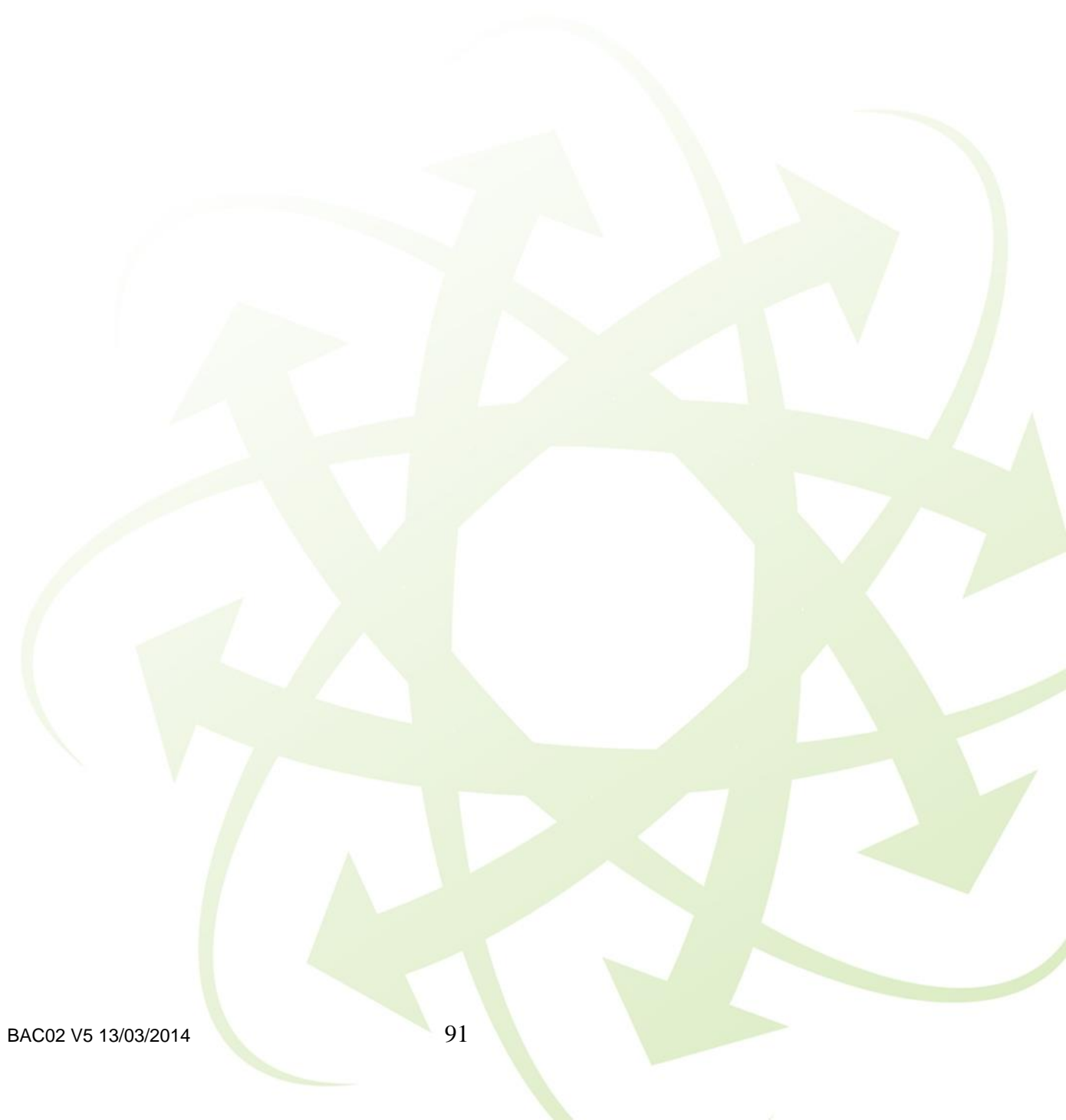
## **Outcome 8 Be able to make recommendations to improve stationery stock handling**

The learner can:

- 1 identify and recommend ways in which systems for receiving, issuing and disposing of stationery stock could be improved, as required

# BA223

## Support the organisation of an event



## **BA223 Support the organisation of an event**

**Level: 2**

**Credit value: 2**

### **Unit aims**

This unit is about supporting the organisation and delivery of an event

### **Learning outcomes**

There are **two** learning outcomes to this unit. The learner will:

1. Understand the role and purpose of providing support with the organisation of an event
2. Be able to support the organisation of an event

### **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 (if appropriate)**

BAA311 Support the organisation and co-ordination of an event

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for Business and Administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205

## **BA223 Support the organisation of an event**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the role and purpose of providing support with the organisation of an event**

The learner can:

- 1 describe the role and responsibilities required when supporting the organisation of an event
- 2 identify a range of support activities that may be required when supporting the organisation of an event
- 3 identify the purpose and value of giving assistance with organising an event
- 4 describe the different types of events and their main features
- 5 describe the types of risks associated with events and how to minimise these
- 6 outline the types of information that delegates will need
- 7 explain how to identify suitable venues for different types of events
- 8 describe the types of resources needed to prepare for different types of events
- 9 outline the different special requirements that delegates may have and how to meet these
- 10 describe the health, safety and security requirements that need to be considered when organising events

### **Outcome 2 Be able to support the organisation of an event**

The learner can:

1. contribute to the organisation of an event by:
  - a) supporting the implementation of the plan for the event to meet agreed objectives
  - b) identifying resources and support needed for organising an event
  - c) identifying and costing suitable venues
  - d) arranging resources and production of event materials
  - e) preparing and sending of invitations to delegates
  - f) co-ordinating delegate responses
  - g) liaising with the venue to confirm event requirements
  - h) providing delegates with joining instructions and event materials
  - i) rehearsing arrangements to make sure the event runs smoothly, if required
  - j) following all legal and contractual requirements
  - k) following the relevant health, safety and security requirements for the event

# BA224

Support the co-ordination of an event



## **BA224 Support the co-ordination of an event**

**Level: 2**

**Credit value: 3**

### **Unit aims**

This unit is about supporting the co-ordination and delivery of an event

### **Learning outcomes**

There are **two** learning outcomes to this unit. The learner will:

1. Understand the role and purpose of supporting the co-ordination of an event
2. Be able to support the co-ordination of an event

### **Guided learning hours**

It is recommended that **20** 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 (if appropriate)**

BAA311 Support the organisation and co-ordination of an event

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for Business and Administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- evaluation reports

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205



## **BA224 Support the organisation of an event**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the role and purpose of supporting the co-ordination of an event**

The learner can:

- 1 describe the range of support activities that may be required when supporting the co-ordination of an event
- 2 identify the responsibilities involved in supporting the co-ordination of an event
- 3 describe the types of problems that may occur during events and how to deal with these
- 4 describe the points to observe when clearing and vacating an event
- 5 describe the types of follow-up activities that may be required to carry out the co-ordination of an event

### **Outcome 2 Be able to support the co-ordination of an event**

The learner can:

- 1 contribute to the co-ordination of an event by:
  - a) preparing the venue and making sure all necessary resources and supporting activities are in place
  - b) arranging resources during an event, in line with agreed plans
  - c) helping delegates to feel welcome
  - d) meeting delegates' needs throughout an event
  - e) resolving or referring problems, as required
  - f) liaising with the management of the venue to make sure facility resources are in place
  - g) clearing, and vacating the venue according to the terms of the contract
  - h) preparing and circulating papers, or completing other follow up actions following the event, if required

## **BA225**

Support the organisation of business travel  
or accommodation



## **BA225 Support the organisation of business travel or accommodation**

**Level: 2**

**Credit value: 3**

### **Unit aims**

This unit is about supporting the delivery of business travel or accommodation arrangements following instruction from the organiser or traveller(s).

### **Learning outcomes**

There are **three** learning outcomes to this unit. The learner will:

1. Understand the purpose of confirming a brief and budget for business travel or accommodation
2. Know the sources of information and facilities available to make business travel or accommodation arrangements
3. Be able to support the organisation with business travel or accommodation arrangements

### **Guided learning hours**

It is recommended that **18** 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 (if appropriate)**

BAA321 Support the organisation of business travel or accommodation

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- briefs
- budgets
- records

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205

## **BA225 Support the organisation of business travel or accommodation**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the purpose of confirming a brief and budget for business travel or accommodation**

The learner can:

- 1 explain the purpose of obtaining and confirming instructions for arranging business travel or accommodation
- 2 explain the purpose and benefits of confirming the requirements of a brief and budget for business travel or accommodation arrangements
- 3 explain the purpose of following the requirements of a brief and budget for business travel or accommodation arrangements
- 4 describe how to support the organisation of business travel or accommodation to meet expectations
- 5 describe the main types of business travel or accommodation arrangements that may need to be made and the procedures to follow
- 6 describe how to obtain best value for money when making business travel or accommodation arrangements
- 7 describe how to keep records of business travel or accommodation arrangements
- 8 outline the documents and information to provide to the person who is travelling and how to obtain these
- 9 describe the types of problems that may occur with business travel or accommodation arrangements and the correct procedures to follow in order to deal with these problems

### **Outcome 2 Know the sources of information and facilities available to make business travel or accommodation arrangements**

The learner can:

- 1 describe sources of information, and the facilities available, for making business travel or accommodation arrangements

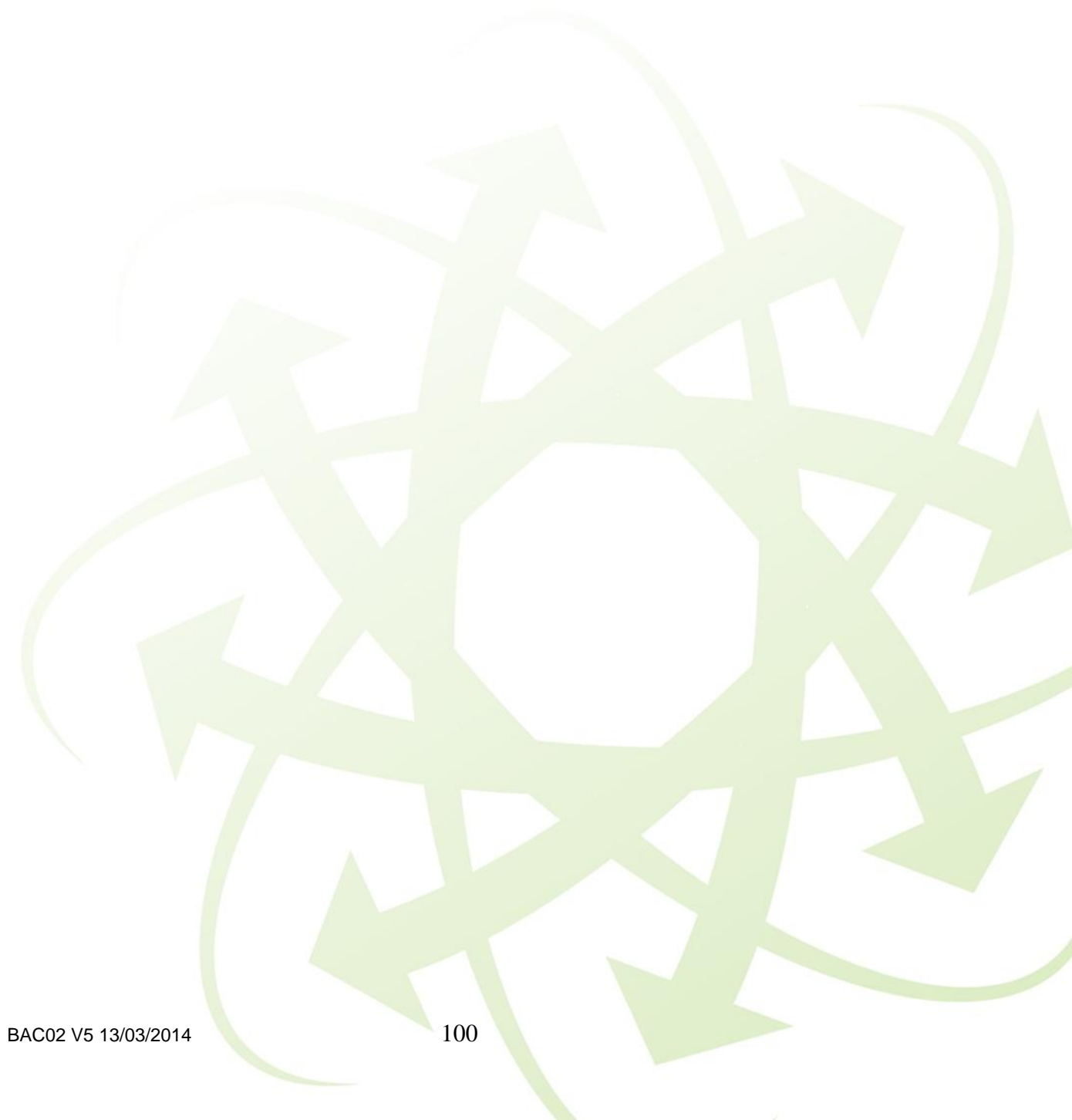
### **Outcome 3 Be able to support the organisation with business travel or accommodation arrangements**

The learner can:

- 1 confirm the brief and budget for business travel or accommodation arrangements
- 2 check a draft itinerary and schedule with organiser or traveller(s)
- 3 identify suitable business travel or accommodation options
- 4 book suitable business travel or accommodation arrangements, following instructions:
  - a) to meet the brief and budget using available sources of information and facilities
  - b) obtaining best value for money
  - c) making payment or agreeing payment arrangements
- 5 obtain confirmations, and collate documents for business travel or accommodation arrangements
- 6 maintain records of business travel or accommodation arranged
- 7 provide the organiser or traveller(s) with an itinerary and required documents in good time
- 8 confirm with the organiser or traveller(s) that itinerary and documents meet requirements
- 9 resolve or refer problems to the appropriate person

## **BA226**

### **Support the organisation of meetings**



## **BA226 Support the organisation of meetings**

**Level: 2**

**Credit value: 4**

### **Unit aims**

This unit is about supporting the planning and organisation of meetings.

### **Learning outcomes**

There are **three** learning outcomes to this unit. The learner will:

1. Understand the arrangements to be made to support the planning and organising of meetings
2. Be able to prepare for a meeting
3. Be able to follow up a meeting

### **Guided learning hours**

It is recommended that **18** 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 (if appropriate)**

BAA321 Support the organisation of business travel or accommodation

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- budgets
- event documentation

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205

## **BA226 Support the organisation of meetings**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the arrangements to be made to support the planning and organising of meetings**

The learner can:

- 1 describe the role and responsibilities for supporting the organiser of the meeting
- 2 describe different types of meetings and their main features
- 3 describe how to help plan meetings to meet agreed aims and objectives
- 4 describe the types of resources that may be needed for different types of meetings
- 5 describe health, safety and security arrangements to follow when organising meetings
- 6 explain the purpose of following the agreed brief, plan and the resources required, for arranging a meeting
- 7 identify the sources and types of information and services needed to arrange a meeting
- 8 describe how to help the meeting organiser during the meeting
- 9 describe the organisational procedures for clearing and vacating a meeting room

### **Outcome 2 Be able to prepare for a meeting**

The learner can:

- 1 confirm the purpose and venue of a meeting
- 2 confirm a budget for a meeting, if required
- 3 organise and confirm venue, equipment and catering requirement, if required requirements
- 4 invite attendees and confirm attendance
- 5 collate and dispatch papers for a meeting within agreed timescales
- 6 make sure attendees' needs are met
- 7 make sure equipment and layout of the rooms meets the meeting brief
- 8 keep records of arrangements made and services used
- 9 attend to any requirements during the meeting as directed by the meeting organiser

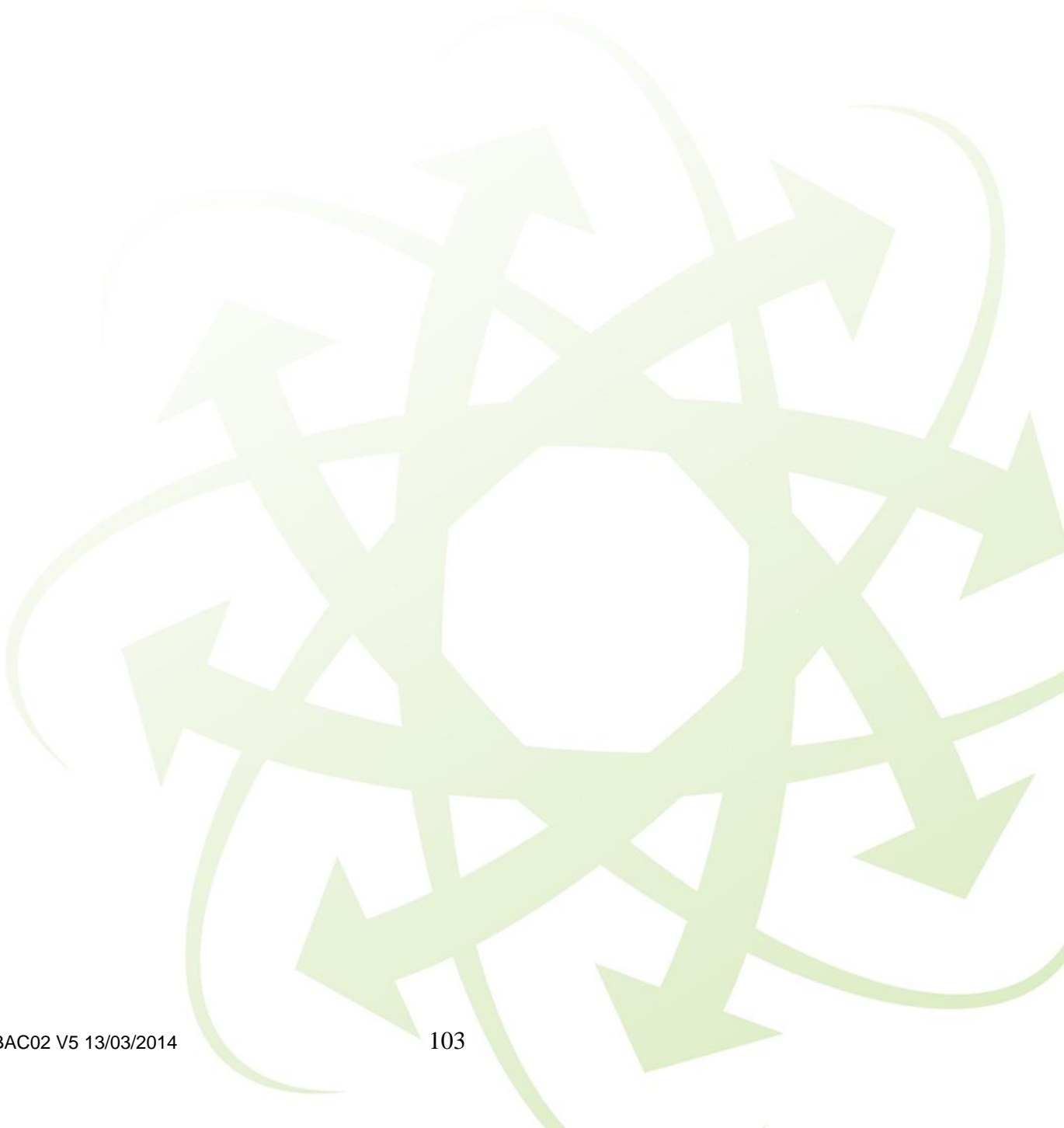
### **Outcome 3 Be able to follow up a meeting**

The learner can:

- 1 follow organisation procedures for clearing a meeting room
- 2 circulate a meeting record to agreed timescales
- 3 make sure arrangements for payments have been met, if required
- 4 contribute to the evaluation of arrangements made for meetings, as required

# **BA227**

## **Respond to change in a business environment**





## **BA227 Respond to change in a business environment**

**Level: 2**

**Credit value: 3**

### **Unit aims**

This unit is about recognising the effects of changes in workplace activities and the people who carry them out

### **Learning outcomes**

There are **five** learning outcomes to this unit. The learner will:

1. Understand the causes and effects of change in a business environment
2. Understand own role in supporting change
3. Understand own role in responding to change
4. Be able to respond to change
5. Be able to support the evaluation of change

### **Guided learning hours**

It is recommended that **16** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- Tasks completed
- feedback given by learner

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205

## **BA227 Respond to change in a business environment**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the causes and effects of change in a business environment**

The learner can:

- 1 give examples of changes in working practices in a business environment, and explain why they are happening
- 2 describe the possible effects of changes in working practices on people within a business environment
- 3 explain how change can benefit an organisation, team and individual

### **Outcome 2 Understand own role in supporting change**

The learner can:

- 1 describe ways in which individuals can support change in a business environment
- 2 explain the purpose and benefits of contributing to planning for change
- 3 explain how individuals can prepare for changes within a business environment and in ways of working
- 4 describe the types of support that people need during change
- 5 explain the benefits of good communication with others and accurate information during change
- 6 describe how to identify the effects of changes on own work and reasons for doing so
- 7 explain the purpose of reviewing the effects of changes on people, processes and outcomes
- 8 describe ways of reviewing the effects of changes on people, processes and outcomes

### **Outcome 3 Understand own role in responding to change**

The learner can:

- 1 explain the purpose of change as part of a process of continuous improvement
- 2 explain the possible effects of changes on own values
- 3 explain the benefits of responding positively to changes

### **Outcome 4 Be able to respond to change**

The learner can:

- 1 identify changes needed in own area of work
- 2 make suggestions for change
- 3 complete own work tasks using changed procedures or ways of working
- 4 identify where training or other support is needed
- 5 actively seek support, as required
- 6 give support to other people during change, or seek support, as required
- 7 ask questions to clarify issues

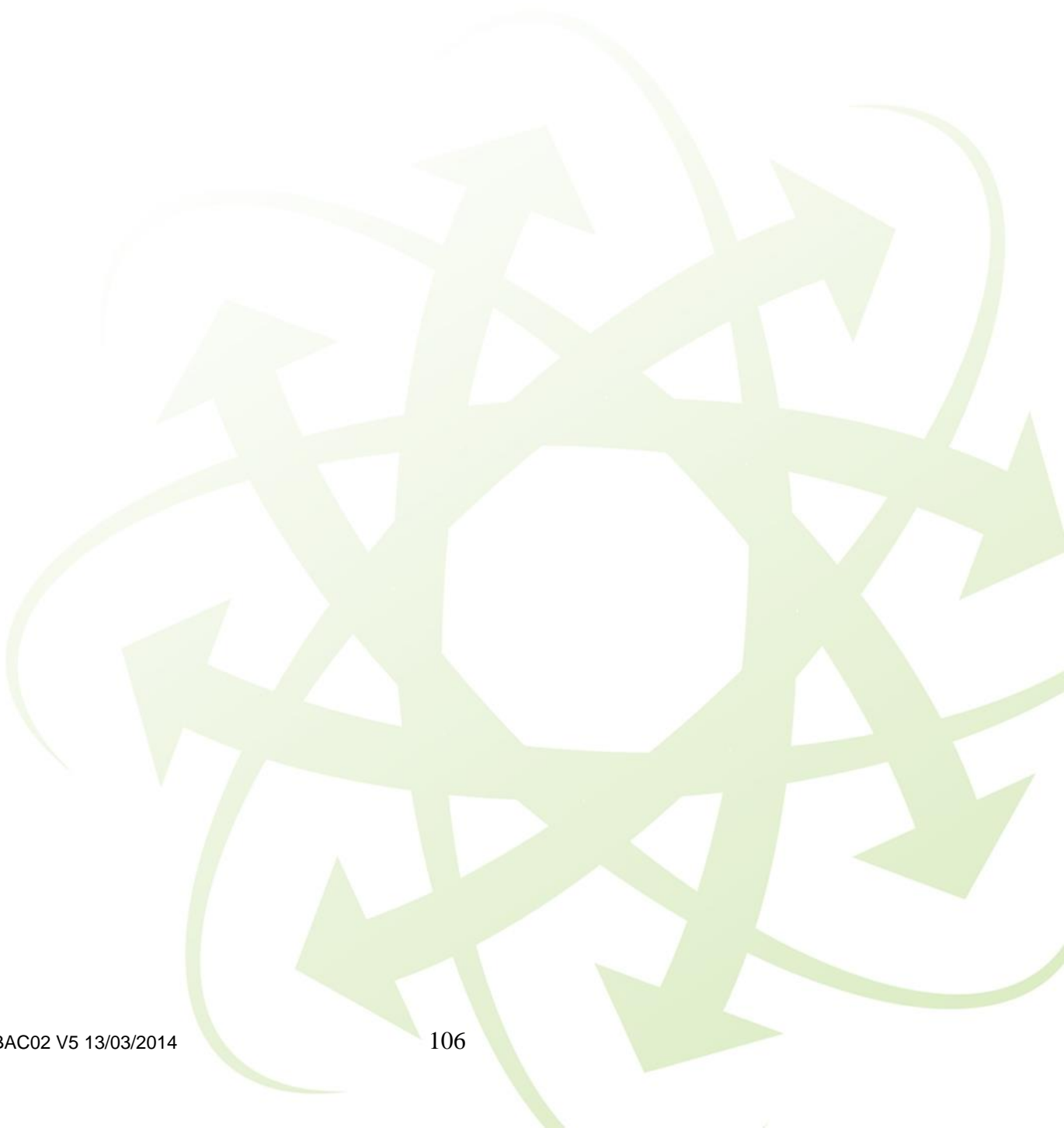
### **Outcome 5 Be able to support the evaluation of change**

The learner can:

- 1 give feedback on the effects of changes in own work
- 2 make suggestions for further actions, as required

## **BA228**

**Support the management and development  
of an information system**



## **BA228 Support the management and development of an information system**

**Level: 2**

**Credit value: 7**

### **Unit aims**

This unit is about supporting the management and evaluation of an information system to meet identified needs in a business environment

### **Learning outcomes**

There are **four** learning outcomes to this unit. The learner will:

1. Understand how to contribute to the management of an information system
2. Understand how to contribute to the review and further development of an information system
3. Be able to contribute to the management of an information system
4. Be able to contribute to the evaluation of an information system

### **Guided learning hours**

It is recommended that **40** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- training records
- diary
- letters
- emails
- memos
- feedback
- minutes of meetings

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205

## **BA228 Support the management and development of an information system**

Learning outcomes and assessment criteria

### **Outcome 1 Understand how to contribute to the management of an information system**

The learner can:

- 1 explain the purpose of managing information to meet requirements
- 2 explain the purpose and value of supporting training for users and giving or requesting on-going support
- 3 explain the purpose of complying with legal and organisation requirements when using an information system
- 4 explain the purpose of contributing to the monitoring of an information system in use
- 5 explain the purpose of contributing to the maintenance and updating of an information system
- 6 describe ways of contributing to the maintenance and updating of an information system
- 7 describe the types of problems that may occur with an information system and how to deal with them

### **Outcome 2 Understand how to contribute to the review and further development of an information system**

The learner can:

- 1 explain the purpose and value of contributing to the continuous improvement of an information system
- 2 explain how to identify problems in an information system and report them
- 3 describe ways of contributing to the resolution of problems in an information system

### **Outcome 3 Be able to contribute to the management of an information system**

The learner can:

- 1 contribute to training on the use of an information system
- 2 contribute to supporting users, if required
- 3 monitor own use of an information system
- 4 confirm legal and organisational requirements for handling information are followed
- 5 make sure a system is maintained and updated, within limits of own authority
- 6 identify and report problems when they occur
- 7 resolve problems within limits of own authority

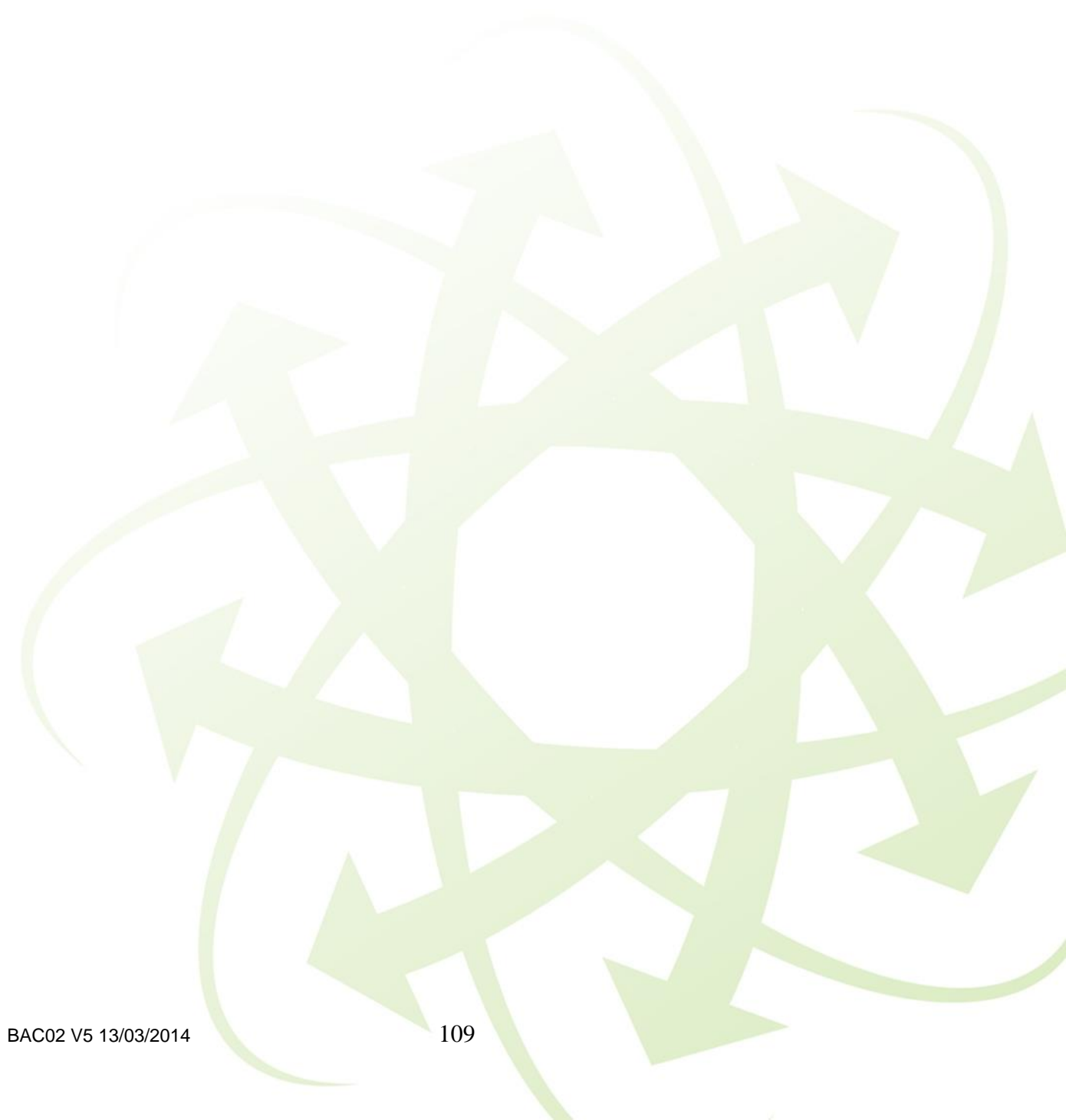
### **Outcome 4 Be able to contribute to the evaluation of an information system**

The learner can:

- 1 provide feedback on performance of an information system
- 2 contribute to the evaluation of feedback and prioritising of development needs, if required
- 3 contribute information to enable further system development

# BA256

## Meet and welcome visitors



## **BA256 Meet and welcome visitors**

**Level: 2**

**Credit value: 3**

### **Unit aims**

This unit covers the procedures to follow and hospitality to offer when meeting and welcoming visitors to business premises

### **Learning outcomes**

There are **two** learning outcomes to this unit. The learner will:

1. Understand procedures for meeting and welcoming visitors
2. Be able to meet and welcome visitors

### **Guided learning hours**

It is recommended that **23** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- visitors book

**Evidence generated for this unit of assessment may contribute towards other units including:** Units BA201, BA202, BA203, BA205, BA211

## **BA256 Meet and welcome visitors**

Learning outcomes and assessment criteria

### **Outcome 1 Understand procedures for meeting and welcoming visitors**

The learner can:

- 1 describe different reasons for people visiting a business, their requirements and how their needs may be met
- 2 explain the purpose of dealing with visitors promptly and courteously
- 3 explain the purpose of presenting a positive image of self and the organisation
- 4 explain the purpose of following health, safety and security procedures when dealing with visitors, including own responsibilities
- 5 describe different types of problems that may occur with visitors including, conflict and aggression
- 6 describe ways of dealing with different problems and when to refer them to an appropriate colleague
- 7 explain the purpose of communicating with visitors
- 8 describe organisation structures and communication channels within the organisation

### **Outcome 2 Be able to meet and welcome visitors**

The learner can:

- 1 greet visitor(s) and make them feel welcome
- 2 identify visitors and the reason for their visit
- 3 use the organisation's systems to receive and record visitors, as appropriate
- 4 make sure visitors' needs are met
- 5 present positive image of self and the organisation
- 6 follow health, safety and security procedures, as required
- 7 inform others of visitors' arrival, as required, in line with appropriate communication channels
- 8 deal with any problems that may occur, or refer problems to the appropriate person
- 9 follow procedures for departing visitors, as required



## **BA290**

### Administer human resources records



## **BA290      Administer human resources records**

**Level: 2**

**Credit value: 3**

### **Unit aims**

This unit covers the knowledge and understanding learners need to administer Human Resource records. It also covers the practical application of this knowledge and understanding

### **Learning outcomes**

There are **eight** learning outcomes to this unit. The learner will:

1. Understand how to create personnel files for new starters
2. Understand how to maintain Human Resource information
3. Understand how to report Human Resource information
4. Understand the organisational and legal requirements for administering Human Resource records
5. Be able to create personnel files for new starters
6. Be able to maintain Human Resource information
7. Be able to report Human Resource information
8. Be able to comply with organisational and legal requirements

### **Guided learning hours**

It is recommended that **20** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role

**Evidence generated for this unit of assessment may contribute towards other units including: BA201, BA202, BA203, BA203, BA204, BA205**

## **BA290 Administer human resources records**

Learning outcomes and assessment criteria

### **Outcome 1 Understand how to create personnel files for new starters**

The learner can:

- 1 describe the systems, procedures and software used by the organisation for administering human Resource records
- 2 describe the information that should be entered in a new personnel file

### **Outcome 2 Understand how to maintain Human Resource information**

The learner can:

- 1 explain how to enter and update Human Resource information in a personnel file
- 2 describe the Human Resource information that should be held for members of staff
- 3 explain the action that should be taken if Human Resource information is incomplete

### **Outcome 3 Understand how to report Human Resource information**

The learner can:

- 1 describe the types of Human Resource reports that may be requested
- 2 explain how to produce reports from individual or multiple Human Resource files

### **Outcome 4 Understand the organisational and legal requirements for administering Human Resource records**

The learner can:

- 1 describe the current legislation that applies when dealing with Human Resource records
- 2 clarify the limits and scope of responsibilities and authority in administering HR records
- 3 describe the data protection principles that apply to HR records
- 4 explain organisation procedures for confidentiality of HR records
- 5 explain organisation procedures for security of HR records
- 6 explain the purpose of confidentiality and security of HR information
- 7 describe the potential consequences of a breach of confidentiality or security
- 8 explain organisation policy and procedure for removal of out of date HR information
- 9 explain organisation policy and procedure for archiving HR information

### **Outcome 5 Be able to create personnel files for new starters**

The learner can:

- 1 open a new personnel file
- 2 record required information about employee
- 3 file relevant employee documents
- 4 process monitoring data, as appropriate
- 5 check that information is complete, requesting missing information where necessary

### **Outcome 6 Be able to maintain Human Resource information**

The learner can:

- 1 keep required personnel information up to date
- 2 maintain records of personnel information
- 3 process and file relevant correspondence and documentation

## **Outcome 7 Be able to report Human Resource information**

The learner can:

- 1 provide information from individual personnel files as requested
- 2 provide management information reports as requested

## **Outcome 8 Be able to comply with organisational and legal requirements**

The learner can:

- 1 comply with organisational and legal requirements for confidentiality, freedom of information, data protection and security of information
- 2 remove out of date information in line with organisational policy and procedures
- 3 archive relevant information in line with current legislation and organisational policy and procedures

## **BA291**

### **Administer the recruitment and selection process**



## **BA291      Administer the recruitment and selection process**

**Level: 2**

**Credit value: 4**

### **Unit aims**

This unit covers the knowledge and understanding learners need to administer the recruitment and selection process. It also covers the practical application of this knowledge and understanding

### **Learning outcomes**

There are **eight** learning outcomes to this unit. The learner will:

1. Understand how to advertise job vacancies
2. Understand how to respond to potential applicants
3. Understand how to administer the selection process
4. Understand how to administer the appointment process
5. Be able to advertise job vacancies
6. Be able to respond to potential applicants
7. Be able to administer the selection process
8. Be able to administer the appointment process

### **Guided learning hours**

It is recommended that **30** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role

**Evidence generated for this unit of assessment may contribute towards other units including: BA201, BA202, BA203, BA203, BA204, BA205**

## **BA291 Administer the recruitment and selection process**

Learning outcomes and assessment criteria

### **Outcome 1 Understand how to advertise job vacancies**

The learner can:

- 1 explain organisational policies, procedures and constraints that affect the area of responsibility
- 2 explain the procedures to identify and process personnel requirements in the organisation
- 3 explain ways in which personnel requirements are expressed in job descriptions and persons specifications
- 4 explain how to interpret personnel requirements in job descriptions and persons specifications
- 5 describe the current legislation, that applies when dealing with recruitment and selection
- 6 clarify the limits and scope of their responsibilities and authority in administering the recruitment and selection process
- 7 describe the types of information to include in a job advertisement
- 8 explain the legal/organisational requirements that affect the type of information in the job advertisement
- 9 explain how to place advertisements in different locations
- 10 explain how to liaise with recruitment agencies

### **Outcome 2 Understand how to respond to potential applicants**

The learner can:

- 1 describe the type of information that should be in an application pack
- 2 describe the types of queries that applicants may have
- 3 explain how to respond to the queries that applicants may have
- 4 explain how to keep records of responses received
- 5 clarify the purpose of keeping records of responses received

### **Outcome 3 Understand how to administer the selection process**

The learner can:

- 1 describe organisational procedures used to shortlist the applicants
- 2 describe the procedures and methods for contacting shortlisted candidates to invite them to participate in the selection process
- 3 explain how to process feedback for unsuccessful applicants
- 4 describe the different types of selection processes that may be used and how they work
- 5 clarify the selection processes used in the organisation and their role in those
- 6 explain the administrative support needed for different types of selection processes
- 7 explain the procedures for obtaining the resources needed for the selection process
- 8 describe the range of documentation that is used for selection by their organisation
- 9 clarify the purpose of giving candidates a favourable impression of the organisation
- 10 describe the range of records that must be kept following the selection process
- 11 explain the purpose of following organisational procedures for keeping records following the selection process

### **Outcome 4 Understand how to administer the appointment process**

The learner can:

- 1 describe the range of pre-employment checks
- 2 explain how to carry out pre-employment checks
- 3 explain how to format offer letters and employment contracts
- 4 explain the purpose of confidentiality and security of record keeping

## **Outcome 5 Be able to advertise job vacancies**

The learner can:

- 1 confirm the personnel requirements with the responsible person
- 2 confirm the information that will appear in the job advertisement
- 3 confirm how the vacancy will be advertised
- 4 advertise the vacancy as agreed
- 5 liaise with relevant agencies to confirm details of job vacancies 5.6 Liaise with the relevant agencies to make sure they understand the requirements of the organisation

## **Outcome 6 Be able to respond to potential applicants**

The learner can:

- 1 send out application packs or other information to potential applicants
- 2 respond appropriately to queries from potential applicants
- 3 maintain records of responses received

## **Outcome 7 Be able to administer the selection process**

The learner can:

- 1 collate applications and make available to those involved in the selection
- 2 invite shortlisted candidates to take part in the selection process
- 3 process feedback to unsuccessful applicants
- 4 keep records of responses from shortlisted candidates
- 5 provide appropriate support for the selection process
- 6 help to make sure candidates have a positive impression of the organisation
- 7 keep records of the outcomes of the selection process

## **Outcome 8 Be able to administer the appointment process**

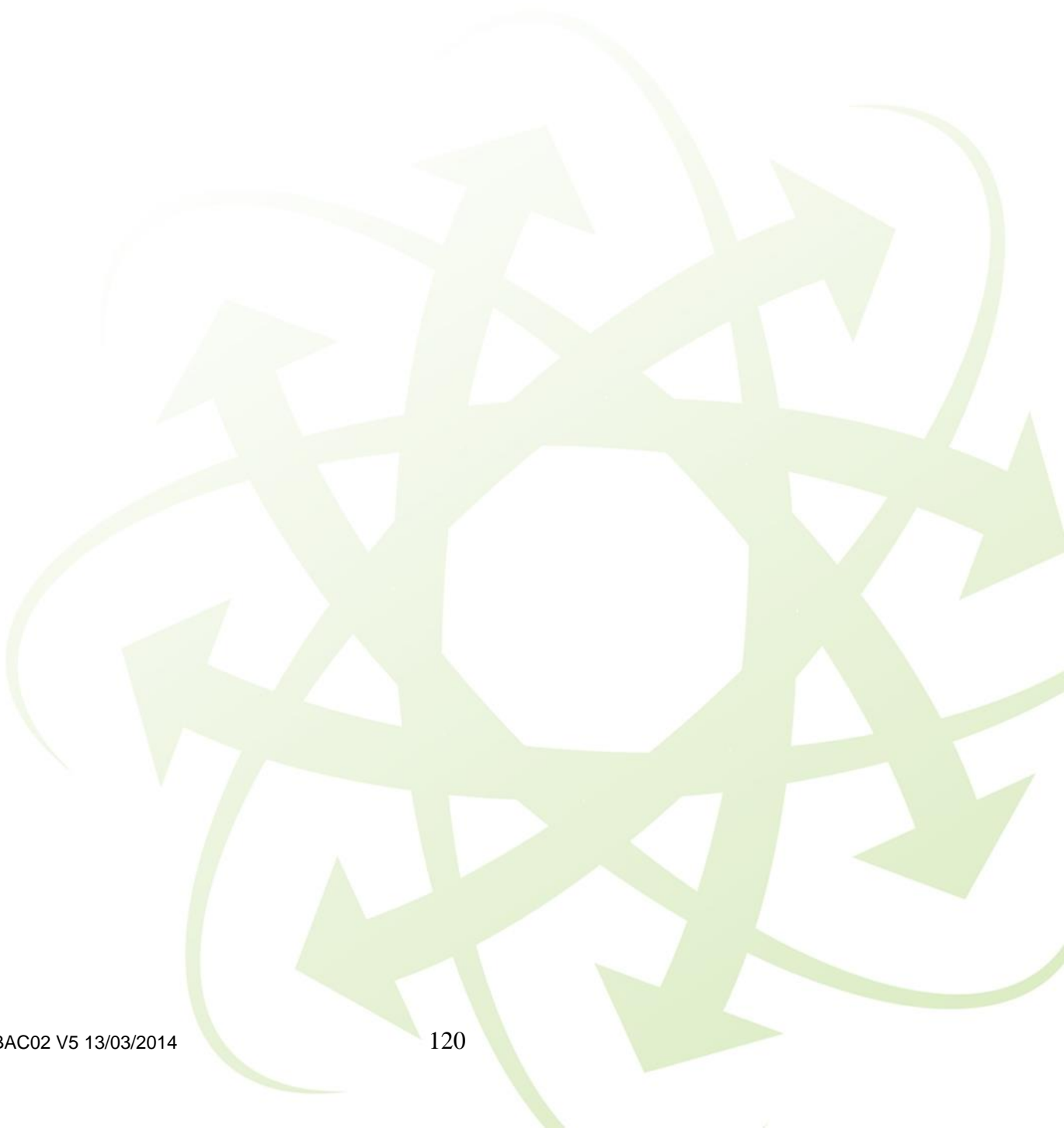
The learner can:

- 1 carry out appropriate pre-employment checks
- 2 format and send out offer letters and employment contracts
- 3 maintain records of the recruitment and selection process in line with current legislation and organisational requirements



## **BA292**

### **Administer parking dispensations**



## **BA292      Administer parking dispensations**

**Level: 2**

**Credit value: 4**

### **Unit aims**

This unit covers the knowledge and understanding learners need to administer dispensations. It also covers the practical application of this knowledge and understanding

### **Learning outcomes**

There are **four** learning outcomes to this unit. The learner will:

1. Understand the organisational and legal context for administering parking dispensations
2. Understand the processes involved in administering parking dispensations
3. Be able to receive and process applications for parking dispensations
4. Be able to issue documentation for parking dispensations

### **Guided learning hours**

It is recommended that **14** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role

**Evidence generated for this unit of assessment may contribute towards other units including: BA201, BA202, BA203, BA203, BA204, BA205**

## **BA292 Administer parking dispensations**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the organisational and legal context for administering parking dispensations**

The learner can:

- 1 describe the services that they are responsible for
- 2 clarify the limits and scope of their responsibilities and authority in providing services
- 3 explain the organisation's policies, procedures and constraints that affect services in their area of responsibility
- 4 explain how to apply the organisation's policies, procedures and constraints that affect services in their area of responsibility
- 5 describe the current legislation, Traffic Regulation Orders and other regulations that apply
- 6 the requirements of the Data Protection Act and its implications for own role
- 7 describe the specialist software used by the organisation for the issue of permits, season tickets, suspensions, dispensations / waivers and blue badges
- 8 explain how to use the specialist software used by the organisation for the issue of permits, season tickets, suspensions, dispensations / waivers and blue badges

### **Outcome 2 Understand the processes involved in administering parking dispensations**

The learner can:

- 1 explain the criteria, policy and procedures in relation to permits, season tickets, suspensions, dispensations / waivers and blue badges
- 2 clarify the range of checks that are relevant to applications
- 3 explain how and when to carry out the range of checks that are relevant to applications
- 4 clarify the organisation's anti-fraud policies and procedures
- 5 explain how to operate the organisation's anti-fraud policies and procedures
- 6 describe the evidence required to support an application for a permit, season tickets, suspension, dispensation / waiver or blue badge
- 7 explain the payment and refund processing within the organisation
- 8 explain how to communicate effectively with customers and other relevant departments
- 9 clarify the importance of the audit trail of controlled stationary
- 10 explain how to update and maintain records as necessary

### **Outcome 3 Be able to receive and process applications for parking dispensations**

The learner can:

- 1 advise customers on criteria for eligibility
- 2 review applications and supporting evidence against published criteria
- 3 seek additional evidence from the customer if required
- 4 carry out relevant checks in accordance with organisational procedures
- 5 where necessary, seek opinions from appropriate medical professionals
- 6 handle supporting documentation securely and in line with current legislation or relevant terms and conditions
- 7 make a decision to approve or decline the application

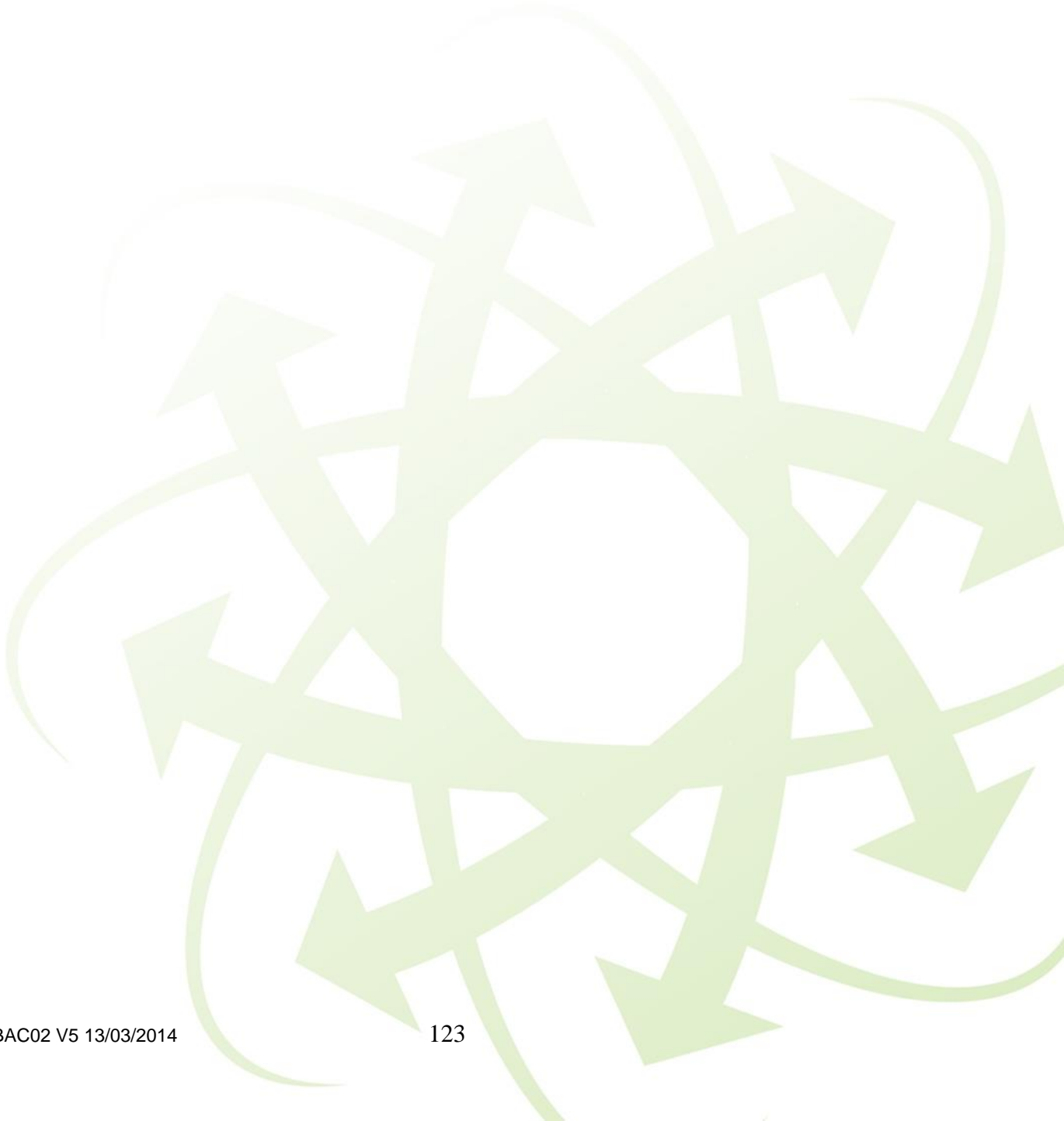
### **Outcome 4 Be able to issue documentation for parking dispensations**

The learner can:

- 1 communicate the decision to the customer, return documentation where necessary and issue appropriate paperwork
- 2 maintain appropriate records including renewals
- 3 process payments and handle refunds in line with organisational procedures
- 4 communicate the decision or information to other relevant departments

# **BA310**

Develop a presentation



## **BA310      Develop a presentation**

**Level: 3**

**Credit value: 3**

### **Unit aims**

This unit is about developing a presentation

### **Learning outcomes**

There are **two** learning outcomes to this unit. The learner will:

1. Understand the purpose of preparing for and evaluating a presentation
2. Be able to develop a presentation

### **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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- handouts
- feedback received
- plans

**Evidence generated for this unit of assessment may contribute towards other units including: Units BA301, BA302, BA303, BA305, BA309, BA311.**

## **BA310      Develop a presentation**

Learning outcomes and assessment criteria

### **Outcome 1    Understand the purpose of preparing for and evaluating a presentation**

The learner can:

- 1    explain the purpose of using different types of presentation and equipment to provide information
- 2    explain the procedures to be followed when preparing a presentation, including planning, preparation of content, materials, and contingencies
- 3    explain the benefits of preparing for giving a presentation
- 4    explain and illustrate how presentations may be enhanced by materials and equipment
- 5    explain the purpose and benefits of reflecting on the feedback obtained of the written present

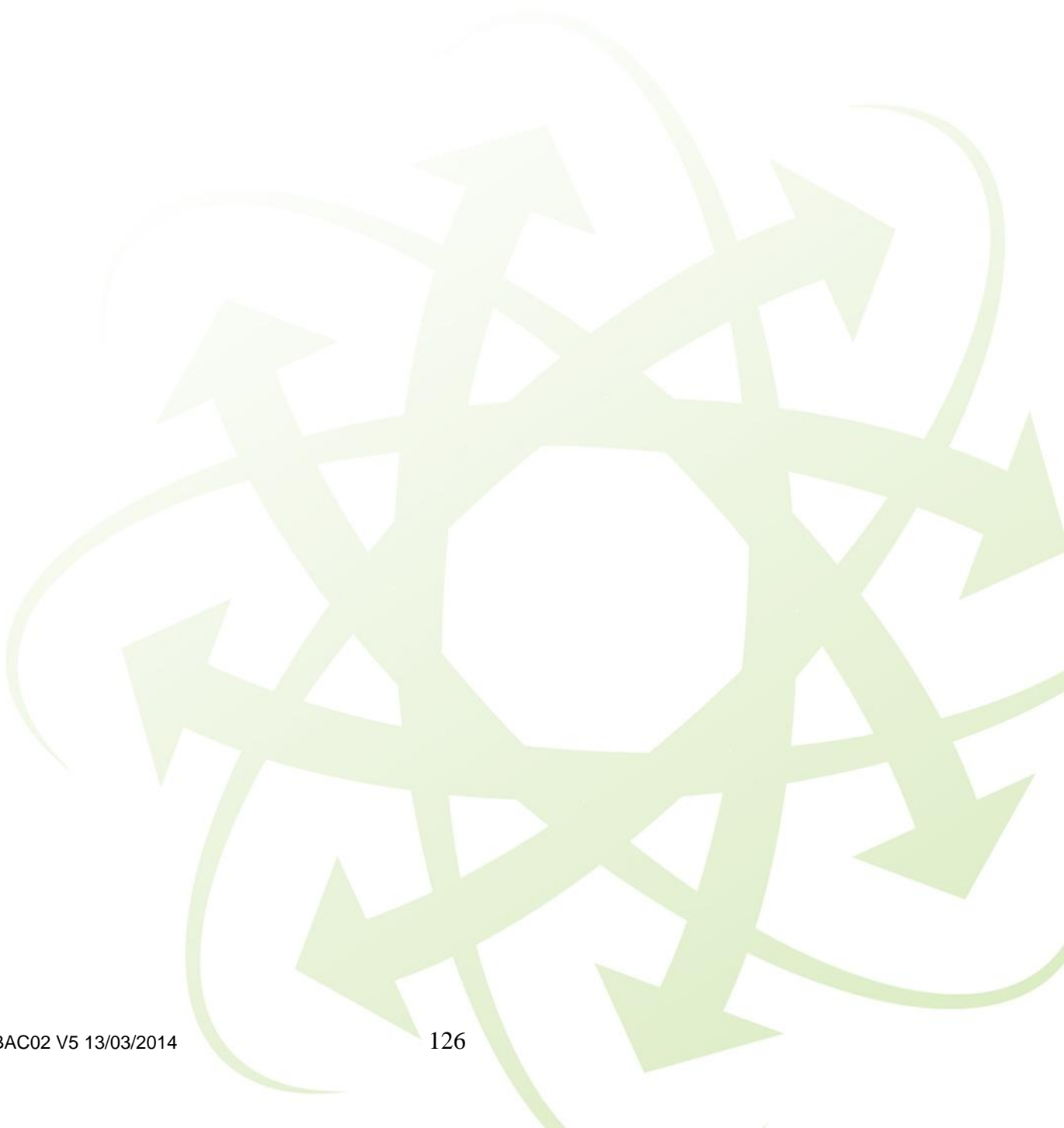
### **Outcome 2    Be able to develop a presentation**

The learner can:

- 1    agree and confirm audience, purpose, content, style and timing of a presentation
- 2    research and plan a presentation
- 3    select any equipment needed for the presentation
- 4    prepare content, shape and structure of a presentation to achieve its purpose and suit needs of audience
- 5    obtain feedback on planned presentation and make adjustments, if required
- 6    produce presentation handouts
- 7    collect feedback on the written presentation
- 8    reflect on the feedback obtained of the written presentation and identify learning points
- 9    identify changes that will improve future written presentations

# BA311

## Deliver a presentation



## **BA311 Deliver a presentation**

**Level: 3**

**Credit value: 3**

### **Unit aims**

This unit covers the skills, knowledge and understanding learners need to prepare for, deliver and evaluate a presentation for an audience.

### **Learning outcomes**

There are **five** learning outcomes to this unit. The learner will:

1. Understand the purpose of preparing for and evaluating a presentation
2. Understand the techniques used in enhancing a presentation
3. Be able to prepare for delivery of a presentation
4. Be able to deliver a presentation
5. Be able to evaluate a presentation

### **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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- presentation notes
- handouts
- slides
- letters
- emails
- memos
- presentation materials
- feedback
- evaluation sheets

**Evidence generated for this unit of assessment may contribute towards other units including: Units BA301, BA302, BA303, BA305, BA309, BA310**



## **BA311 Deliver a presentation**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the purpose of preparing for and evaluating a presentation**

The learner can:

- 1 explain the purpose of using different types of presentation and equipment
- 2 explain different ways of delivering presentations and their features
- 3 explain the procedures to be followed when preparing a presentation
- 4 explain the benefits of preparing for giving a presentation
- 5 describe the types of problems that may occur with equipment and how to deal with them
- 6 explain the purpose and benefits of contingency planning
- 7 explain the purpose and benefits of collecting feedback from the audience on the presentation
- 8 explain the purpose and benefits of evaluating presentations and own performance

### **Outcome 2 Understand the techniques used in enhancing a presentation**

The learner can:

- 1 explain and illustrate how presentations may be enhanced by materials and equipment
- 2 explain and illustrate how presentations may be enhanced by use of communication and interpersonal skills
- 3 describe how to gauge audience reaction to the presentation
- 4 explain the purpose and benefits of summarising important features of the presentation
- 5 describe the purpose and benefits of giving the audience opportunities to ask questions

### **Outcome 3 Be able to prepare for delivery of a presentation**

The learner can:

- 1 select any equipment needed and plan how to use it to best effect
- 2 make contingency plans in case of equipment failure or other problems, if required
- 3 practise the presentation and its timing
- 4 obtain feedback on planned presentation and make adjustments, if required

### **Outcome 4 Be able to deliver a presentation**

The learner can:

- 1 check equipment and resources
- 2 circulate presentation materials
- 3 introduce self to audience and state aims of the presentation
- 4 address the audience, speaking clearly and confidently, using language to suit the topic and audience
- 5 vary tone, pace and volume to emphasise key points
- 6 gauge audience reaction during the presentation and adapt if required
- 7 summarise throughout the presentation to emphasise key points and help to maintain audience interest
- 8 use body language in a way that reinforces presented information
- 9 use equipment, where appropriate, to enhance the presentation, and deal with any problems that may occur
- 10 provide the audience with opportunities to ask questions
- 11 listen carefully to questions and respond in a way that meets the audience's needs

## **Outcome 5 Be able to evaluate a presentation**

The learner can:

- 1 collect feedback on the presentation
- 2 reflect on own performance and identify learning points
- 3 evaluate the presentation and own performance and identify changes that will improve future presentations

# BA312

## Design and produce documents in a business environment



## **BA312 Design and produce documents in a business environment**

**Level: 3**

**Credit value: 4**

### **Unit aims**

This unit is about designing and preparing high quality and attractive documents to agreed layouts, formats and styles

### **Learning outcomes**

There are **four** learning outcomes to this unit. The learner will:

1. Understand the purpose and value of designing and producing high quality and attractive documents
2. Know the resources available to design and produce documents and how to use them
3. Understand the purpose and value of following procedures when designing and producing documents
4. Be able to design and produce documents to agreed specifications

### **Guided learning hours**

It is recommended that **25** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- documents produced

**Evidence generated for this unit of assessment may contribute towards other units including: Units BA301, BA302, BA303, BA305**

## **BA312 Design and produce documents in a business environment**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the purpose and value of designing and producing high quality and attractive documents**

The learner can:

- 1 describe different types of documents that may be designed and produced and the different styles that could be used
- 2 describe different formats in which text may be presented
- 3 explain the purpose and benefits of designing and producing high quality and attractive documents

### **Outcome 2 Know the resources available to design and produce documents and how to use them**

The learner can:

- 1 describe the types of resources needed to design and produce high quality and attractive documents
- 2 explain the purpose and benefits of using different types of resource to design and produce high quality and attractive documents
- 3 describe different types of technology available for inputting, formatting and editing text, and their main features

### **Outcome 3 Understand the purpose and value of following procedures when designing and producing documents**

The learner can:

- 1 explain the value and benefits of agreeing the purpose, content, style, and deadlines for the design and production of documents
- 2 describe ways of researching and organising content needed for documents
- 3 describe ways of integrating and laying out text and non-text
- 4 describe ways of checking finished documents for accuracy - including spelling, grammar and punctuation - and correctness, and the purpose of doing so
- 5 explain the purpose of storing documents safely and securely, and ways of doing so
- 6 explain the purpose of confidentiality and data protection when preparing documents
- 7 explain the purpose and benefits of meeting deadlines

### **Outcome 4 Be able to design and produce documents to agreed specifications**

The learner can:

- 1 agree the purpose, content, style and deadlines for documents
- 2 identify and prepare resources needed to design and produce documents
- 3 research and organise the content required for documents
- 4 make appropriate and efficient use of technology, as required
- 5 design, format and produce documents to an agreed style
- 6 integrate non-text objects into an agreed layout, if required
- 7 check texts and objects for accuracy
- 8 edit and correct texts and objects as required
- 9 clarify document requirements, if necessary
- 10 store documents safely and securely following organisational procedures
- 11 present documents to the required format, and within the agreed deadlines

## **BA313**

Prepare text from notes using touch typing  
(60 wpm)



## **BA313 Prepare text from notes using touch typing (60 wpm)**

**Level: 3**

**Credit value: 4**

### **Unit aims**

This unit is about preparing different types of text using touch typing at a minimum speed of 60 words per minute

### **Learning outcomes**

There are **four** learning outcomes to this unit. The learner will:

1. Understand the task of preparing text from notes using touch typing
2. Understand the purpose and benefits of following procedures when preparing text using touch typing
3. Be able to prepare for tasks
4. Be able to produce texts using touch typing at a minimum speed of 60 wpm

### **Guided learning hours**

It is recommended that **10** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos

**Evidence generated for this unit of assessment may contribute towards other units including: Units BA301, BA302, BA303, BA305**

## **BA313 Prepare text from notes using touch typing (60 wpm)**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the task of preparing text from notes using touch typing**

The learner can:

- 1 describe different types of documents that may be produced from notes and the format to be followed
- 2 describe different forms in which texts may be presented
- 3 explain the difference between producing text from own notes and producing text from others' notes

### **Outcome 2 Understand the purpose and benefits of following procedures when preparing text using touch typing**

The learner can:

- 1 explain the value and benefits of agreeing the purpose, format and deadline for texts
- 2 explain the benefits of accuracy – including spelling, grammar and punctuation – when preparing typed text from notes
- 3 describe ways of checking finished documents for accuracy and correctness, and the purpose of doing so
- 4 explain the purpose of storing text and original notes safely and securely, and ways of doing so
- 5 explain the purpose of confidentiality and data protection when preparing text from notes
- 6 explain the purpose and benefits of meeting deadlines

### **Outcome 3 Be able to prepare for tasks**

The learner can:

- 1 agree the purpose, format and deadlines for texts

### **Outcome 4 Be able to produce texts using touch typing at a minimum speed of 60 wpm**

The learner can:

- 1 input texts using touch typing to a minimum speed of 60 words per minute
- 2 format texts to agreed format making best use of available technology
- 3 clarify text requirements when necessary
- 4 read and check texts for accuracy
- 5 edit and correct texts, as required
- 6 store texts and original notes safely and securely following organisational procedures
- 7 present texts to the required format and within the agreed deadlines



## **BA314**

Prepare text from shorthand (80wpm)

## **BA314 Prepare text from shorthand (80wpm)**

**Level: 3**

**Credit value: 8**

### **Unit aims**

This unit is about preparing different types of text from shorthand notes at minimum speed of 80 words per minute

### **Learning outcomes**

There are **four** learning outcomes to this unit. The learner will:

1. Understand the task of preparing text from shorthand
2. Understand the purpose and value of following procedures when preparing text from shorthand
3. Be able to prepare for tasks, and use shorthand to take dictation
4. Be able to produce texts from shorthand

### **Guided learning hours**

It is recommended that **45** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- documents produced
- Shorthand notes
- letters
- emails
- memos

**Evidence generated for this unit of assessment may contribute towards other units including: Units BA301, BA302, BA303, BA305**

## **BA314 Prepare text from shorthand (80wpm)**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the task of preparing text from shorthand**

The learner can:

- 1 describe different types of documents that may be produced from shorthand and the formats to be followed
- 2 describe different forms in which shorthand texts may be presented

### **Outcome 2 Understand the purpose and value of following procedures when preparing text from shorthand**

The learner can:

- 1 explain the value and benefits of agreeing the purpose, format and deadline for preparing texts from shorthand
- 2 describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so
- 3 explain the purpose of storing texts and original shorthand notes safely and securely, and ways of doing so
- 4 explain the purpose of confidentiality and data protection when preparing texts from shorthand notes
- 5 explain the purpose and benefits of meeting deadlines

### **Outcome 3 Be able to prepare for tasks, and use shorthand to take dictation**

The learner can:

- 1 agree the purpose, format, and deadlines for texts
- 2 take dictation using shorthand at a minimum speed of 80 words per minute

### **Outcome 4 Be able to produce texts from shorthand**

The learner can:

- 1 get clarification of points as required
- 2 input and format texts to an agreed format from shorthand notes
- 3 make efficient use of technology, as required
- 4 read and check texts for accuracy
- 5 edit and correct texts, as required
- 6 store texts and original shorthand notes safely and securely following organisational procedures
- 7 present texts to the required format, within the agreed deadlines

## **BA315**

**Prepare text from recorded audio instruction  
(60wpm)**

## **BA315 Prepare text from recorded audio instruction (60wpm)**

**Level: 3**

**Credit value: 4**

### **Unit aims**

This unit is about preparing different types of text from audio recordings, where the recording is made at a minimum speed of 60 words per minute.

### **Learning outcomes**

There are **three** learning outcomes to this unit. The learner will:

1. Understand the task of preparing text from recorded audio instruction
2. Understand the purpose and value of following procedures when preparing text from recorded audio instruction
3. Be able to produce texts from audio recordings

### **Guided learning hours**

It is recommended that **25** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for Business and Administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- documents produced

**Evidence generated for this unit of assessment may contribute towards other units including: Units Q301, Q302, Q303, Q305**

## **BA315 Prepare text from recorded audio instruction (60wpm)**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the task of preparing text from recorded audio instruction**

The learner can:

- 1 describe different types of documents that may be produced from recorded audio and the formats to be followed
- 2 describe different forms in which texts may be presented
- 3 describe the different types of technology that are available for playing back recordings and their main features

### **Outcome 2 Understand the purpose and value of following procedures when preparing text from recorded audio instruction**

The learner can:

- 1 explain the value and benefits of agreeing the purpose, format and deadline for preparing texts from recorded audio instruction
- 2 describe ways of checking finished documents for accuracy - including spelling, grammar and punctuation - and correctness, and the purpose of doing so
- 3 explain the purpose of storing texts and original recordings safely and securely, and ways of doing so
- 4 explain the purpose of confidentiality and data protection when preparing texts from recorded audio
- 5 explain the purpose and benefits of meeting deadlines

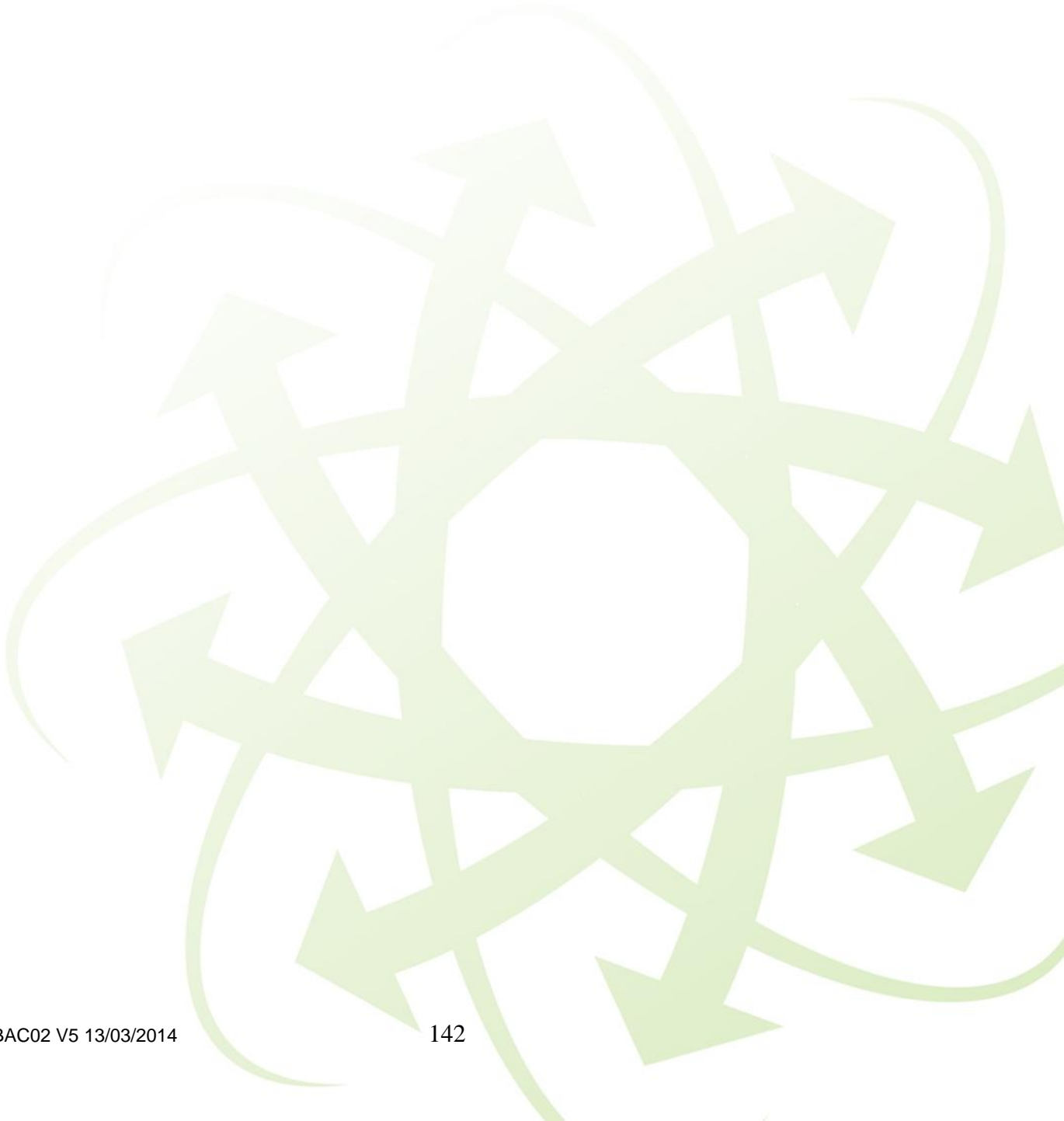
### **Outcome 3 Be able to produce texts from audio recordings**

**The learner can:**

- 1 agree the purpose, format, and deadlines for texts
- 2 input text from audio recordings at a minimum speed of 40 words per minute
- 3 format texts to agreed format making efficient use of available technology
- 4 clarify text requirements when necessary
- 5 read and check texts for accuracy
- 6 edit and correct texts, as required
- 7 store texts and original recordings safely and securely following organisational procedures
- 8 present texts to the required format and within the agreed deadlines

# BA316

Support the design and development of an information system



## **BA316 Support the design and development of an information system**

**Level: 3**

**Credit value: 7**

### **Unit aims**

This unit is about contributing to the design and development of an information system that will meet identified needs in a business environment

### **Learning outcomes**

There are **three** learning outcomes to this unit. The learner will:

1. Understand the purpose of supporting the design and development of an information system
2. Understand how to contribute to the design and development of an information system
3. Be able to contribute to the design and development of an information system

### **Guided learning hours**

It is recommended that **35** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- reports
- notes of meetings
- specification

**Evidence generated for this unit of assessment may contribute towards other units including: Units BA301, BA302, BA303, BA304, BA305, BA317**



## **BA316 Support the design and development of an information system**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the purpose of supporting the design and development of an information system**

The learner can:

- 1 explain the purpose and value of contributing to the design and development of an information system
- 2 describe ways of contributing to the design and development of an information system

### **Outcome 2 Understand how to contribute to the design and development of an information system**

The learner can:

- 1 explain the purpose and value of contributing own user needs for an information system
- 2 explain the benefits of developing a system specification based on user needs
- 3 describe ways of contributing to the creation, design and development of an information system
- 4 explain the purpose and value of contributing to the testing of an information system during design and development

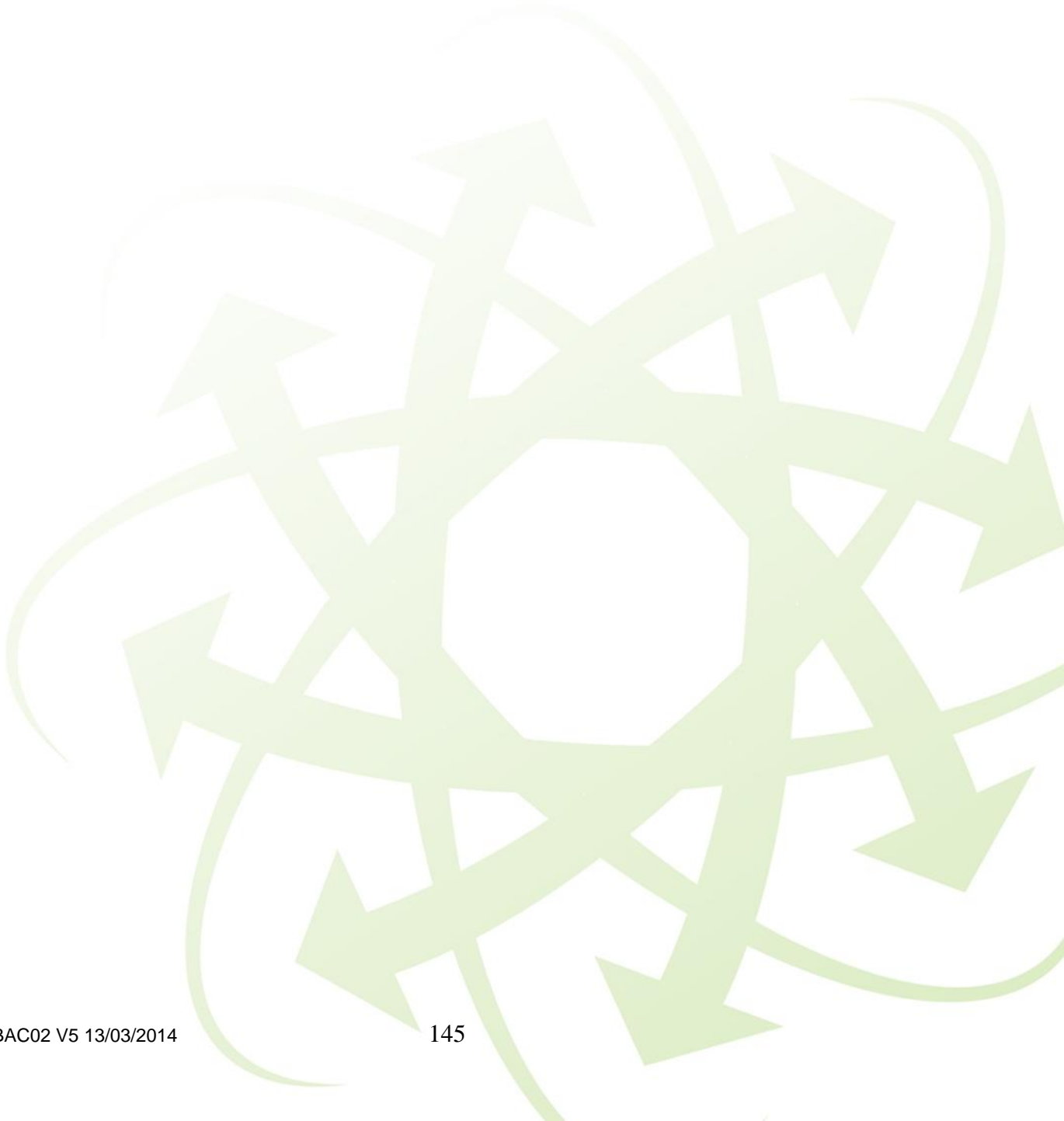
### **Outcome 3 Be able to contribute to the design and development of an information system**

The learner can:

- 1 identify and agree the information to be managed
- 2 contribute to the design and development of an information system to meet agreed specification requirements
- 3 support system testing
- 4 identify and report faults
- 5 remedy faults, within limits of own authority

# BA317

## Monitor information systems



## **BA317 Monitor information systems**

**Level: 3**

**Credit value: 7**

### **Unit aims**

This unit is about monitoring and evaluating an information system to meet identified needs in a business environment

### **Learning outcomes**

There are **three** learning outcomes to this unit. The learner will:

1. Understand how to monitor an information system
2. Understand how to review and further develop an information system
3. Be able to monitor an information system

### **Guided learning hours**

It is recommended that **30** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- feedback
- notes of meetings
- training records

**Evidence generated for this unit of assessment may contribute towards other units including: Units BA301, BA302, BA303, BA304, BA305**

## **BA317 Monitor information systems**

Learning outcomes and assessment criteria

### **Outcome 1 Understand how to monitor an information system**

The learner can:

- 1 explain the purpose and benefits of managing information to meet requirements
- 2 explain the purpose and benefits of providing training and on-going support to users
- 3 explain the purpose of complying with legal and organisational requirements when using an information system
- 4 explain the purpose and benefits of monitoring use of an information system
- 5 describe ways of monitoring use of an information system
- 6 explain the purpose and benefits of maintaining and updating an information system
- 7 describe ways of maintaining and updating an information system
- 8 describe the types of problems that may occur with an information system and how to deal with them

### **Outcome 2 Understand how to review and further develop an information system**

The learner can:

- 1 explain the purpose and benefits of continuously improving an information system
- 2 explain how to identify problems in an information system and analyse them
- 3 describe ways of resolving problems in an information system

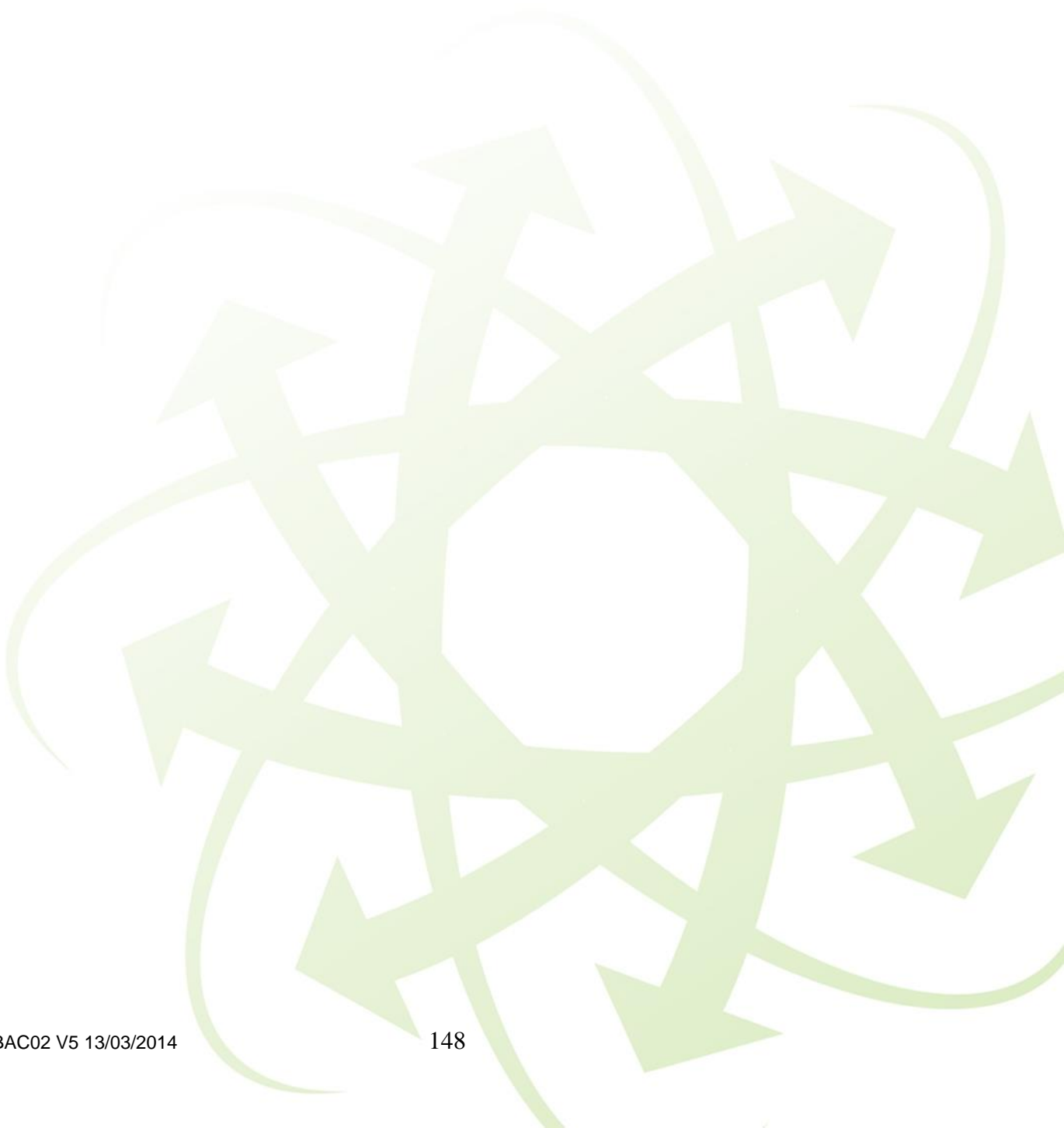
### **Outcome 3 Be able to monitor an information system**

The learner can:

- 1 identify the information to be monitored and the resources available to do so
- 2 contribute to designing a system specification
- 3 provide training on the use of an information system
- 4 provide on-going support to users
- 5 monitor use of an information system
- 6 make sure legal and organisational requirements for handling information are followed
- 7 make sure a system is maintained and updated, if required
- 8 Identify, analyse and resolve problems when they occur
- 9 collect feedback on performance of an information system
- 10 provide information to enable further system development to meet agreed specifications

# BA318

## Analyse and report data



## **BA318 Analyse and report data**

**Level: 3**

**Credit value: 6**

### **Unit aims**

This unit is about analysing and reporting data that meets the aims and objectives of the research

### **Learning outcomes**

There are **four** learning outcomes to this unit. The learner will:

1. Understand how to organise and evaluate data that has been researched
2. Understand how to report data that has been researched
3. Be able to analyse and evaluate data
4. Be able to report data

### **Guided learning hours**

It is recommended that **30** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- data reported
- feedback obtained

**Evidence generated for this unit of assessment may contribute towards other units including: Units BA301, BA302, BA303, BA304, BA305**

## **BA318 Analyse and report data**

Learning outcomes and assessment criteria

### **Outcome 1 Understand how to organise and evaluate data that has been researched**

The learner can:

- 1 describe purpose and benefits of organising data so that it can be analysed
- 2 explain how to evaluate the relevance, validity and reliability of data
- 3 explain how to analyse and prepare researched data so results will be accurate and free from bias
- 4 explain the differences between primary and secondary research methods
- 5 explain the differences between quantitative and qualitative research methods
- 6 describe how to search for relevant data sources

### **Outcome 2 Understand how to report data that has been researched**

The learner can:

- 1 describe ways of reporting data so that it
  - a) meets agreed aims and objectives
  - b) is accurate and free from bias

### **Outcome 3 Be able to analyse and evaluate data**

The learner can:

- 1 organise data so that it can be analysed and reported
- 2 select relevant, valid and reliable data to analyse
- 3 apply analysis and evaluation techniques, as required
- 4 review data to produce accurate, unbiased results and conclusions
- 5 check the accuracy of the analysis, and make adjustments, if required
- 6 obtain feedback on data analysis, if required

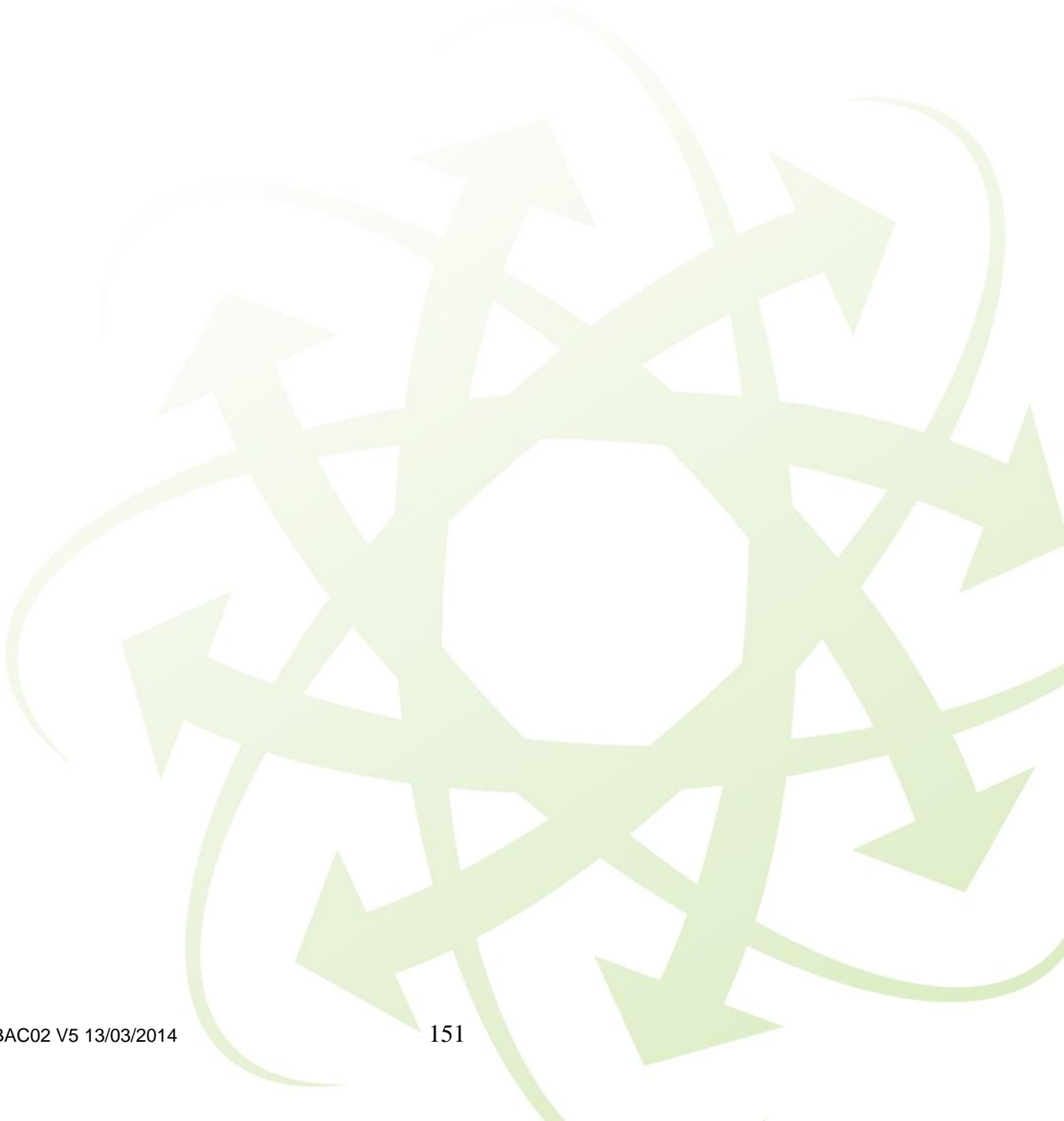
### **Outcome 4 Be able to report data**

The learner can:

- 1 present data in agreed format
- 2 present data to agreed timescale

# **BA319**

## Order products and services





## **BA319      Order products and services**

**Level: 3**

**Credit value: 5**

### **Unit aims**

This unit is about the ordering and supply of products and services for an organisation, ensuring that the products and services supplied meet the needs of the organisation and represent the best value for money

### **Learning outcomes**

There are **six** learning outcomes to this unit. The learner will:

1. Understand how to identify, select and negotiate the supply of products and services
2. Understand organisational requirements and policies for the ordering and supply of products and services
3. Understand how to monitor, evaluate and improve procedures for the ordering and supply of products and services
4. Be able to follow organisational procedures for the ordering and supply of products and services
5. Be able to maintain relationships with suppliers of products and services and deal with problems
6. Be able to monitor, evaluate and make recommendations to improve the ordering and supply of products and services

### **Guided learning hours**

It is recommended that **35** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- appraisals
- performance review
- records of monitoring
- contract
- orders
- delivery notes
- budgets
- information used

**Evidence generated for this unit of assessment may contribute towards other units including: Units BA301, BA302, BA303, BA305, BA306**

## **BA319 Order products and services**

Learning outcomes and assessment criteria

### **Outcome 1 Understand how to identify, select and negotiate the supply of products and services**

The learner can:

- 1 identify different sources of information on products and services for an organisation
- 2 explain how to use different sources of information on products and services
- 3 describe how to write a specification for a product or service
- 4 Identify sources of products and services that meet the quality expectations of an organisation
- 5 explain the purpose of selecting products and services that represent best value for money
- 6 describe how to negotiate best value for money
- 7 explain the purpose of developing and maintaining good relationships with suppliers, and ways of doing so
- 8 describe a supply chain and how it works

### **Outcome 2 Understand organisational requirements and policies for the ordering and supply of products and services**

The learner can:

- 1 describe the procedures for the ordering and supply of products and services for an organisation
- 2 describe the needs and priorities for the ordering and supply of products and services for an organisation
- 3 explain the purpose of having organisational policies for the acceptance of gifts and hospitality

### **Outcome 3 Understand how to monitor, evaluate and improve procedures for the ordering and supply of products and services**

The learner can:

- 1 explain the purpose of monitoring and evaluating procedures for the ordering and supply of products and services, and ways of doing so
- 2 describe actions that may be taken to improve efficiency in the ordering and supply of products and services
- 3 describe ways of getting better value for money for products and services provided

### **Outcome 4 Be able to follow organisational procedures for the ordering and supply of products and services**

The learner can:

- 1 use available information to keep up to date with products and services in own area of work
- 2 agree a budget and specification for products or services to be ordered
- 3 identify sources of products and services that meet the quality specification(s) of the organisation
- 4 select the product or service which represents best value for money
- 5 procure product(s) or service(s) following organisational procedures
- 6 negotiate with selected supplier(s) to reach an agreement which offers good value for money and which is acceptable to both parties, within limits of own authority
- 7 agree a contact for the supply of product(s) or service(s), within limits of own authority

**Outcome 5 Be able to maintain relationships with suppliers of products and services and deal with problems**

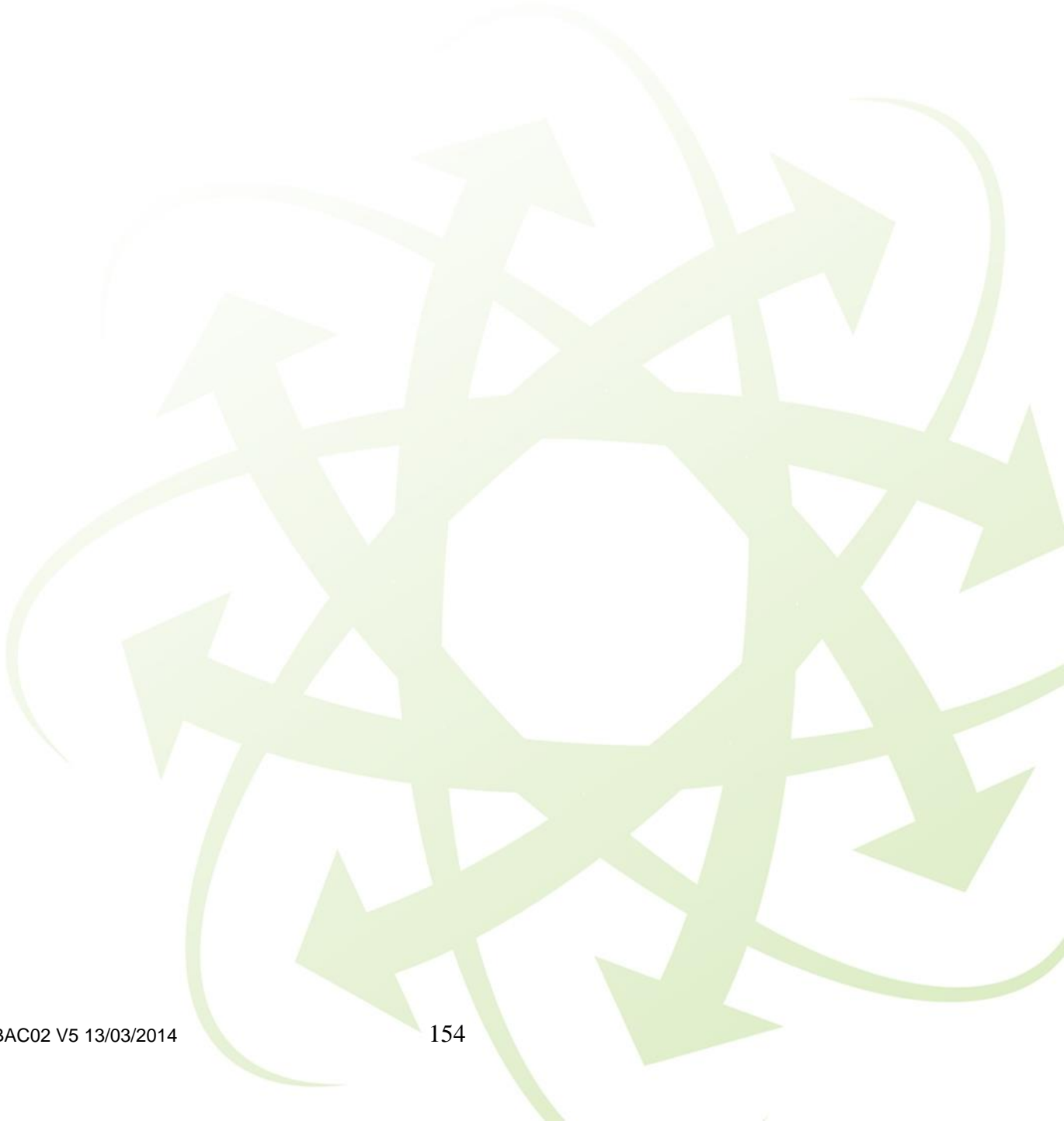
The learner can:

- 1 take actions to create and maintain partnerships with suppliers to improve quality and cut costs, within limits of own authority
- 2 monitor the performance of suppliers in line with the terms of the contract
- 3 deal with problems as they occur, seeking support from others, where necessary

**Outcome 6 Be able to monitor, evaluate and make recommendations to improve the ordering and supply of products and services**

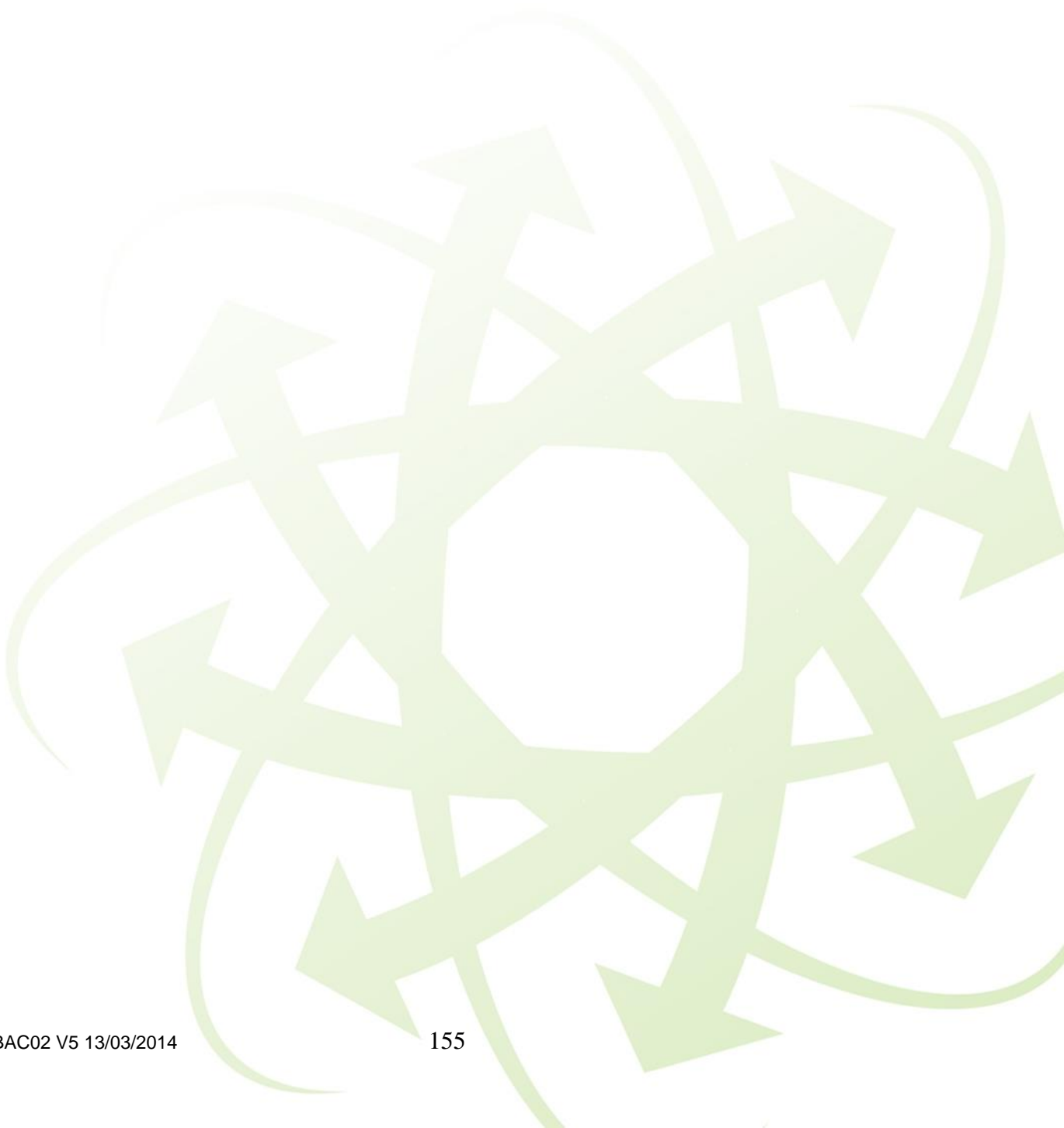
The learner can:

- 1 monitor the ordering and supply of products and services for effectiveness and efficiency
- 2 evaluate the ordering and supply of products and services and identify areas for improvement
- 3 suggest ways to improve effectiveness and efficiency and obtain better value for money for the supply of products and services



# **BA320**

## **Plan and organise an event**



## **BA320 Plan and organise an event**

**Level: 3**

**Credit value: 4**

### **Unit aims**

This unit is about following occupational health and safety guidelines when using keyboards and workstation care and maintenance.

### **Learning outcomes**

There are **four** learning outcomes to this unit. The learner will:

1. Understand the role of an event organiser in planning an event
2. Understand the arrangements to be made when planning and organising an event
3. Understand the different types of venues and resources needed for different types of events
4. Be able to plan and organise an event

### **Guided learning hours**

It is recommended that **28** 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 (if appropriate)**

This unit is linked to the National Occupational Standards for Business and Administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for Business and Administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- briefs
- budgets
- plans
- event packs
- training schedules

**Evidence generated for this unit of assessment may contribute towards other units including: Units BA301, BA302, BA303, BA305**

## **BA320 Plan and organise an event**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the role of an event organiser in planning an event**

The learner can:

- 1 explain the purpose and benefits of planning an event
- 2 explain the role of the event organiser in:
  - a) meeting the objectives of the event
  - b) agreeing a brief and budget for the event
- 3 identify and evaluate the types of risks associated with events and explain how to minimise these
- 4 explain the purpose and benefits of a contingency plan for an event
- 5 describe the types of problems that may occur when organising an event and how to solve them
- 6 categorise different types of events and their main features

### **Outcome 2 Understand the arrangements to be made when planning and organising an event**

The learner can:

- 1 explain the role of the event organiser for
  - a) anticipating and planning for all delegate provision and needs before and during the event, including investigating and providing for any special requirements
  - b) meeting relevant health, safety and security arrangements
  - c) meeting legal and organisational requirements for contracts
  - d) organising resources and the production of event materials
  - e) the types of activities and resources that may be needed during an event
  - f) liaison with the venue and the supporting team to make sure all requirements are met and roles are understood

### **Outcome 3 Understand the different types of venues and resources needed for different types of events**

The learner can:

- 1 identify and evaluate different types of venue in terms of suitability for events and costs
- 2 describe a range of resources that may be needed for events and illustrate how they may be used
- 3 identify examples, and explain the purpose and benefits of selection criteria when choosing a venue and resources for an event

### **Outcome 4 Be able to plan and organise an event**

The learner can:

- 1 agree an event brief and budget
- 2 agree a plan for an event, which will meet agreed objectives and address any identified risks and contingencies
- 3 identify and agree resources and support needed for organising an event
- 4 agree requirements for venue(s)
- 5 identify venue and agree costings
- 6 liaise with the venue to confirm event requirements and / or any special delegate requirements
- 7 agree requirements for resources
- 8 co-ordinate resources and production of event materials
- 9 make sure arrangements are in place for the event to meet relevant health, safety and security requirements
- 10 make sure legal and organisational requirements for contracts are met
- 11 make sure that all those involved are briefed and trained to fulfil their roles
- 12 delegate functions to the event team as required

- 13 make arrangements for rehearsals to make sure the event runs smoothly, if required
- 14 make sure invitations are sent out to delegates
- 15 manage delegate responses
- 16 prepare joining instructions and event materials to be sent to delegates



# BA321

## Co-ordinate an event





## **BA321 Co-ordinate an event**

**Level: 3**

**Credit value: 4**

### **Unit aims**

This unit is about co-ordinating the delivery of an event.

### **Learning outcomes**

There are **three** learning outcomes to this unit. The learner will:

1. Understand the role of an event co-ordinator in managing an event to meet the objectives of the brief
2. Understand the activities required when co-ordinating an event
3. Be able to co-ordinate an event

### **Guided learning hours**

It is recommended that **30** 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 (if appropriate)**

This unit is linked to the National Occupational Standards for Business and Administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for Business and Administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- budget
- reconciliations
- event records

**Evidence generated for this unit of assessment may contribute towards other units including: Units BA301, BA302, BA303, BA305**

## **BA321 Co-ordinate an event**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the role of an event co-ordinator in managing an event to meet the objectives of the brief**

The learner can:

- 1 explain the responsibilities of an event co-ordinator
- 2 describe the purpose of agreeing a plan that meets the objectives of the event brief

### **Outcome 2 Understand the activities required when co-ordinating an event**

The learner can:

- 1 explain the role of the event co-ordinator during the event for:
  - a) all delegate provision and needs
  - b) meeting relevant health, safety and security requirements
  - c) observing legal and organisational requirements for contracts
  - d) co-ordinating resources and the use of event materials
  - e) liaising with the venue and supporting team during an event to make sure all requirements are met and roles are carried out
  - f) resolving problems
  - g) overseeing the work of key staff
- 2 explain the role of an event co-ordinator after an event for:
  - a) clearing and vacating the venue
  - b) organising follow up papers and activities, if required
  - c) reconciling accounts to budget
  - d) evaluating an event and the methods that can be used to do this

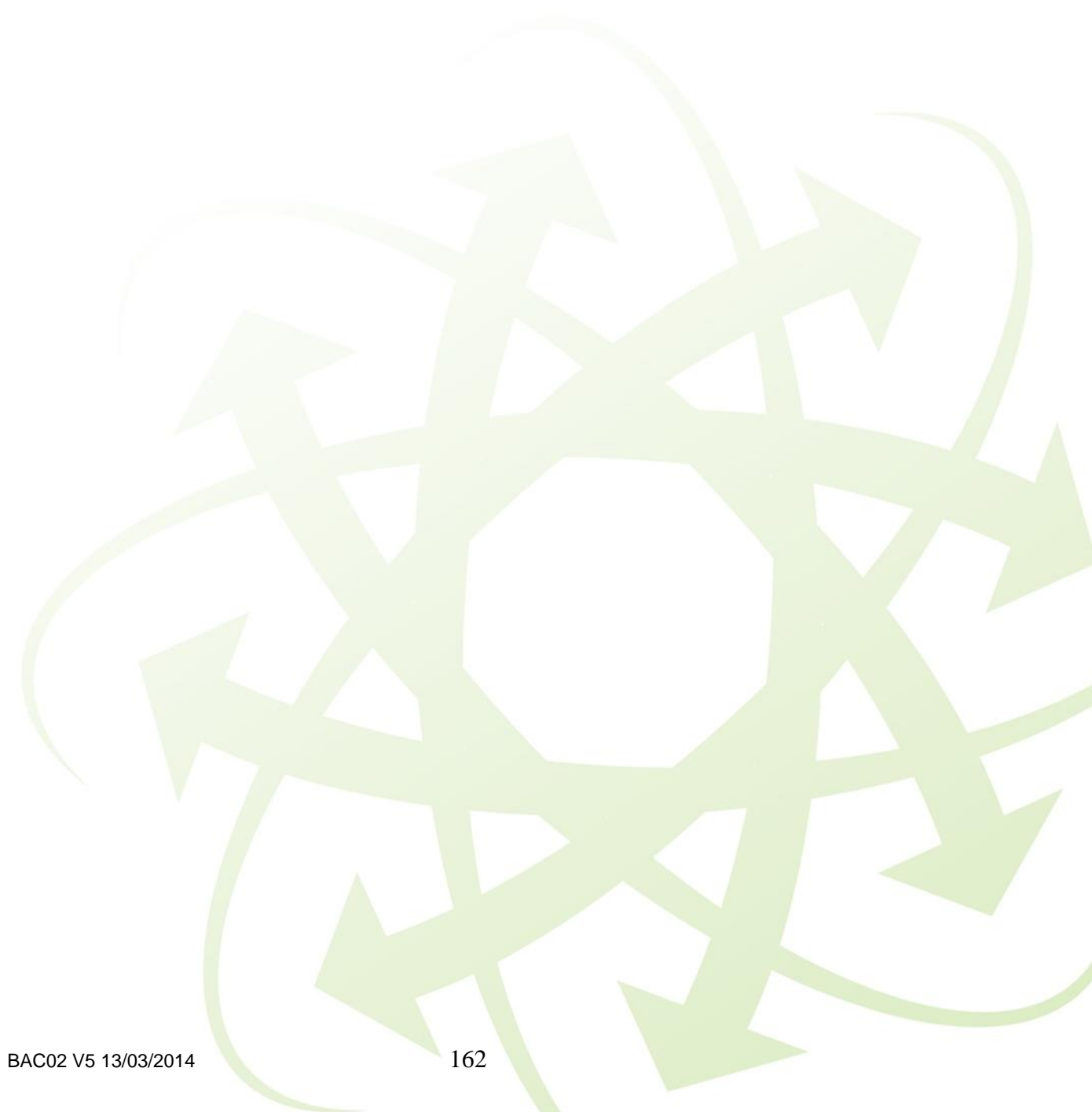
### **Outcome 3 Be able to co-ordinate an event**

The learner can:

- 1 prepare the venue and make sure all necessary resources are in place
- 2 co-ordinate activities during an event, in line with agreed plans
- 3 help delegates to feel welcome
- 4 respond to delegates' needs throughout an event
- 5 resolve problems, as required
- 6 oversee the work of key staff during the event
- 7 monitor compliance with relevant health, safety and security requirements
- 8 liaise with the management of the venue to make sure facility resources are in place
- 9 arrange clearing, and vacating the venue according to the terms of the contract
- 10 prepare and circulate papers, or complete other follow up actions following the event, if required
- 11 reconcile accounts to budget, if required
- 12 evaluate an event identifying recommendations and passing these on to relevant colleagues, where relevant
- 13 agree key learning points and use these to improve the running of future events

# **BA322**

## **Plan and organise meetings**



## **BA322 Plan and organise meetings**

**Level: 3**

**Credit value: 5**

### **Unit aims**

This unit is about planning and organising meetings to meet the agreed purpose of the meeting.

### **Learning outcomes**

There are **three** learning outcomes to this unit. The learner will:

1. Understand the arrangements and actions required for planning and organising meetings
2. Be able to prepare for a meeting
3. Be able to support running a meeting
4. How to follow up a meeting

### **Guided learning hours**

It is recommended that **25** 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 (if appropriate)**

This unit is linked to the National Occupational Standards for Business and Administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for Business and Administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- agenda
- meeting papers
- records
- evaluations
- budget

**Evidence generated for this unit of assessment may contribute towards other units including: Units BA301, BA302, BA303, BA305**

## **BA322 Plan and organise meetings**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the arrangements and actions required for planning and organising meetings**

The learner can:

- 1 explain the role of the person planning and organising a meeting
- 2 describe the different types of meetings and their main features
- 3 explain how to plan meetings that meet agreed aims and objectives
- 4 explain the purpose of agreeing a brief for the meeting
- 5 explain how to identify suitable venues for different types of meetings
- 6 describe the types of resources needed for different types of meetings
- 7 outline the main points that should be covered by an agenda and meeting papers
- 8 explain the purpose of meeting attendees' needs and special requirements, and providing them with information required for meetings
- 9 describe the health, safety and security requirements that need to be considered when organising meetings
- 10 explain the purpose and benefits of briefing the chair before a meeting
- 11 explain the purpose of welcoming and providing suitable refreshments to attendees, if required
- 12 describe the types of information, advice and support that may be need to be provided during a meeting
- 13 describe the types of problems that may occur during a meeting and how to solve them
- 14 explain what should be included in a record of a meeting, and the purpose of ensuring the record is accurate and approved
- 15 explain how to record actions and follow up, if required
- 16 explain the purpose of collecting and evaluating participant feedback from the meeting
- 17 describe how to agree learning points to improve the organisation of future meetings

### **Outcome 2 Be able to prepare for a meeting**

The learner can:

- 1 agree and prepare the meeting brief, checking with others, if required
- 2 agree a budget for the meeting, if required
- 3 prepare and agree an agenda and meeting papers
- 4 organise and confirm venue, equipment and catering requirements, when necessary
- 5 invite attendees, confirm attendance and identify any special requirements
- 6 arrange catering, if required
- 7 arrange the equipment and layout of the room, if required
- 8 make sure the chair receives appropriate briefing

### **Outcome 3 Be able to support running a meeting**

The learner can:

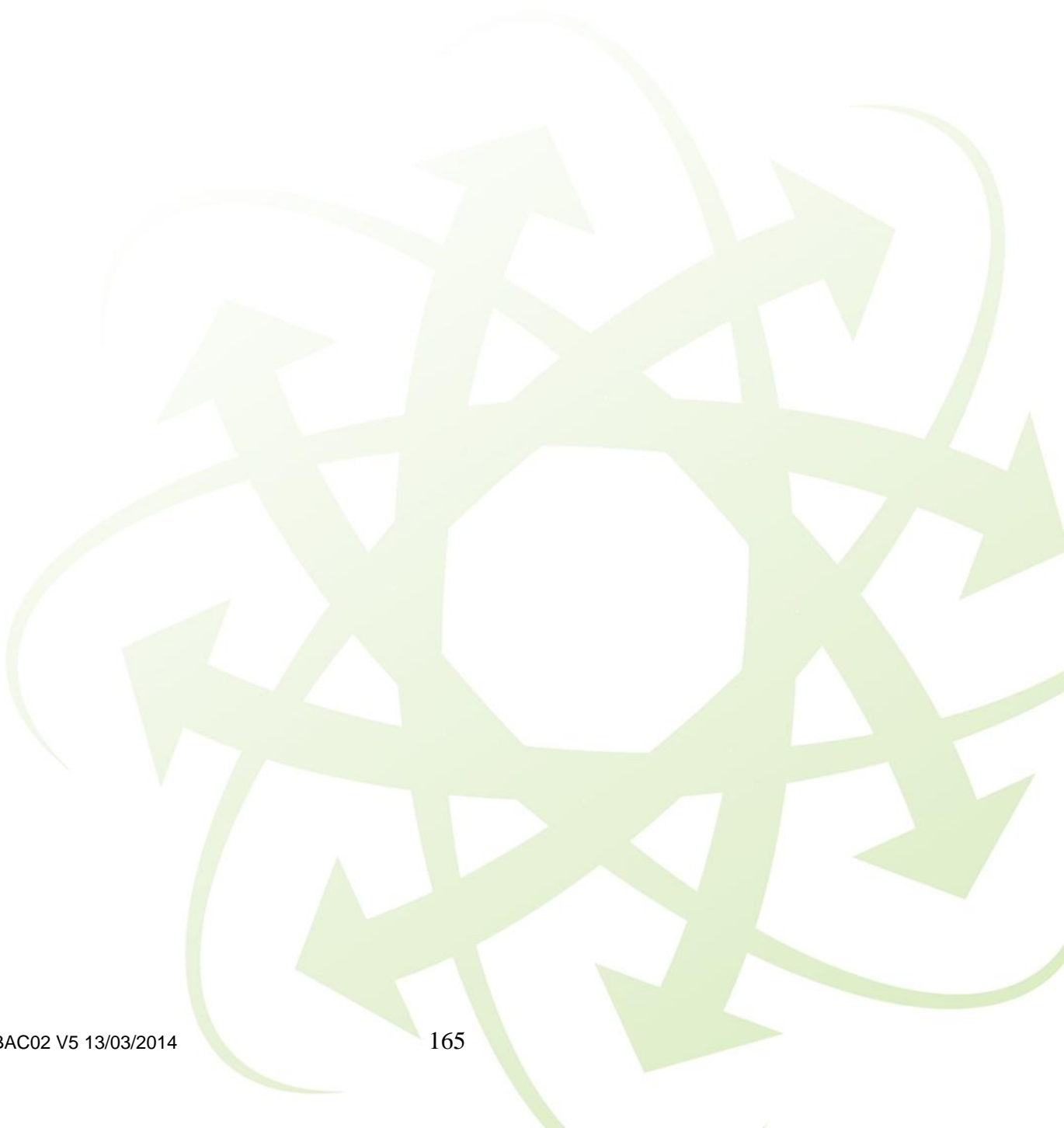
- 1 welcome attendees and offer suitable refreshments (if required)
- 2 make sure attendees have full set of papers
- 3 make sure a person has been nominated to take minutes, if required
- 4 provide information, advice and support when required

### **Outcome 4 How to follow up a meeting**

The learner can:

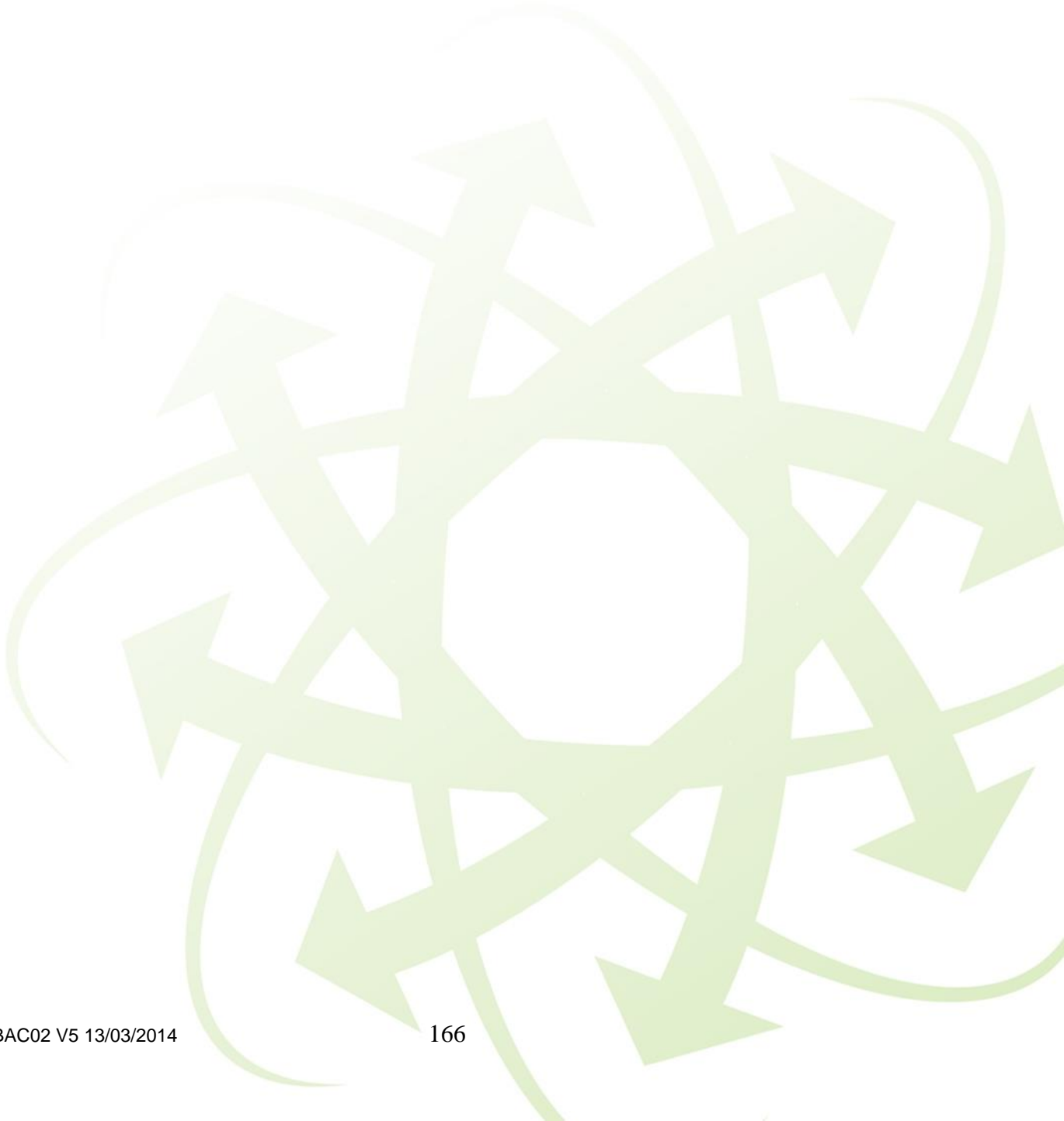
- 1 produce a record of the meeting
- 2 seek approval for the meeting record, amend as required
- 3 respond to requests for amendments and arrange recirculation of a revised meeting record
- 4 follow up action points, if required
- 5 evaluate meeting arrangements, and external services where used

- 6 evaluate participant feedback from the meeting and share results with relevant people, where used
- 7 summarise learning points and use these to identify improvements that can be made to future meeting arrangements and support



# **BA326**

**Contribute to innovation in a business environment**



## **BA326      Contribute to innovation in a business environment**

**Level: 3**

**Credit value: 4**

### **Unit aims**

This unit is about recognising the affects of changes in workplace activities and the people who carry them out

### **Learning outcomes**

There are **six** learning outcomes to this unit. The learner will:

1. Understand the purpose and benefits of innovation in a business environment
2. Understand how to contribute to research, develop and review ideas for new approaches and solutions
3. Understand how to present suggestions for new approaches and solutions
4. Be able to contribute to research and develop ideas
5. Be able to present suggestion for new approaches and solutions
6. Be able to evaluate, review and make suggestions for new approaches and solutions

### **Guided learning hours**

It is recommended that **30** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- minutes of meetings
- information collected
- feedback given
- reports
- presentations

**Evidence generated for this unit of assessment may contribute towards other units including: Units BA301, BA302, BA303, BA304, BA305, BA306**



## **BA326      Contribute to innovation in a business environment**

Learning outcomes and assessment criteria

### **Outcome 1    Understand the purpose and benefits of innovation in a business environment**

The learner can:

- 1 explain the purpose of innovation as a way of staying competitive and offering new solutions
- 2 explain the purpose of questioning existing ways of working in own area of work and assumptions about them

### **Outcome 2    Understand how to contribute to research, develop and review ideas for new approaches and solutions**

The learner can:

- 1 explain the purpose of reviewing existing working methods, products or services
- 2 explain ways of reviewing existing working methods, products or services
- 3 identify sources of information for new approaches and solutions
- 4 describe ways of collecting information on possible improvements
- 5 explain the purpose of working with others when developing new approaches and solutions
- 6 explain the benefits of working with others when agreeing how to present ideas to decision-makers, and ways of doing so
- 7 explain how to work with others to develop and agree an idea
- 8 explain how to decide when an idea is, or is not possible
- 9 explain the purpose of reviewing and learning from mistakes

### **Outcome 3    Understand how to present suggestions for new approaches and solutions**

The learner can:

- 1 explain the purpose of selling ideas to decision-makers
- 2 describe how to present and sell suggestions for new approaches and solutions to decision-makers to achieve a positive outcome

### **Outcome 4    Be able to contribute to research and develop ideas**

The learner can:

- 1 question constructively existing ways of working in own area of responsibility
- 2 contribute to researching and identifying possible improvements to working methods, products or services in own area of responsibility
- 3 contribute to the collection of information that can be used to develop ideas for new approaches and solutions
- 4 agree criteria for evaluating ideas including fit with organisational aims and objectives

### **Outcome 5    Be able to present suggestion for new approaches and solutions**

The learner can:

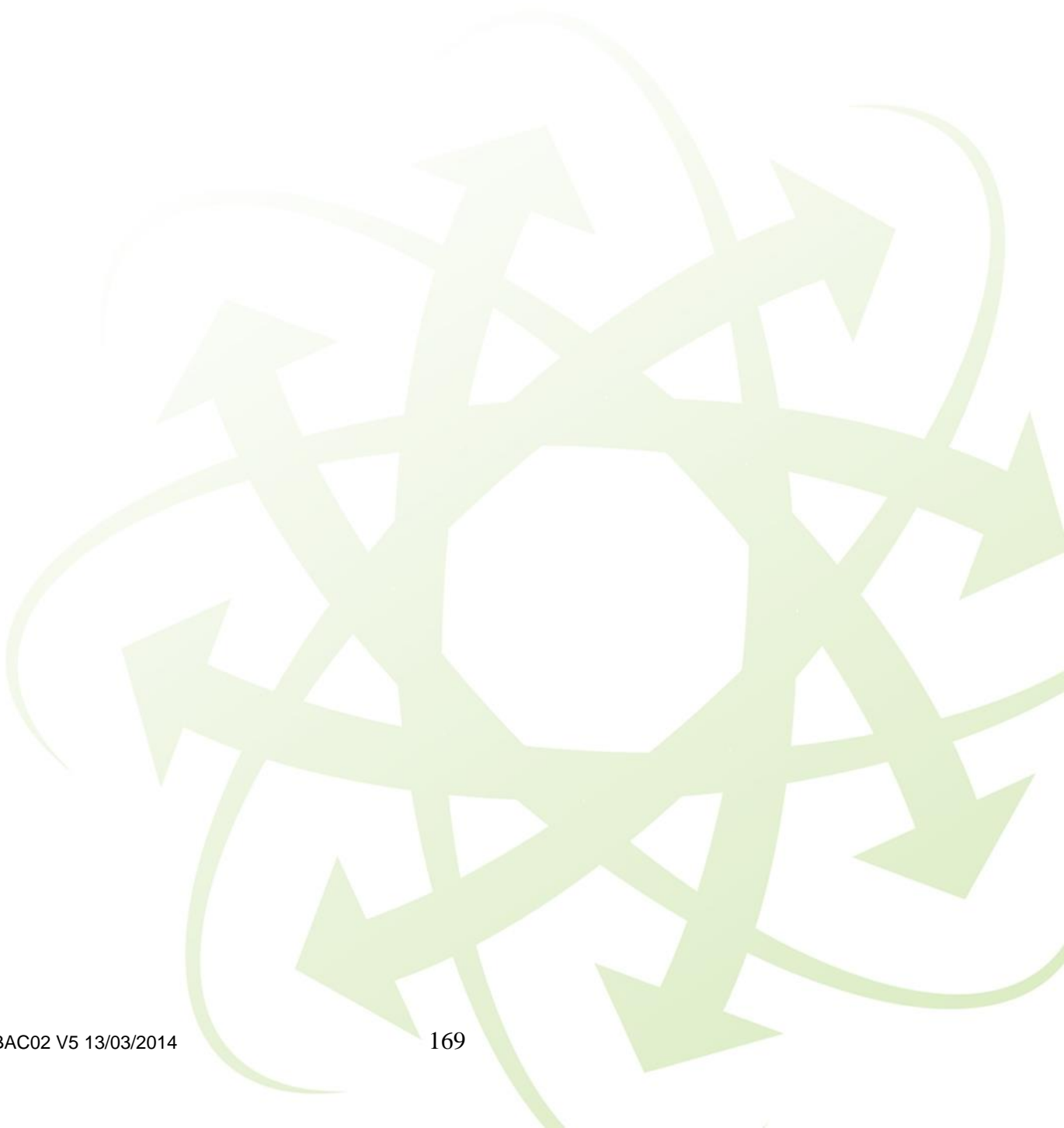
- 1 present and sell suggestions for new approaches and /or solutions
- 2 communicate risks to others in a suitable format

### **Outcome 6    Be able to evaluate, review and make suggestions for new approaches and solutions**

The learner can:

- 1 contribute to the evaluation of ideas for new approaches and solutions using
  - a) fit with organisational aims and objectives
  - b) other agreed criteria
- 2 evaluate ideas to challenge own assumptions and thinking about ways of working, products or services
- 3 contribute to the selling of ideas to others

- 4 seek feedback on ideas, analyse feedback. and show a willingness to compromise
- 5 contribute to the assessment of idea(s) and decide whether a suggestion for a new approach / solution is possible



# BA327

## Contribute to running a project



## **BA327      Contribute to running a project**

**Level: 3**

**Credit value: 5**

### **Unit aims**

This unit is about contributing to achieving project's agreed aims and objectives as it impacts on stakeholders

### **Learning outcomes**

There are **six** learning outcomes to this unit. The learner will:

1. Understand how to contribute to agree to a project brief
2. Understand how to contribute to a project
3. Understand the purpose of contributing to the evaluation of a project
4. Be able to contribute to preparing and planning a project
5. Be able to contribute to running a project
6. Be able to contribute to evaluating the outcomes of a project

### **Guided learning hours**

It is recommended that **30** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- minutes of meetings
- reports
- adapted plans

**Evidence generated for this unit of assessment may contribute towards other units including: Units BA301, BA302, BA303, BA304, BA305, BA306, BA307, BA308**

## **BA327      Contribute to running a project**

Learning outcomes and assessment criteria

### **Outcome 1    Understand how to contribute to agree to a project brief**

The learner can:

- 1 describe the difference between routine work and taking part in a project
- 2 explain the advantages and disadvantages of using projects and when projects are appropriate
- 3 explain the project-planning methodologies appropriate to the types of projects run and the tools that can be used to assist project planning and control
- 4 explain the purpose and benefits of identifying stakeholders involved in the project
- 5 explain the purpose of contributing to agreeing a project's purpose, scope, timescale, costs, aims and objectives
- 6 explain the purpose of agreeing a budget for a project
- 7 describe how to estimate types and quantity of resources needed to run a project
- 8 describe how to identify project risks and develop contingency plans, if required

### **Outcome 2    Understand how to contribute to a project**

The learner can:

- 1 describe the types of information needed to monitor projects and the methods that can be used to give information
- 2 describe how to estimate and control resources in an area of work during a project
- 3 explain the purpose of reporting own progress during a project
- 4 outline reasons for seeking advice in response to unexpected events
- 5 explain the purpose and benefits of contributing towards achieving projects within agreed timescales
- 6 explain the purpose and benefits of keeping records of all project activity within the scope of own work
- 7 describe different ways of communicating with those involved in or affected by a project to make sure it runs smoothly

### **Outcome 3    Understand the purpose of contributing to the evaluation of a project**

The learner can:

- 1 describe different types of methods available to monitor projects
- 2 explain the purpose of making own contributions when evaluating projects
- 3 describe how to learn lessons for the future for own work

### **Outcome 4    Be able to contribute to preparing and planning a project**

The learner can:

- 1 confirm the purpose of the project with all stakeholders
- 2 confirm project scope, timescale, aims and objectives
- 3 contribute to the preparation of a project specification
- 4 confirm all types of resources for all stakeholders
- 5 confirm with all stakeholders, the project plan and timed use of all types of resources for an area of work
- 6 contribute to identifying risks and develop contingency plans for an area of work

## **Outcome 5 Be able to contribute to running a project**

The learner can:

- 1 implement a project
- 2 communicate with all stakeholders involved with or affected by a project
- 3 adapt project plans for stakeholders to respond to unexpected events and risks
- 4 provide interim reports on project progress to relevant stakeholders
- 5 achieve required outcomes for relevant stakeholders on time and to budget
- 6 seek advice in response to unexpected events, if required
- 7 keep records of project activity

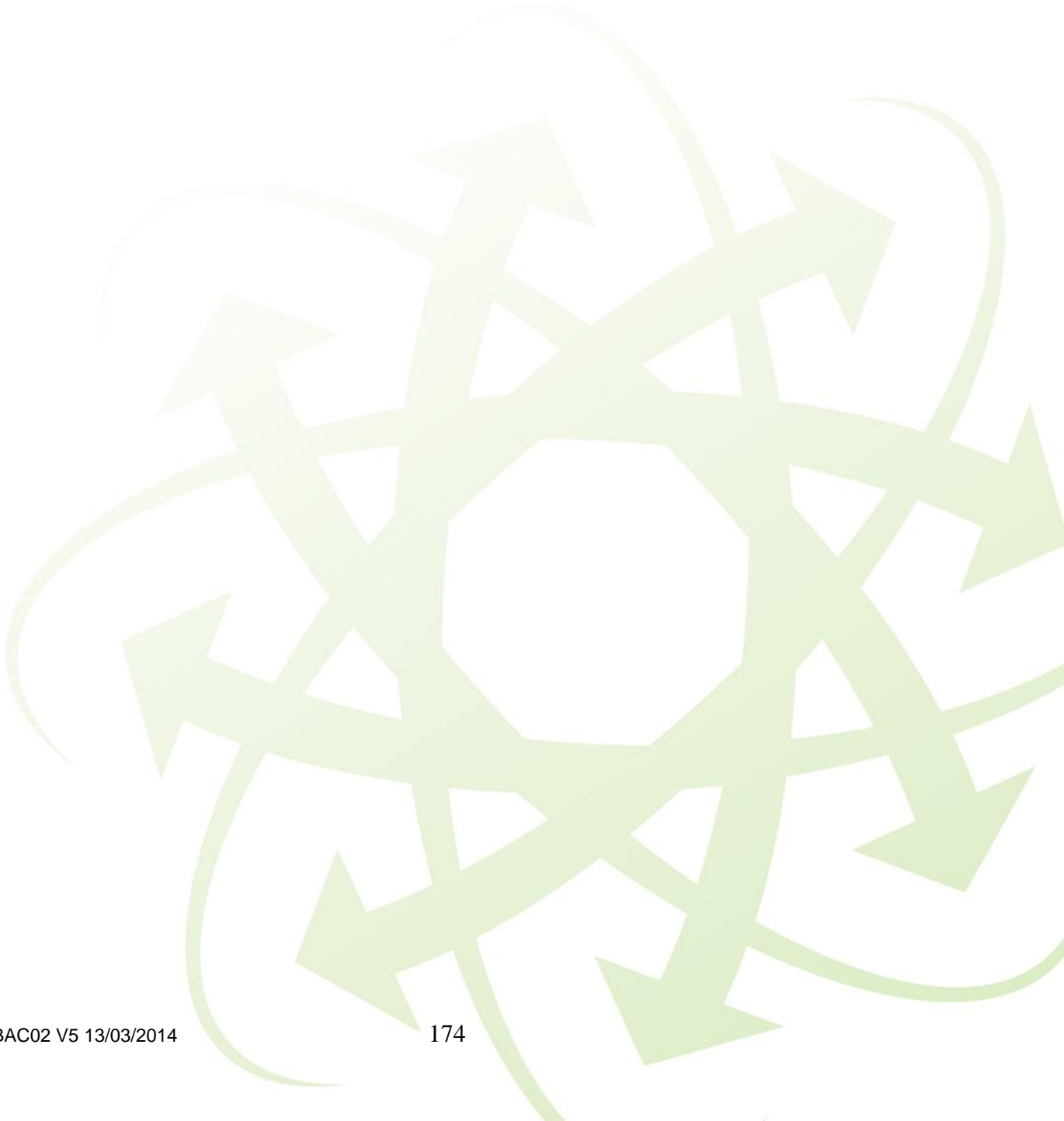
## **Outcome 6 Be able to contribute to evaluating the outcomes of a project**

The learner can:

- 1 evaluate project for all stakeholders
- 2 report on the degree to which a project met its aims and objectives for all stakeholders
- 3 report on project strengths and areas for improvement for all stakeholders

## **BA328**

**Deliver, monitor and evaluate  
customer service to internal customers**



## **BA328 Deliver, monitor and evaluate customer service to internal customers**

**Level: 3**

**Credit value: 3**

### **Unit aims**

This unit is about providing and continuously improving services to internal customers.

### **Learning outcomes**

There are **ten** learning outcomes to this unit. The learner will:

1. Understand the meaning of internal customer
2. Know the types of products and services relevant to internal customers
3. Understand how to deliver customer service that meets or exceeds internal customer expectations
4. Understand the purpose of quality standards and timescales for delivering customer service
5. Understand how to deal with internal customer service problems
6. Understand how to monitor and evaluate internal customer service and the benefits of this
7. Be able to build positive working relationships with internal customers
8. Be able to deliver customer services to agreed quality standards and timescales
9. Be able to deal with internal customer service problems and complaints
10. Be able to monitor and evaluate customer services to internal customers

### **Guided learning hours**

It is recommended that **12** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- feedback received

**Evidence generated for this unit of assessment may contribute towards other units including: Units BA301, BA302, BA303, BA305**



## **BA328 Deliver, monitor and evaluate customer service to internal customers**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the meaning of internal customer**

The learner can:

- 1 describe what is meant by internal customers

### **Outcome 2 Know the types of products and services relevant to internal customers**

The learner can:

- 1 describe the products and services offered by own organisation to internal customers

### **Outcome 3 Understand how to deliver customer service that meets or exceeds internal customer expectations**

The learner can:

- 1 explain the purpose and value of identifying internal customer needs and expectations
- 2 explain why customer service must meet or exceed internal customer expectations
- 3 explain the value of meeting or exceeding internal customer expectations
- 4 explain the purpose and value of building positive working relationships

### **Outcome 4 Understand the purpose of quality standards and timescales for delivering customer service**

The learner can:

- 1 identify quality standards for own organisation and work
- 2 explain the value of agreeing quality standards and timescales
- 3 explain how to set and meet quality standards and timescales with internal customers

### **Outcome 5 Understand how to deal with internal customer service problems**

The learner can:

- 1 describe the types of problems that internal customers may have
- 2 explain ways of dealing with problems
- 3 explain the purpose and value of a complaints procedure, if applicable

### **Outcome 6 Understand how to monitor and evaluate internal customer service and the benefits of this**

The learner can:

- 1 explain the purpose and benefits of monitoring internal customer satisfaction and how to do so
- 2 describe techniques for collecting and evaluating customer feedback
- 3 explain the benefits of continuous improvement

### **Outcome 7 Be able to build positive working relationships with internal customers**

The learner can:

- 1 identify internal customers
- 2 confirm internal customer needs in terms of products and services
- 3 confirm internal customer needs in terms of quality standards and timescales
- 4 agree procedures to be followed if internal customer needs are not met

**Outcome 8 Be able to deliver customer services to agreed quality standards and timescales**

The learner can:

- 1 provide customer service(s) to agreed quality standards
- 2 provide customer service(s) to agreed timescales
- 3 check internal customer needs and expectations have been met

**Outcome 9 Be able to deal with internal customer service problems and complaints**

The learner can:

- 1 follow procedures, within agreed timescale, to
  - a) process problems and complaints
  - b) resolve problems and complaints
  - c) refer problems and complaints, where necessary

**Outcome 10 Be able to monitor and evaluate customer services to internal customers**

The learner can:

- 1 obtain and record internal customer feedback
- 2 analyse and evaluate internal customer feedback
- 3 take action that will lead to improvement in customer service(s) to internal customers

## **BA329**

**Deliver, monitor and evaluate  
customer service to external customers**



## **BA329 Deliver, monitor and evaluate customer service to external customers**

**Level: 3**

**Credit value: 3**

### **Unit aims**

This unit is about providing and continuously improving customer services to external customers.

### **Learning outcomes**

There are **ten** learning outcomes to this unit. The learner will:

1. Understand the meaning of external customer
2. Know the types of products and services relevant to external customers
3. Understand how to deliver customer service that meets or exceeds external customer expectations
4. Understand the purpose of quality standards and timescales for delivering customer service
5. Understand how to deal with external customer service problems
6. Understand how to monitor and evaluate external customer service and the benefits of this
7. Be able to build positive working relationships with external customers
8. Be able to deliver customer services to agreed quality standards and timescales
9. Be able to deal with external customer service problems and complaints
10. Be able to monitor and evaluate customer services to external customers

### **Guided learning hours**

It is recommended that **12** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- letters
- emails
- memos
- feedback received

**Evidence generated for this unit of assessment may contribute towards other units including: Units BA301, BA302, BA303, BA305**

## **BA329 Deliver, monitor and evaluate customer service to external customers**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the meaning of external customer**

The learner can:

- 1 describe what is meant by external customers

### **Outcome 2 Know the types of products and services relevant to external customers**

The learner can:

- 1 describe the products and services offered by the organisation to external customers

### **Outcome 3 Understand how to deliver customer service that meets or exceeds external customer expectations**

The learner can:

- 1 explain the purpose and value of identifying customer needs and expectations
- 2 explain why customer service must meet or exceed customer expectations
- 3 explain the value of meeting or exceeding customer expectations
- 4 explain the purpose and value of building positive working relationships

### **Outcome 4 Understand the purpose of quality standards and timescales for delivering customer service**

The learner can:

- 1 Identify quality standards for own organisation and work
- 2 explain the value of agreeing quality standards and timescales
- 3 explain how to set and meet quality standards and timescales with external customers

### **Outcome 5 Understand how to deal with external customer service problems**

The learner can:

- 1 describe the types of problems that external customers may have
- 2 explain the consequences of not meeting external customer needs and expectations
- 3 explain ways of dealing with external customer services problems
- 4 explain the purpose and value of a complaints procedure

### **Outcome 6 Understand how to monitor and evaluate external customer service and the benefits of this**

The learner can:

- 1 explain the purpose and benefits of monitoring external customer satisfaction and how to do so
- 2 describe techniques for collecting and evaluating external customer feedback
- 3 explain the benefits of continuous improvement

### **Outcome 7 Be able to build positive working relationships with external customers**

The learner can:

- 1 identify external customers
- 2 confirm external customer needs in terms of products and services
- 3 confirm external customer needs in terms of quality standards and timescales
- 4 agree procedures to be followed if external customer needs are not met

**Outcome 8 Be able to deliver customer services to agreed quality standards and timescales**

The learner can:

- 1 provide external customer service(s) to agreed quality standards
- 2 provide external customer service(s) to agreed timescales
- 3 check external customer needs and expectations have been met

**Outcome 9 Be able to deal with external customer service problems and complaints**

The learner can:

- 1 follow procedures, within agreed timescale, to
  - a) process problems and complaints
  - b) resolve problems and complaints
  - c) refer problems and complaints, where necessary

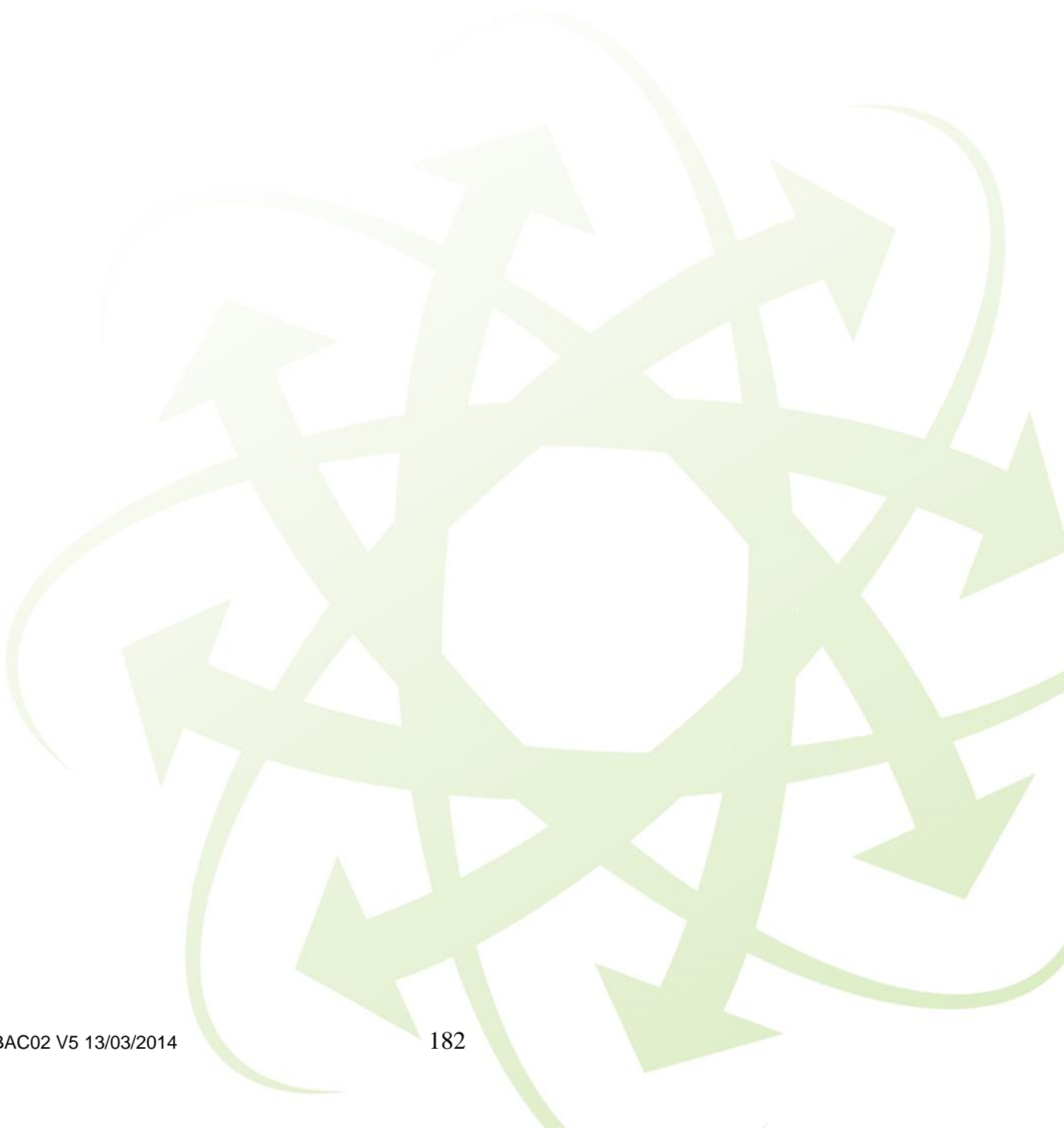
**Outcome 10 Be able to monitor and evaluate customer services to external customers**

The learner can:

- 1 obtain and record external customer feedback
- 2 analyse and evaluate external customer feedback
- 3 take actions that will lead to improvement in service(s) to external customers

## **BA330**

### Agree a budget



## **BA330      Agree a budget**

**Level: 3**

**Credit value: 4**

### **Unit aims**

This unit is about developing and agreeing a budget for a department or section within a business

### **Learning outcomes**

There are **two** learning outcomes to this unit. The learner will:

1. Understand how to develop budgets
2. Be able to agree a budget

### **Guided learning hours**

It is recommended that **25** 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 (if appropriate)**

This unit is linked to the national occupational standards for business and administration.

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Evidence may be supplied via witness testimony, professional discussion and questioning, candidate reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:

- draft budget
- budget

**Evidence generated for this unit of assessment may contribute towards other units including: Units BA301, BA302, BA303, BA304, BA305**



## **BA330 Agree a budget**

Learning outcomes and assessment criteria

### **Outcome 1 Understand how to develop budgets**

The learner can:

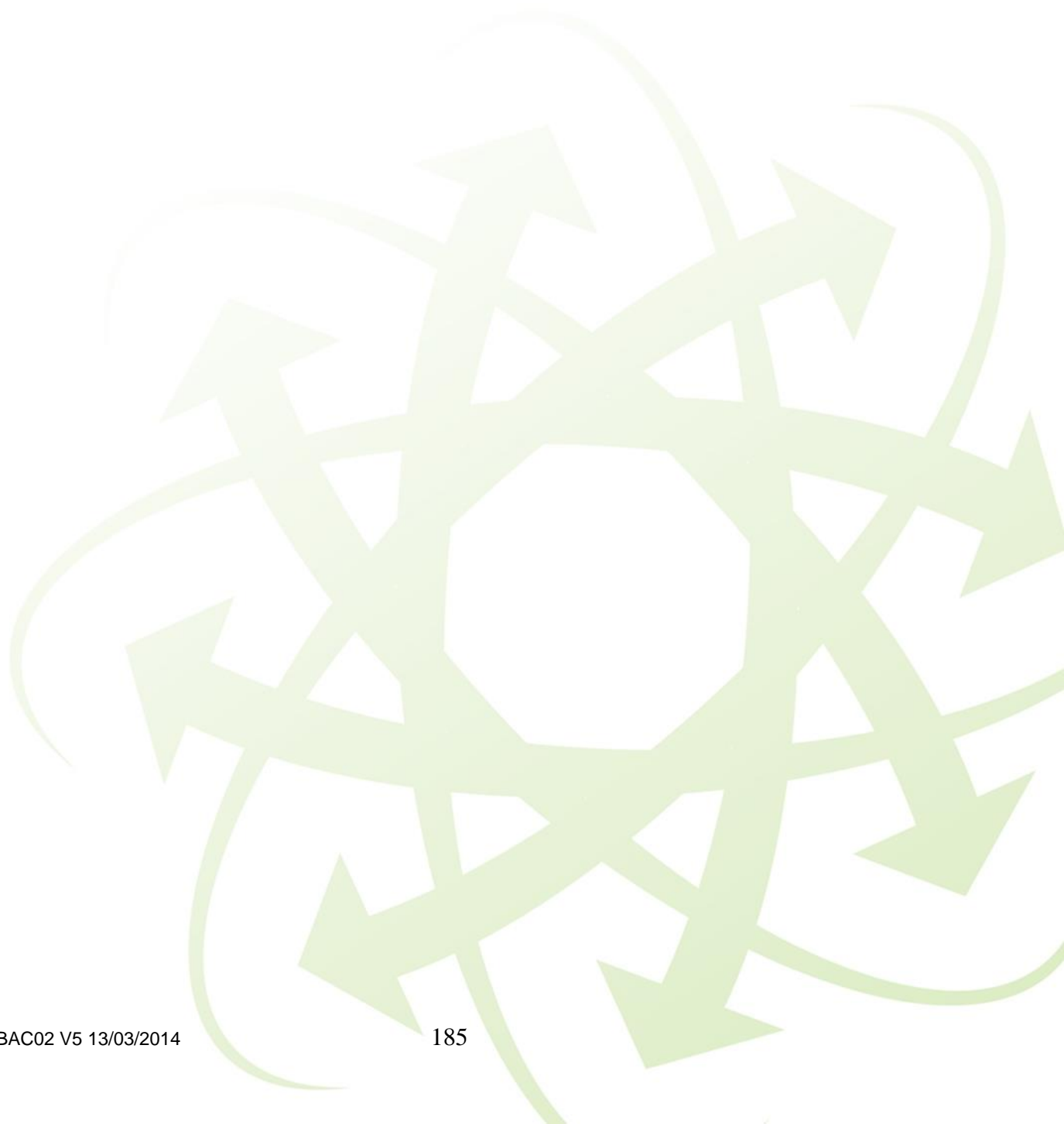
- 1 explain how to use estimations when developing a draft budget
- 2 explain how to identify priorities and financial resources needed when preparing a budget
- 3 explain the purpose and benefits of identifying priorities when preparing a budget
- 4 explain the purpose and benefits of evaluating and justifying estimated costs and income
- 5 describe procedures for negotiating superseded budgets
- 6 describe skills needed for agreeing budgets

### **Outcome 2 Be able to agree a budget**

The learner can:

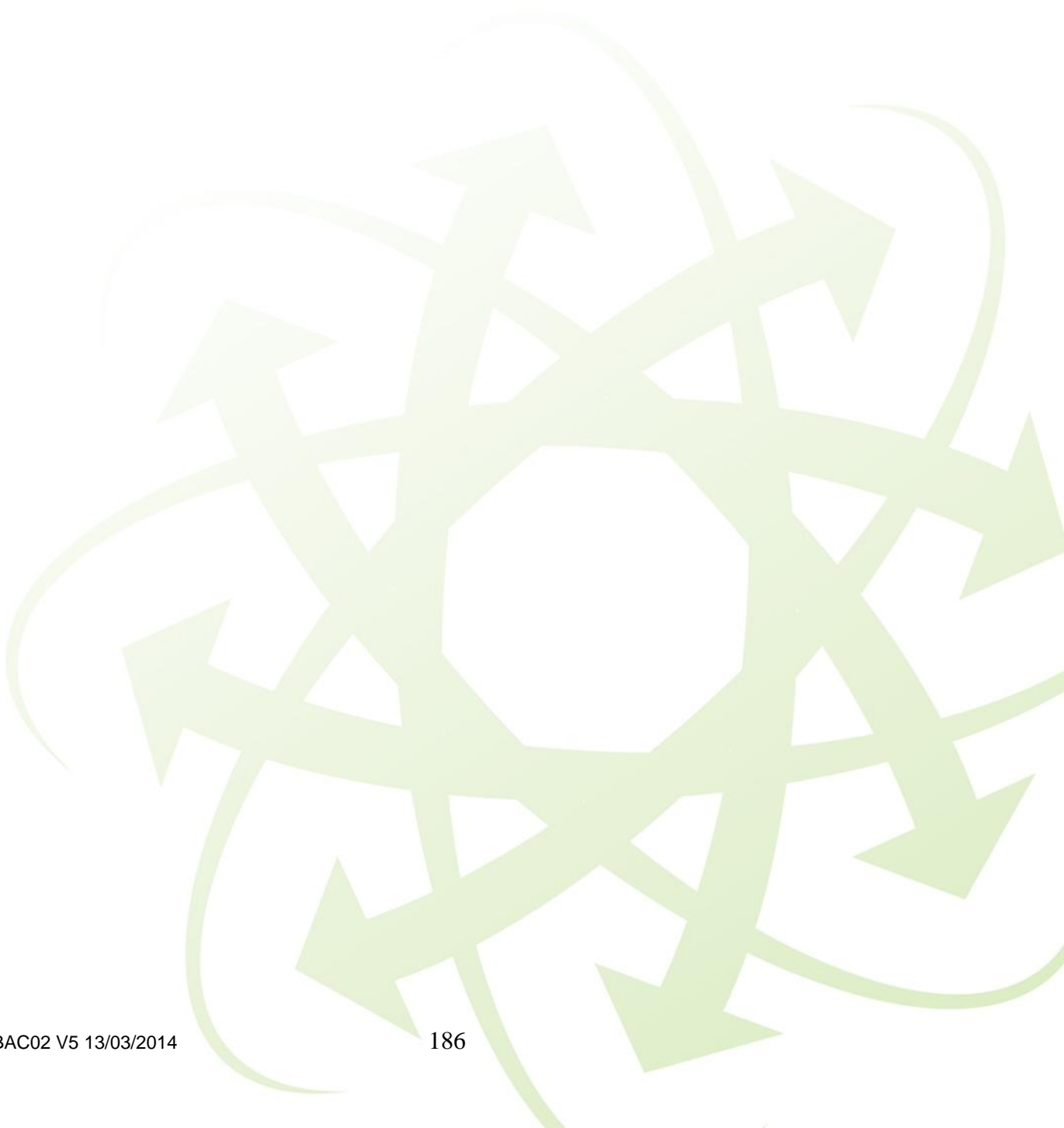
- 1 identify financial resources needed to achieve goals and objectives for agreeing a budget
- 2 evaluate and justify costs and risks
- 3 prepare a draft budget
- 4 negotiate and agree a budget

## 7.4 Group B - optional units



## **BA113**

Use occupational health and safety guidelines when using keyboards



## **BA113 Use occupational health and safety guidelines when using keyboards**

**Level: 1**

**Credit value: 2**

### **Unit aims**

This unit is about following occupational health and safety guidelines when using keyboards and workstation care and maintenance

### **Learning outcomes**

There are **two** learning outcomes to this unit. The learner will:

1. Understand the purpose of occupational health and safety procedures when using keyboards and workstation care and maintenance
2. Be able to use occupational health and safety guidelines

### **Guided learning hours**

It is recommended that **20** 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 (if appropriate)**

BAE141 Use occupational health and safety guidelines when using keyboards

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

## **BA113 Use occupational health and safety guidelines when using keyboards**

Learning outcomes and assessment criteria

### **Outcome 1 Understand the purpose of occupational health and safety procedures when using keyboards and workstation care and maintenance**

The learner can:

- 1 state occupational health and safety guidelines in relation to using keyboards
- 2 explain the purpose of following occupational health and safety guidelines for using keyboards
- 3 describe how to position fingers, wrists, forearms and back in relation to the equipment being used
- 4 describe procedures for workstation care and maintenance

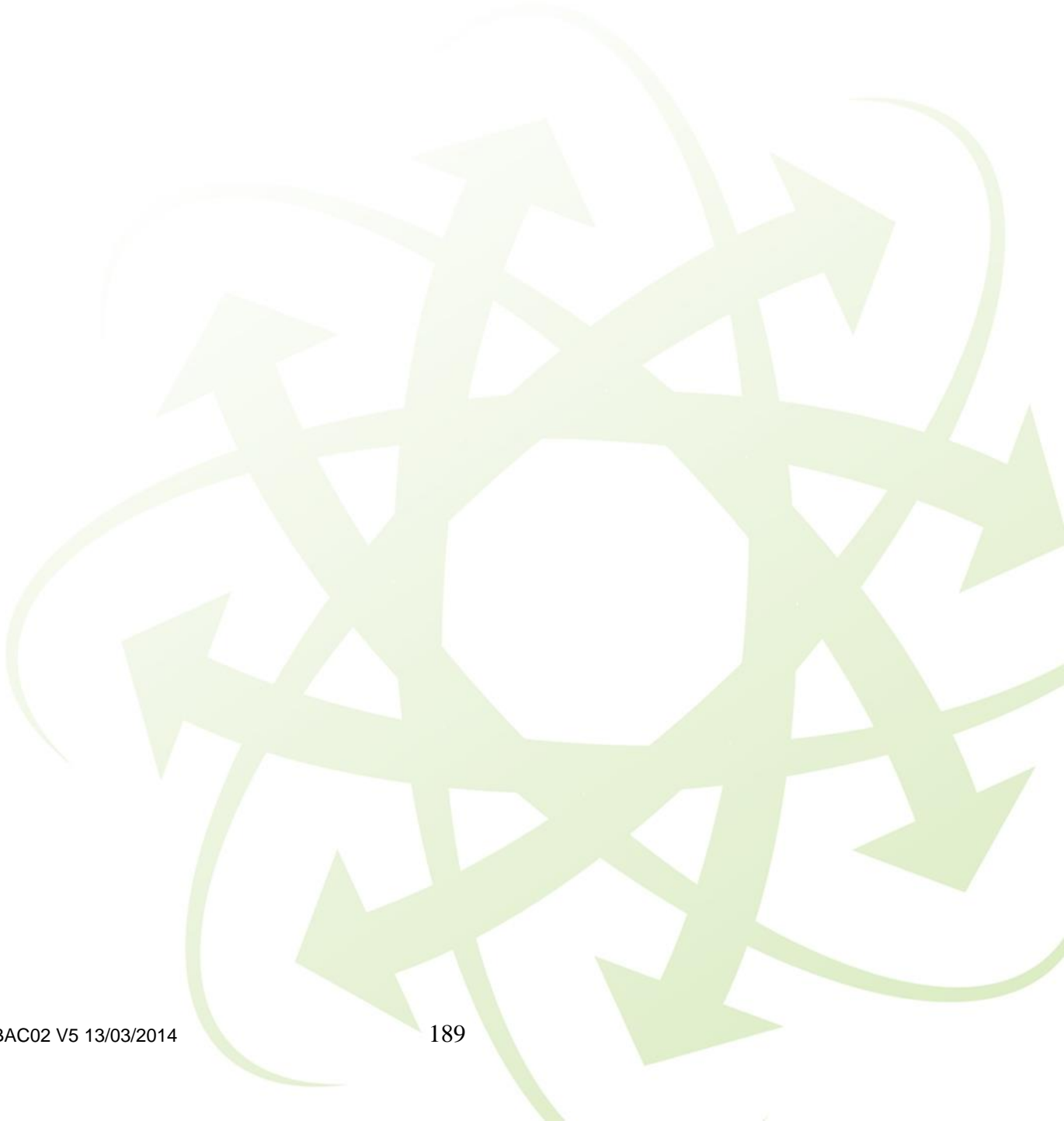
### **Outcome 2 Be able to use occupational health and safety guidelines**

The learner can:

- 1 demonstrate correct positioning of fingers, wrists, forearms and back in relation to the equipment being used
- 2 follow procedures for workstation care and maintenance
- 3 follow occupational health and safety guidelines for using keyboards
- 4 use techniques to prevent repetitive strain syndrome in accordance with occupational health and safety guidelines

# IT101

## Bespoke software



## IT101      **Bespoke software**

**Level: 1**

**Credit value: 2**

### **Unit aims**

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.

This unit is about the skills and knowledge needed by an IT User 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 pre-defined 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. This may be on a full-time or part-time basis.

### **Details of the relationship between the unit and relevant national occupational standards (if appropriate)**

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

## **IT101      Bespoke software**

Learning outcomes and assessment criteria

### **Outcome 1    Input, organise and combine information using bespoke software**

The learner can:

- 1    input relevant information accurately into existing templates and/or files so that it is ready for processing
- 2    organise and combine information of different forms or from different sources
- 3    follow local and/or legal guidelines for the storage and use of data where available
- 4    respond appropriately to data entry error messages

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

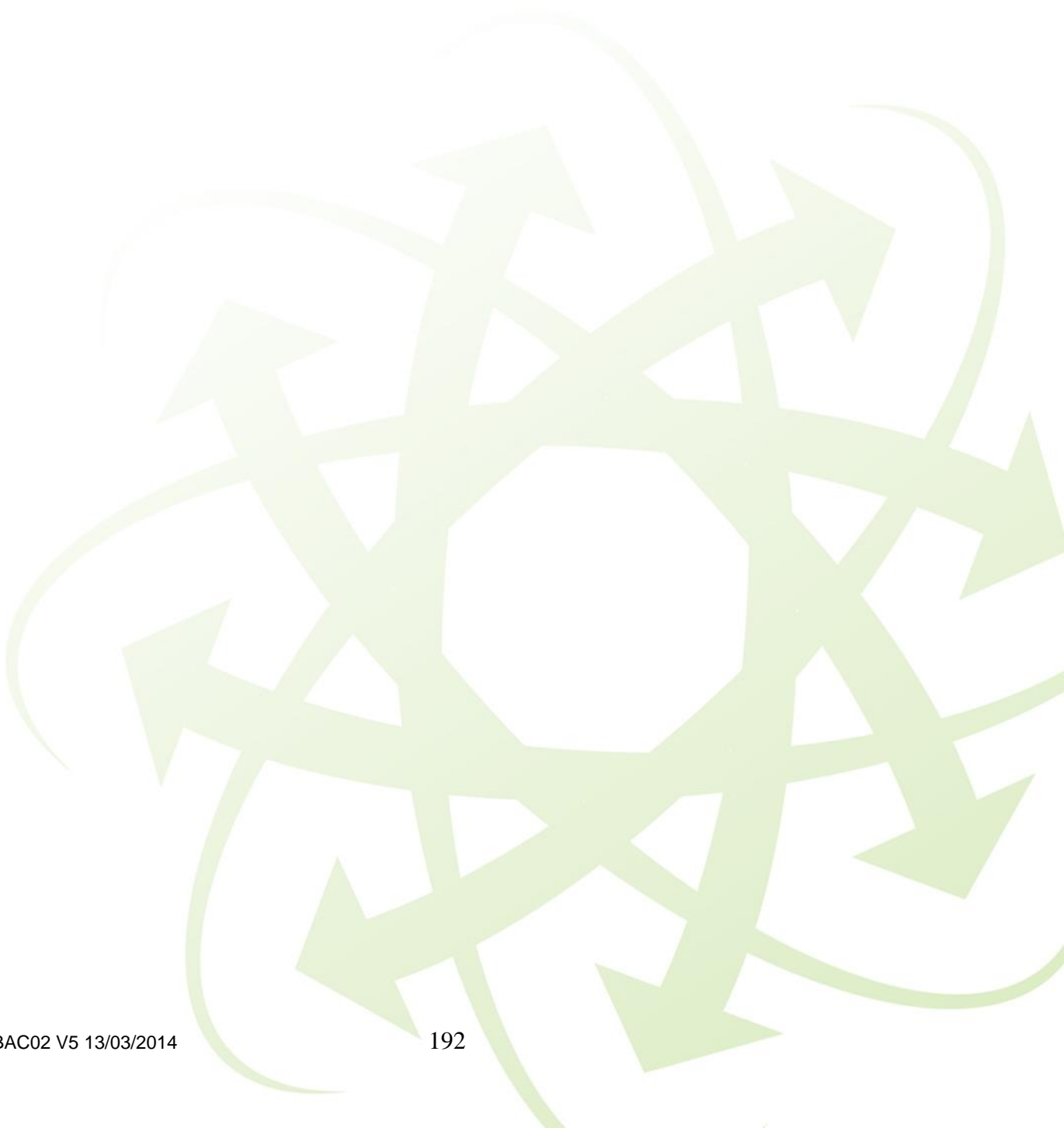
The learner can:

- 1    use appropriate tools and techniques to edit, process and format information
- 2    check information meets needs, using IT tools and making corrections as appropriate
- 3    use appropriate presentation methods and accepted layouts



# IT102

## Data management software



## IT102      Data management software

Level: 1

Credit value: 2

### Unit aims

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. Data management software is often implemented on relational database systems by providing predefined file and record structures, processes, reports and data-entry screens. This is about the use of these predefined objects. This unit is about the skills and knowledge required by an IT user 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. Any aspects that are unfamiliar will require support and advice from others.

### 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. This may be on a full-time or part-time basis.

### Details of the relationship between the unit and relevant national occupational standards (if appropriate)

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

### Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

## **IT102      Data management software**

Learning outcomes and assessment criteria

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

The learner can:

- 1    identify the security procedures used to protect data
- 2    enter data accurately into records to meet requirements
- 3    locate and amend individual data records
- 4    check data records meet needs, using IT tools and making corrections as necessary
- 5    respond appropriately to data entry error messages
- 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**

The learner can:

- 1    search for and retrieve information using predefined methods to meet given requirements
- 2    identify which report to run to output the required information
- 3    select and view specified reports to output information to meet given requirements

# IT103

## Database software



Level: 1

Credit value: 3

### Unit aims

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

This unit is about the skills and knowledge required by an IT user to use 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

### 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. This may be on a full-time or part-time basis.

### Details of the relationship between the unit and relevant national occupational standards (if appropriate)

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

### Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

## **IT103 Database software**

Learning outcomes and assessment criteria

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

The learner can:

- 1 identify the main components of a database
- 2 create a database table for a purpose using specified fields
- 3 enter structured data into records to meet requirements
- 4 locate and amend data records
- 5 respond appropriately to data entry error messages
- 6 check data meets needs, using IT tools and making corrections as necessary

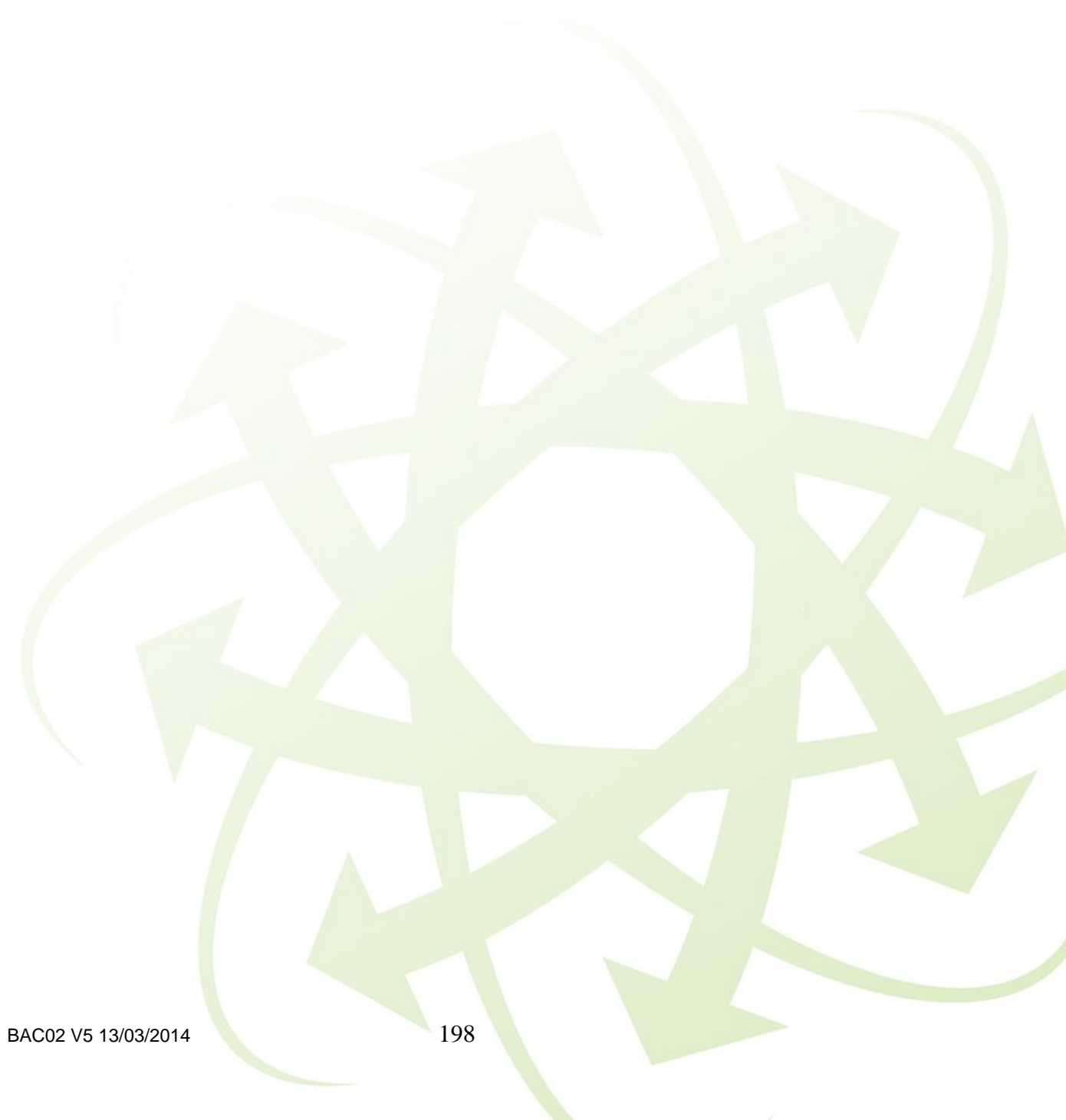
### **Outcome 2 Use database software tools to extract information and produce reports**

The learner can:

- 1 identify queries which meet information requirements
- 2 run simple database queries
- 3 identify reports which meet information requirements
- 4 generate and print pre-defined database reports

# IT104

## Improving productivity using IT



## IT104 Improving productivity using IT

Level: 1

Credit value: 3

### Unit aims

The use of IT tools and systems can improve the productivity and efficiency of work activities in a variety of contexts.

This unit is about the skills and knowledge needed by the IT User to plan and review their use of predefined or commonly used IT tools for straightforward or routine activities. 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.

An activity will typically be 'straightforward or routine' because:

- the task or context will be familiar and involve few factors (for example, time available, audience needs, message, structure); and
- the techniques used will be familiar or commonly undertaken

### 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. This may be on a full-time or part-time basis.

### Details of the relationship between the unit and relevant national occupational standards (if appropriate)

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

### Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.



## **IT104      Improving productivity using IT**

Learning outcomes and assessment criteria

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

The learner can:

- 1    identify the purpose for using IT
- 2    identify the methods, skills and resources required to complete the task successfully
- 3    plan how to carry out the task using IT to achieve the required purpose and outcome
- 4    identify reasons for choosing particular IT systems and software applications for the task
- 5    select IT systems and software applications as appropriate for the purpose
- 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**

The learner can:

- 1    identify automated routines to improve productivity
- 2    use automated routines that aid efficient processing or presentation
- 3    complete planned tasks using IT

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

The learner can:

- 1    review outcomes to make sure they meet the requirements of the task and are fit for purpose
- 2    decide whether the IT tools selected were appropriate for the task and purpose
- 3    identify the strengths and weaknesses of the completed task
- 4    identify ways to make further improvements to work

# IT105

## IT security for users



Level: 1

Credit value: 1

### Unit aims

This is the ability to protect hardware, software and the data within an IT system against theft, malfunction and unauthorised access.

This unit is about the skills and knowledge needed by the IT User 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).

### 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. This may be on a full-time or part-time basis.

### Details of the relationship between the unit and relevant national occupational standards (if appropriate)

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

### Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

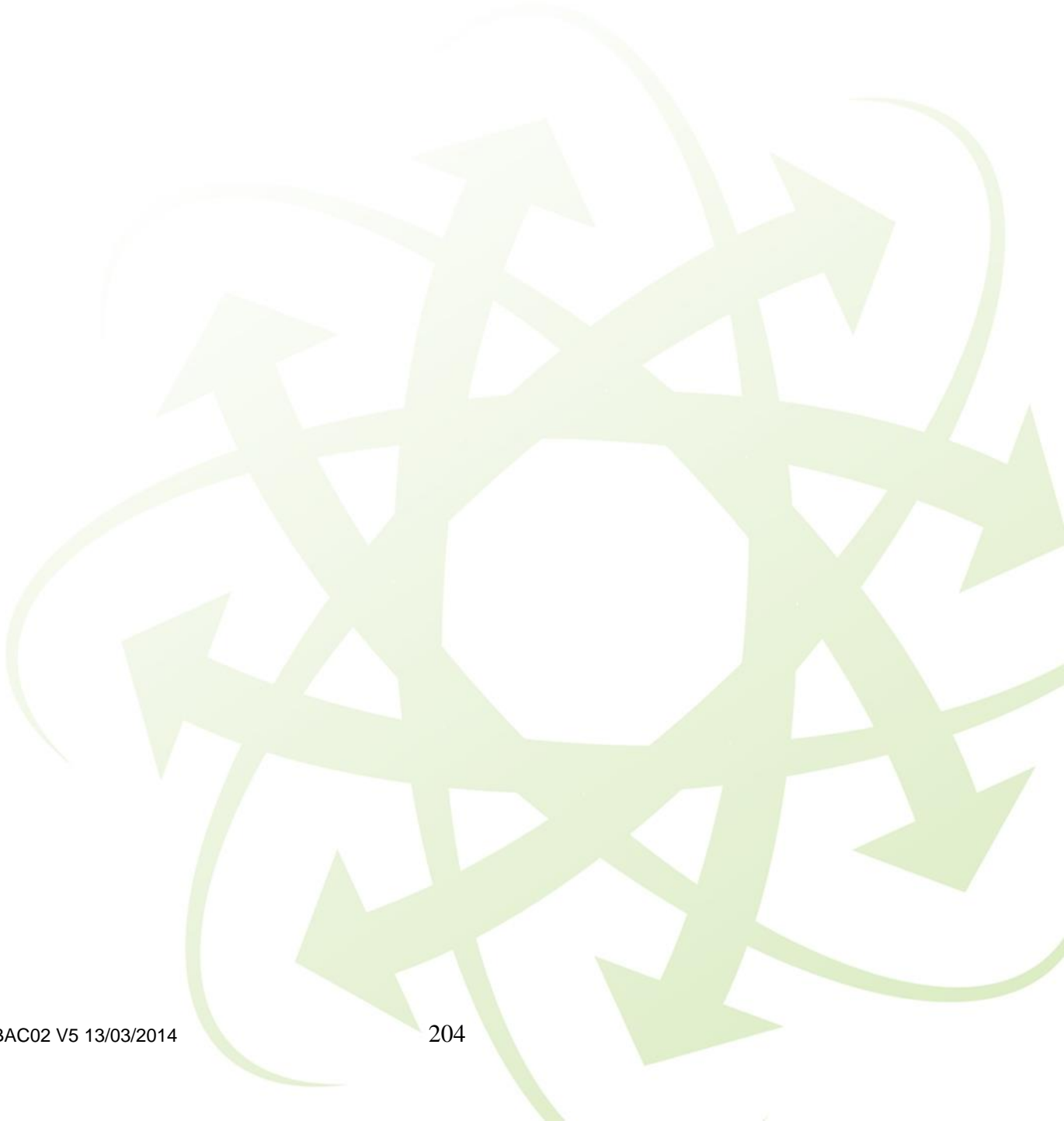
**Outcome 1 Use appropriate methods to minimise security risks to IT systems and data**

The learner can:

- 1 identify security issues that may threaten system performance
- 2 take appropriate security precautions to protect IT systems and data
- 3 identify threats to information security associated with the widespread use of technology
- 4 take appropriate precautions to keep information secure
- 5 follow relevant guidelines and procedures for the secure use of IT
- 6 describe why it is important to backup data securely
- 7 ensure personal data is backed up to appropriate media

# IT106

## Presentation software



## IT106      Presentation software

**Level: 1**

**Credit value: 3**

### **Unit aims**

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.

This unit is about the skills and knowledge required by an IT user to use a range of basic presentation software tools and techniques to produce straightforward or routine presentations. Any aspect that is unfamiliar will require support and advice from others.

Presentation tools and techniques at this level are 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

### **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. This may be on a full-time or part-time basis.

### **Details of the relationship between the unit and relevant national occupational standards (if appropriate)**

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

## **IT106      Presentation software**

Learning outcomes and assessment criteria

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

The learner can:

- 1    identify what types of information are required for the presentation
- 2    select and use different slide layouts as appropriate for different types of information
- 3    enter information into presentation slides so that it is ready for editing and formatting
- 4    identify any constraints which may affect the presentation
- 5    combine information of different forms or from different sources for presentations
- 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**

The learner can:

- 1    identify what slide structure to use
- 2    select and use an appropriate template to structure slides
- 3    select and use appropriate techniques to edit slides
- 4    select and use appropriate techniques to format slides

### **Outcome 3    Prepare slides for presentation to meet needs**

The learner can:

- 1    identify how to present slides to meet needs and communicate effectively
- 2    prepare slides for presentation
- 3    check presentation meets needs, using IT tools and making corrections as necessary

# IT107

## Set up an IT system





## IT107 Set up an IT system

Level: 1

Credit value: 3

### Unit aims

This is 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.

This unit is about the skills and knowledge 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.

### 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. This may be on a full-time or part-time basis.

### Details of the relationship between the unit and relevant national occupational standards (if appropriate)

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

### Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

## **IT107 Set up an IT system**

Learning outcomes and assessment criteria

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

The learner can:

- 1 identify what IT system components, storage and peripheral devices are needed and how to connect them
- 2 identify any health and safety issues associated with setting up an IT system
- 3 connect up the components of an IT system safely, including a printer and other peripheral devices
- 4 connect removable storage media to a PC safely

### **Outcome 2 Connect to an IT communication service**

The learner can:

- 1 connect communication hardware safely to a PC
- 2 identify the details needed to connect to an Internet Service Provider (ISP)
- 3 connect to a communication service from a PC

### **Outcome 3 Set up software for use**

The learner can:

- 1 configure the user interface to meet needs
- 2 identify what security precautions need to be addressed when connecting to the internet
- 3 set up and configure virus protection software
- 4 set up files and software to meet needs

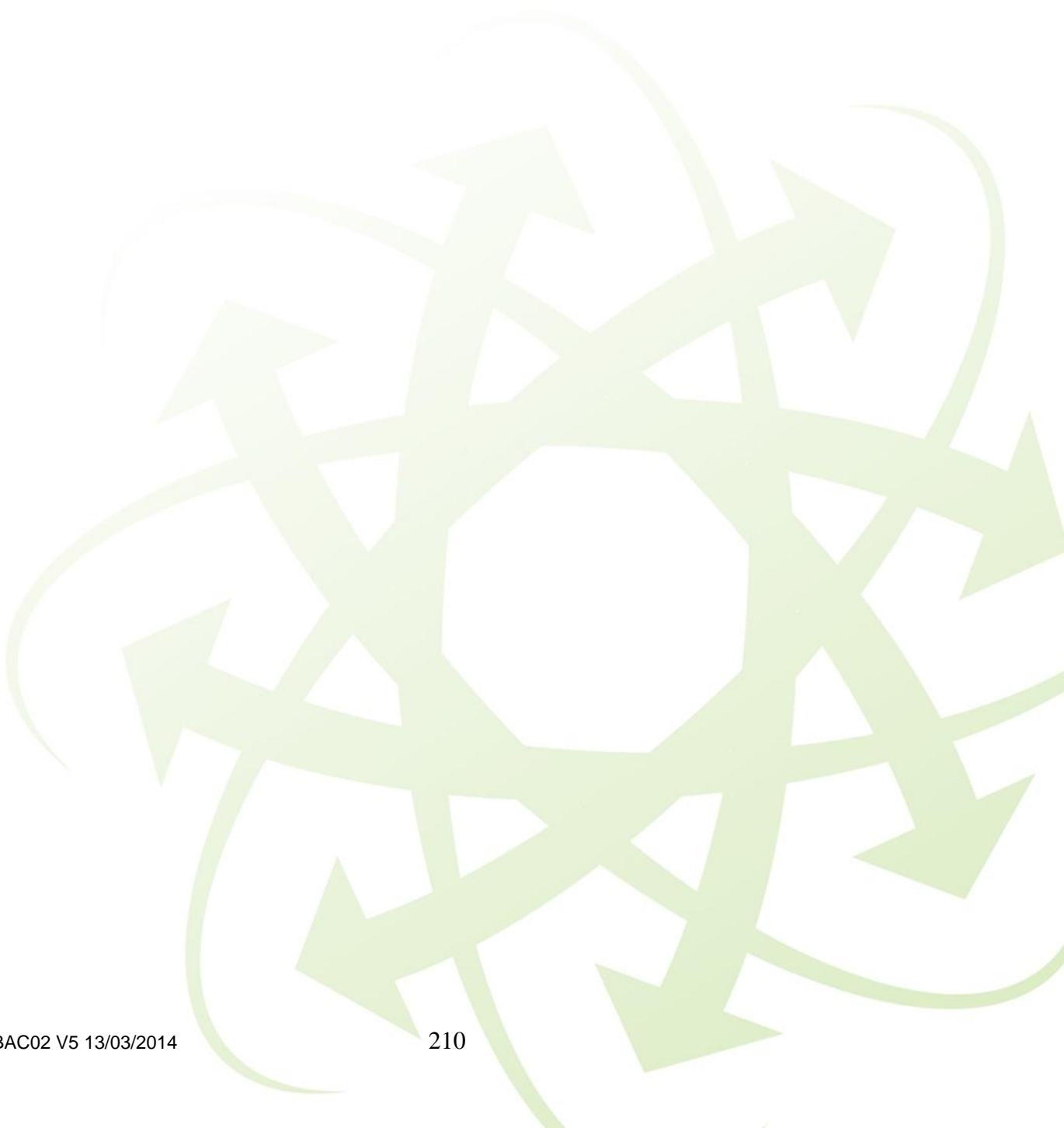
### **Outcome 4 Check that the IT system and communication service are working successfully**

The learner can:

- 1 identify simple tests that can be used to check the system
- 2 identify simple communication tests that can be used to check the internet connection
- 3 run tests to check that the system and communication service are working successfully
- 4 identify how to report faults and seek expert help
- 5 respond to error messages and report faults as appropriate

# IT108

## Spreadsheet software



## IT108 Spreadsheet software

Level: 1

Credit value: 3

### Unit aims

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. This unit is about the skills and knowledge required by an IT user 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 described 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.

### 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. This may be on a full-time or part-time basis.

### Details of the relationship between the unit and relevant national occupational standards (if appropriate)

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

### Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

## **IT108 Spreadsheet software**

Learning outcomes and assessment criteria

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

The learner can:

- 1 identify what numerical and other information is needed and how the spreadsheet should be structured to meet needs
- 2 enter and edit numerical and other data accurately
- 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**

The learner can:

- 1 identify how to summarise and display the required information
- 2 use functions and formulas to meet calculation requirements
- 3 use spreadsheet tools and techniques to summarise and display information

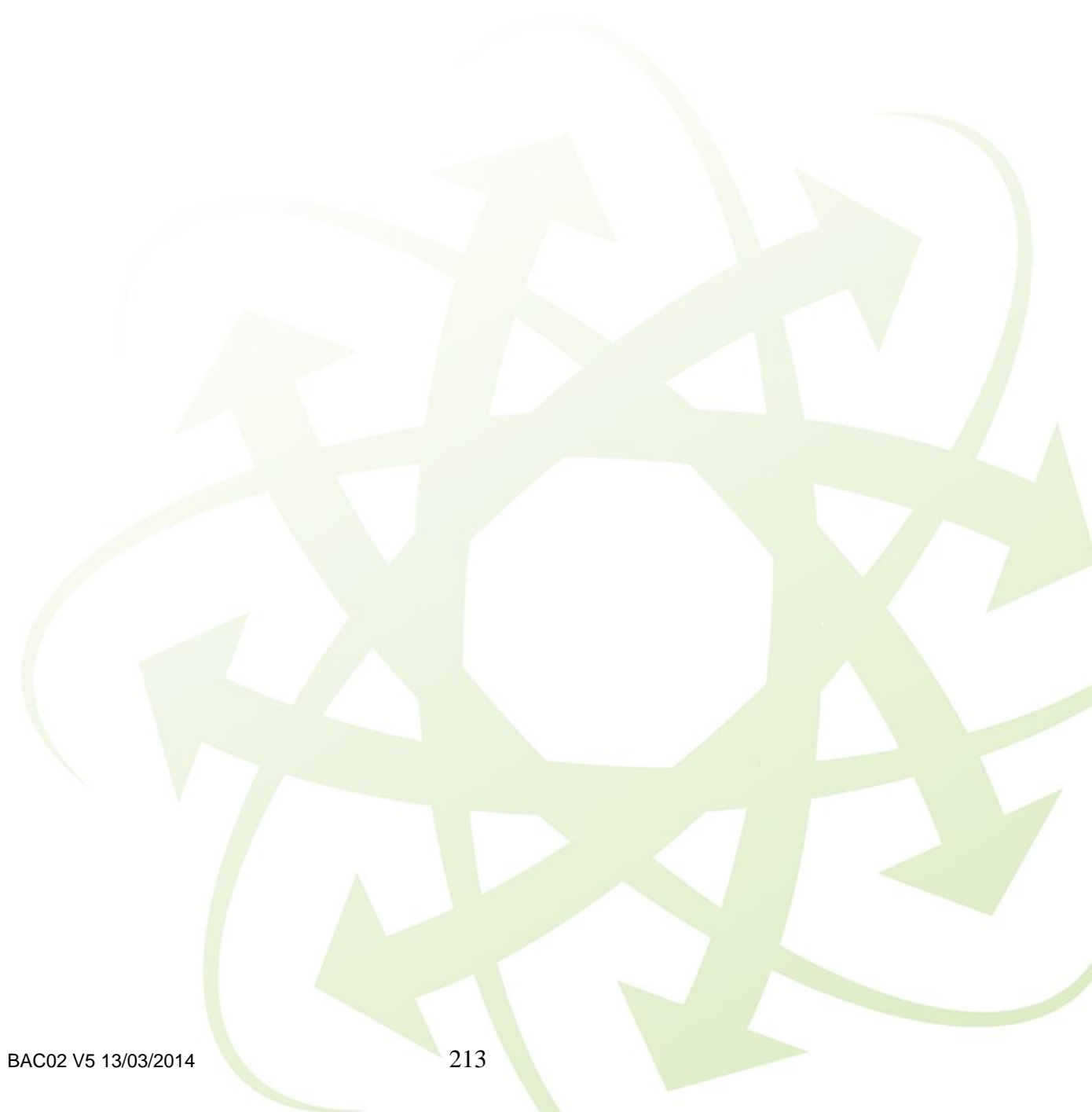
### **Outcome 3 Select and use appropriate tools and techniques to present spreadsheet information effectively**

The learner can:

- 1 select and use appropriate tools and techniques to format spreadsheet cells, rows and columns
- 2 identify which chart or graph type to use to display information
- 3 select and use appropriate tools and techniques to generate, develop and format charts and graphs
- 4 select and use appropriate page layout to present and print spreadsheet information
- 5 check information meets needs, using spreadsheet tools and making corrections as necessary

# IT109

## Using collaborative technologies



## IT109 Using collaborative technologies

Level: 1

Credit value: 3

### Unit aims

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.

This unit is about the skills and knowledge to safely use IT tools 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.

### 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. This may be on a full-time or part-time basis.

### Details of the relationship between the unit and relevant national occupational standards (if appropriate)

This unit is linked to the competences outlined in the IT User National Occupational Standards version 3 (2009).

### Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

## **IT109 Using collaborative technologies**

Learning outcomes and assessment criteria

### **Outcome 1 Stay safe and secure when using collaborative technology**

The learner can:

- 1 follow guidelines for working with collaborative technology
- 2 identify risks in using collaborative technology and why it is important to avoid them
- 3 carry out straightforward checks on others' online identities and different types of information
- 4 identify when and how to report online safety and security issues
- 5 identify what methods are used to promote trust

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

The learner can:

- 1 set up IT tools and devices that will enable you to contribute to collaborative work
- 2 identify the purpose for using collaborative technologies and expected outcomes
- 3 identify which collaborative technology tools and devices to use for different communication media
- 4 identify what terms and conditions apply to using collaborative technologies

### **Outcome 3 Prepare collaborative technologies for use**

The learner can:

- 1 use given details to access collaborative technologies needed for a collaborative task
- 2 adjust basic settings on collaborative technologies
- 3 change the environment of collaborative technologies
- 4 set up and use a data reader to feed information
- 5 identify what and why permissions are set to allow others to access information

### **Outcome 4 Contribute to tasks using collaborative technologies**

The learner can:

- 1 contribute responsibly and actively to collaborative working
- 2 contribute to producing and archiving the agreed outcome of collaborative working
- 3 identify when there is a problem with collaborative technologies and where to get help
- 4 respond to simple problems with collaborative technologies



# IT110

## Website software



Level: 1

Credit value: 3

### Unit aims

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

This unit is about the skills and knowledge required by an IT user to use basic website software tools and techniques appropriately to produce straightforward or routine single web pages from pre-set templates. Any aspect that is unfamiliar will require support and advice from others.

Website software tools and techniques will be described 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.

### 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. This may be on a full-time or part-time basis.

### Details of the relationship between the unit and relevant national occupational standards (if appropriate)

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

### Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

## **IT110 Website software**

Learning outcomes and assessment criteria

### **Outcome 1 Plan and create web pages**

The learner can:

- 1 identify what content and layout will be needed in the web page
- 2 identify the purpose of the webpage and intended audience
- 3 select and use a website design template to create a single web page
- 4 enter or insert content for web pages so that it is ready for editing and formatting
- 5 organise and combine information needed for web pages
- 6 identify copyright and other constraints on using others' information
- 7 identify what file types to use for saving content
- 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**

The learner can:

- 1 identify what editing and formatting to use to aid both clarity and navigation
- 2 select and use website features to help the user navigate simple websites
- 3 use appropriate editing and formatting techniques
- 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**

The learner can:

- 1 upload content to a website
- 2 respond appropriately to common problems when testing a web page

**IT111**

## Word processing software

## IT111 Word processing software

Level: 1

Credit value: 3

### Unit aims

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

This unit is about the skills and knowledge required by an IT User 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. This may be on a full-time or part-time basis.

### Details of the relationship between the unit and relevant national occupational standards (if appropriate)

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

### Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

## **IT111 Word processing software**

Learning outcomes and assessment criteria

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

The learner can:

- 1 identify what types of information are needed in documents
- 2 identify what templates are available and when to use them
- 3 use keyboard or other input method to enter or insert text and other information
- 4 combine information of different types or from different sources into a document
- 5 enter information into existing tables, forms and templates
- 6 use editing tools to amend document content
- 7 store and retrieve document files effectively, in line with local guidelines and conventions where available

### **Outcome 2 Structure information within word processing documents**

The learner can:

- 1 create and modify tables to organise tabular or numeric information
- 2 select and apply heading styles to text

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

The learner can:

- 1 identify what formatting to use to enhance presentation of the document
- 2 select and use appropriate techniques to format characters and paragraphs
- 3 select and use appropriate page layout to present and print documents
- 4 check documents meet needs, using IT tools and making corrections as necessary

# IT201

## Bespoke software 2



**Level: 2**

**Credit value: 3**

### **Unit aims**

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.

This unit is about the skills and knowledge needed by an IT User 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;
- 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. This may be on a full-time or part-time basis.

### **Details of the relationship between the unit and relevant national occupational standards (if appropriate)**

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.



## **IT201      Bespoke software 2**

Learning outcomes and assessment criteria

### **Outcome 1    Input and combine information using bespoke applications**

The learner can:

- 1    input relevant information accurately so that it is ready for processing
- 2    select and use appropriate techniques to link and combine information of different forms or from different sources within the software
- 3    respond appropriately to data entry error messages

### **Outcome 2    Use appropriate structures to organise and retrieve information efficiently**

The learner can:

- 1    describe what functions to apply to structure and layout information effectively
- 2    select and use appropriate structures and/or layouts to organise information
- 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**

The learner can:

- 1    select and use appropriate tools and techniques to edit, process and format information
- 2    check information meets needs, using IT tools and making corrections as necessary
- 3    select and use appropriate methods to present information

# IT202

## Data management software



**Level: 2**

**Credit value: 3**

### **Unit aims**

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. Data management software is often implemented on relational database systems by providing predefined file and record structures, processes, reports and data-entry screens. This is about the use of these predefined objects. This unit is about the skills and knowledge required by an IT user to select and use intermediate data management software tools and techniques to:

- enter information into data management systems that are 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.

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

### **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. This may be on a full-time or part-time basis.

### **Details of the relationship between the unit and relevant national occupational standards (if appropriate)**

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

## **IT202      Data management software**

Learning outcomes and assessment criteria

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

The learner can:

- 1 describe the risks to data security and procedures used for data protection
- 2 enter data accurately into groups of records to meet requirements
- 3 locate and amend data associated with groups of records
- 4 check data records meet needs, using IT tools and making corrections as necessary
- 5 respond appropriately to data entry and other error messages
- 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**

The learner can:

- 1 identify what queries and reports need to be run to output the required information
- 2 select and use queries to search for and retrieve information to meet given requirements
- 3 create and view reports to output information from the system to meet given requirements

# IT203

## Database software



**Level: 2**

**Credit value: 4**

### **Unit aims**

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

This unit is about the skills and knowledge required by an IT user to 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.

### **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. This may be on a full-time or part-time basis.

### **Details of the relationship between the unit and relevant national occupational standards (if appropriate)**

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

## **IT203 Database software**

Learning outcomes and assessment criteria

### **Outcome 1 Create and modify non-relational database tables**

The learner can:

- 1 identify the components of a database design
- 2 describe the field characteristics for the data required
- 3 create and modify database tables using a range of field types
- 4 describe ways to maintain data integrity
- 5 respond appropriately to problems with database tables
- 6 use database tools and techniques to ensure data integrity is maintained

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

The learner can:

- 1 create forms to enter, edit and organise data in a database
- 2 select and use appropriate tools and techniques to format data entry forms
- 3 check data entry meets needs, using IT tools and making corrections as necessary
- 4 respond appropriately to data entry errors

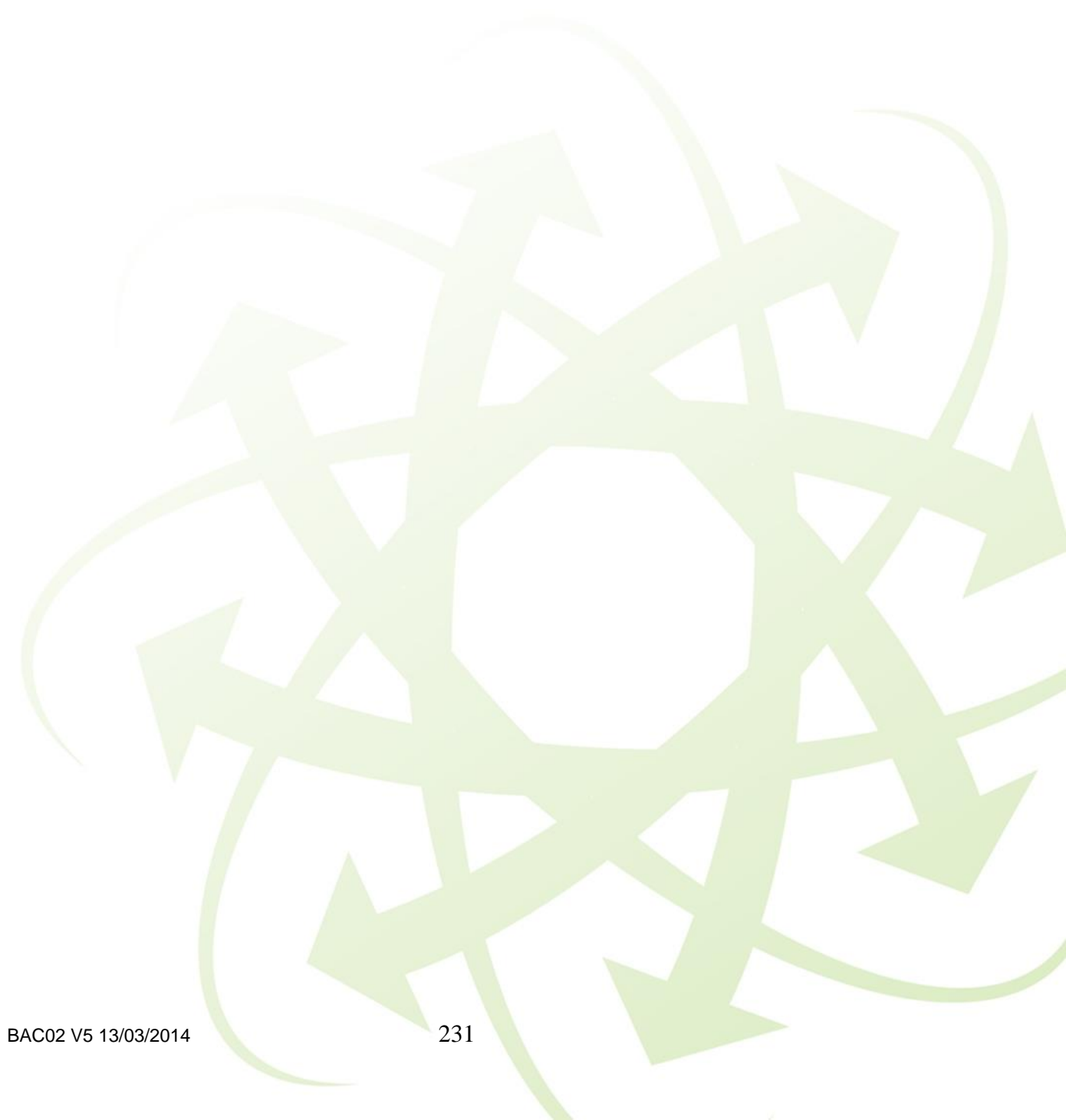
### **Outcome 3 Use database software tools to run queries and produce reports**

The learner can:

- 1 create and run database queries using multiple criteria to display or amend selected data
- 2 plan and produce database reports from a single table non-relational database
- 3 select and use appropriate tools and techniques to format database reports
- 4 check reports meet needs, using IT tools and making corrections as necessary

# IT204

## Improving productivity using IT





## IT204 Improving productivity using IT

**Level: 2**

**Credit value: 4**

### Unit aims

The use of IT tools and systems can improve the productivity and efficiency of work activities in a variety of contexts.

This unit is about the skills and knowledge needed by the IT User 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 identify and use automated methods or alternative ways of working to improve productivity.

An activity will typically be 'non-routine or unfamiliar' because:

- the task or context is likely to require some preparation, clarification or research (to separate the components and to identify what factors need to be considered, for example, time available, audience needs, accessibility of source, types of content, message and meaning) before an approach can be planned; and
- the techniques required will involve a number of steps and at times be non-routine or unfamiliar

### 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. This may be on a full-time or part-time basis.

### Details of the relationship between the unit and relevant national occupational standards (if appropriate)

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

### Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

## **IT204      Improving productivity using IT**

Learning outcomes and assessment criteria

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

The learner can:

- 1 describe the purpose for using IT
- 2 describe the methods, skills and resources required to complete the task successfully
- 3 plan how to carry out tasks using IT to achieve the required purpose and outcome
- 4 describe any factors that may affect the task
- 5 select and use IT systems and software applications to complete planned tasks and produce effective outcomes
- 6 describe how the purpose and outcomes have been met by the chosen IT systems and software applications
- 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**

The learner can:

- 1 review ongoing use of IT tools and techniques and change the approach as needed
- 2 describe whether the IT tools selected were appropriate for the task and purpose
- 3 assess strengths and weaknesses of final work
- 4 describe ways to make further improvements to work
- 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**

The learner can:

- 1 review the benefits and drawbacks of IT tools and systems used, in terms of productivity and efficiency
- 2 describe ways to improve productivity and efficiency
- 3 develop solutions to improve own productivity in using IT
- 4 test solutions to ensure that they work as intended

# IT205

## IT security for users



## IT205 IT security for users

Level: 2

Credit value: 2

### Unit aims

This is the ability to protect hardware, software and the data within an IT system against theft, malfunction and unauthorised access.

This unit is about the skills and knowledge needed by the IT User 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).

### Learning outcomes

There is **one** learning outcomes 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. This may be on a full-time or part-time basis.

### Details of the relationship between the unit and relevant national occupational standards (if appropriate)

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

### Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

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

The learner can:

- 1 describe the security issues that may threaten system performance
- 2 apply a range of security precautions to protect IT systems and data
- 3 describe the threats to system and information security and integrity
- 4 keep information secure and manage personal access to information sources securely
- 5 describe ways to protect hardware, software and data and minimise security risk
- 6 apply guidelines and procedures for the secure use of IT
- 7 describe why it is important to backup data and how to do so securely
- 8 select and use effective backup procedures for systems and data

# IT206

## Presentation software



**Level: 2**

**Credit value: 4**

### **Unit aims**

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.

This unit is about the skills and knowledge required by an IT user 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 at this level 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.

### **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 **30** 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 (if appropriate)**

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

### **Endorsement of the unit by a sector or other appropriate body**

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### **Unit assessment**

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

## **IT206      Presentation software**

Learning outcomes and assessment criteria

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

The learner can:

- 1    identify what types of information are required for the presentation
- 2    enter text and other information using layouts appropriate to type of information
- 3    insert charts and tables into presentation slides
- 4    insert images, video or sound to enhance the presentation
- 5    identify any constraints which may affect the presentation
- 6    organise and combine information of different forms or from different sources for presentations
- 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**

The learner can:

- 1    identify what slide structure and themes to use
- 2    select, change and use appropriate templates for slides
- 3    select and use appropriate techniques to edit slides and presentations to meet needs
- 4    select and use appropriate techniques to format slides and presentations
- 5    identify what presentation effects to use to enhance the presentation
- 6    select and use animation and transition effects appropriately to enhance slide sequences

### **Outcome 3    Prepare slideshow for presentation**

The learner can:

- 1    describe how to present slides to meet needs and communicate effectively
- 2    prepare slideshow for presentation
- 3    check presentation meets needs, using IT tools and making corrections as necessary
- 4    identify and respond to any quality problems with presentations to ensure that presentations meet needs



# IT207

## Set up an IT system



## IT207 Set up an IT system

Level: 2

Credit value: 4

### Unit aims

This is 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.

This unit is about the skills and knowledge to 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

### 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. This may be on a full-time or part-time basis.

### Details of the relationship between the unit and relevant national occupational standards (if appropriate)

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

### Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

## **IT207 Set up an IT system**

Learning outcomes and assessment criteria

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

The learner can:

- 1 describe what IT system components, storage and peripheral devices are needed
- 2 describe any health and safety issues associated with setting up an IT system
- 3 describe the characteristics of IT systems that affect performance
- 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**

The learner can:

- 1 select and connect communication hardware safely to an IT system
- 2 describe the factors that affect data transfer
- 3 select and connect to a communication service from an IT system
- 4 identify the login and password details needed to connect to an Internet Service Provider (ISP)

### **Outcome 3 Install and configure software for use**

The learner can:

- 1 configure the user interface to meet needs
- 2 describe what security precautions need to be addressed
- 3 set up and configure virus protection software
- 4 install and set up application software to meet needs
- 5 backup and restore system and data files

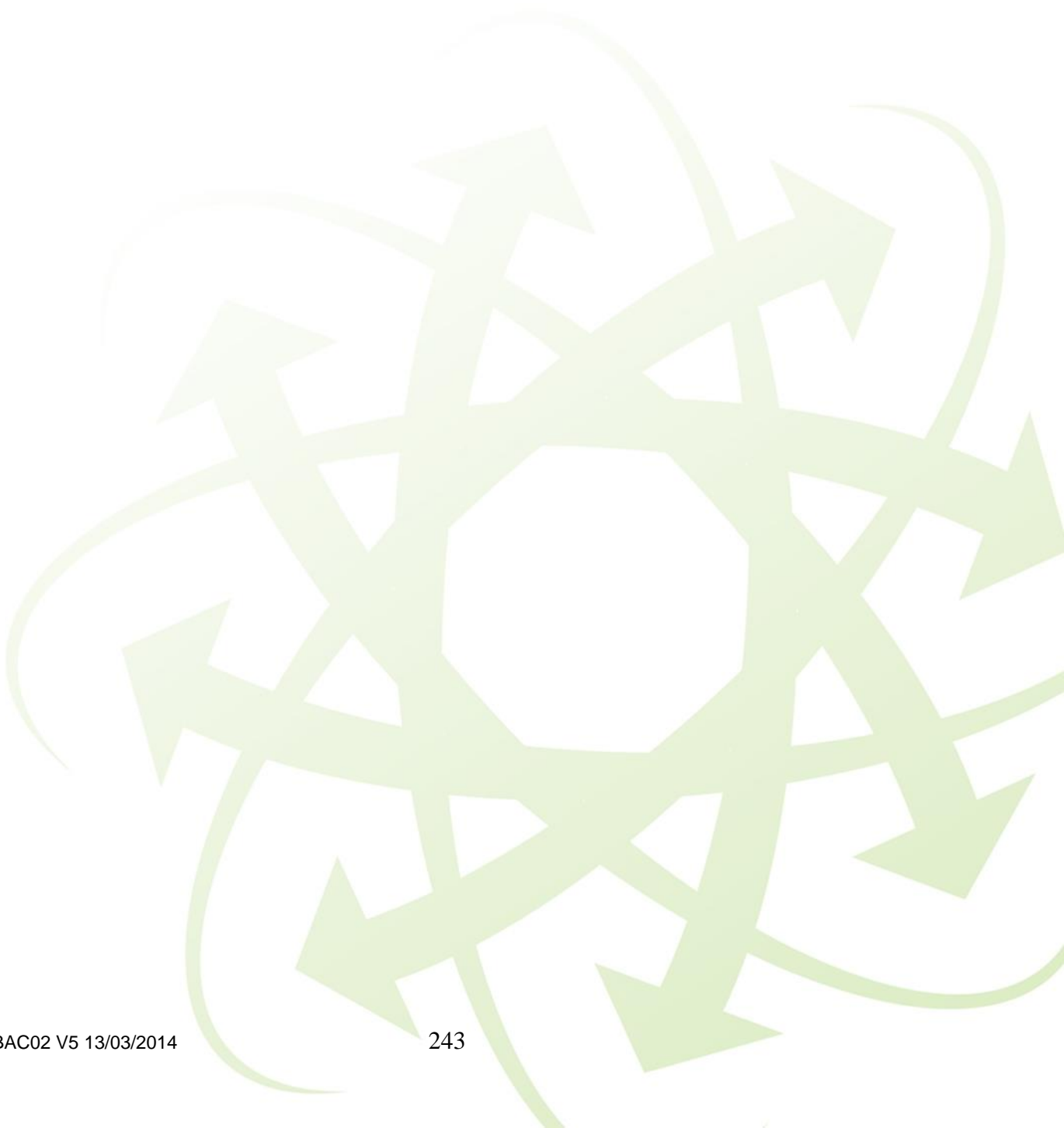
### **Outcome 4 Check that the IT system and communication service are working successfully**

The learner can:

- 1 identify what tests can be used to check the IT system and communications
- 2 select and run suitable tests to make sure that the system and communication service are working successfully
- 3 identify the help and troubleshooting facilities available to solve problems
- 4 respond to faults and error messages and use help and troubleshooting facilities to determine and take appropriate action

# IT208

## Spreadsheet software



Level: 2

Credit value: 4

### Unit aims

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. This level is about the skills and knowledge required by an IT user 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. Any aspect that is unfamiliar may require support and advice from others.

Spreadsheet software tools and techniques will be described 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

### 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. This may be on a full-time or part-time basis.

### Details of the relationship between the unit and relevant national occupational standards (if appropriate)

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

### Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

## **IT208 Spreadsheet software**

Learning outcomes and assessment criteria

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

The learner can:

- 1 identify what numerical and other information is needed in the spreadsheet and how it should be structured
- 2 enter and edit numerical and other data accurately
- 3 combine and link data across worksheets
- 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**

The learner can:

- 1 identify which tools and techniques to use to analyse and manipulate data to meet requirements
- 2 select and use a range of appropriate functions and formulas to meet calculation requirements
- 3 use a range of tools and techniques to analyse and manipulate data to meet requirements

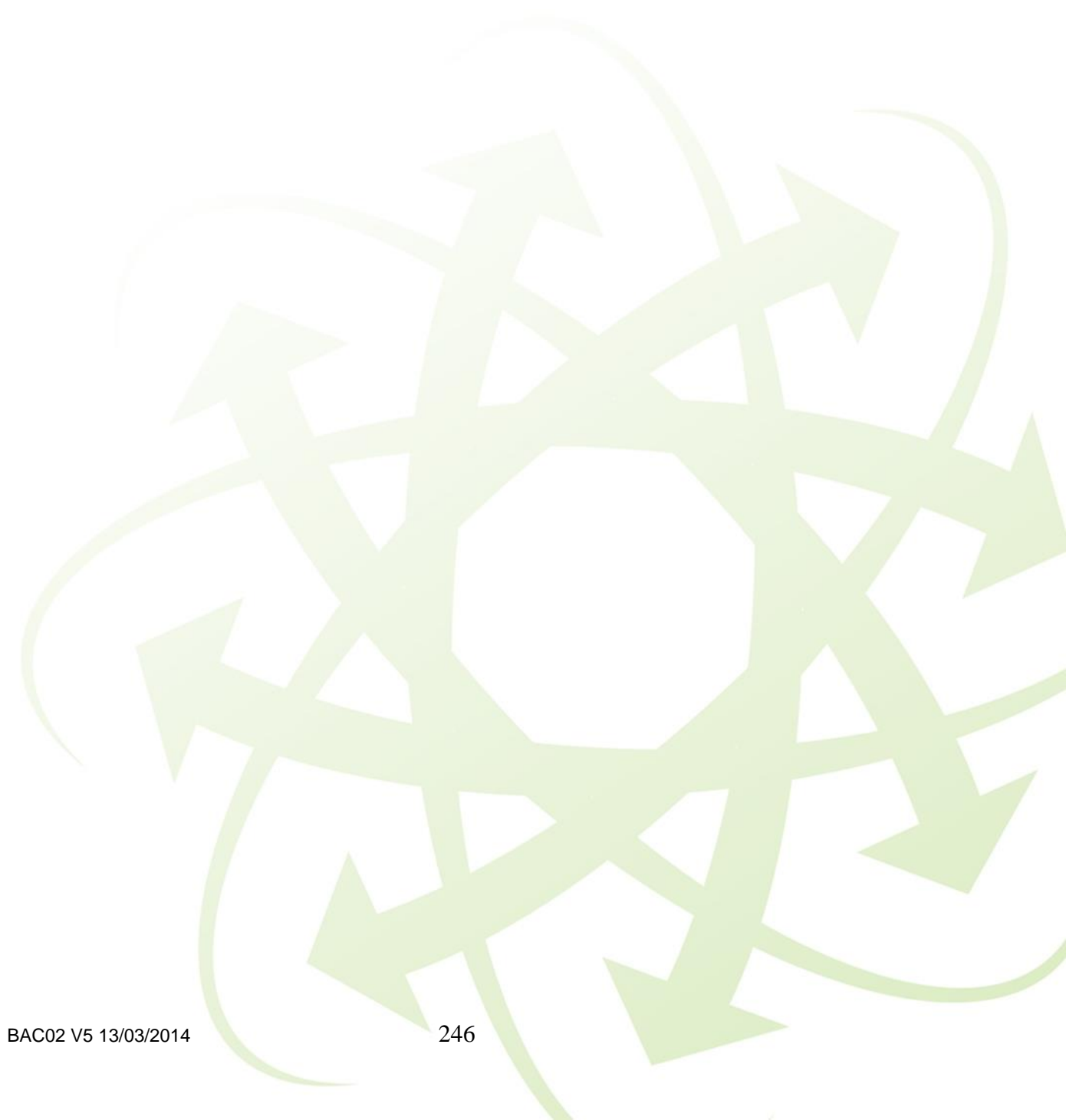
### **Outcome 3 Select and use tools and techniques to present and format spreadsheet information**

The learner can:

- 1 plan how to present and format spreadsheet information effectively to meet needs
- 2 select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets
- 3 select and format an appropriate chart or graph type to display selected information
- 4 select and use appropriate page layout to present and print spreadsheet information
- 5 check information meets needs, using spreadsheet tools and making corrections as necessary
- 6 describe how to find errors in spreadsheet formulas
- 7 respond appropriately to any problems with spreadsheets

# IT209

## Using collaborative technologies



## IT209 Using collaborative technologies

Level: 2

Credit value: 4

### Unit aims

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.

This unit is about the skills and knowledge to facilitate the use of appropriate combinations of IT tools 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.

### 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. This may be on a full-time or part-time basis.

### Details of the relationship between the unit and relevant national occupational standards (if appropriate)

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

### Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.



## **IT209 Using collaborative technologies**

Learning outcomes and assessment criteria

### **Outcome 1 Stay safe and secure when working with collaborative technology**

The learner can:

- 1 take appropriate steps to avoid risks when working with collaborative technology, in line with relevant guidelines
- 2 explain what risks there may be in using collaborative technology and how to keep them to a minimum
- 3 use appropriate methods to promote trust when working collaboratively
- 4 carry out appropriate checks on others' online identities and different types of information
- 5 identify and respond to inappropriate content and behaviour

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

The learner can:

- 1 describe the purposes for using collaborative technologies
- 2 describe what outcomes are needed from collaborative working and whether or not archiving is required
- 3 describe the roles, IT tools and facilities needed for collaborative tasks and communication media
- 4 describe the features, benefits and limitations of different collaborative technology tools and devices
- 5 describe the compatibility issues in different combinations of collaborative tools and devices
- 6 select an appropriate combination of IT tools and devices to carry out collaborative tasks
- 7 connect and configure the combination of IT tools and devices needed for a collaborative task

### **Outcome 3 Prepare collaborative technologies for use**

The learner can:

- 1 describe what access rights and issues others may have in using collaborative technologies
- 2 assess what permissions are needed for different users and content
- 3 set up and use access rights to enable others to access information
- 4 set up and use permissions to filter information
- 5 adjust settings so that others can access IT tools and devices for collaborative working
- 6 select and use different elements to control environments for collaborative technologies
- 7 select and join networks and data feeds to manage data to suit collaborative tasks

### **Outcome 4 Contribute to tasks using collaborative technologies**

The learner can:

- 1 describe rules of engagement for using collaborative technologies
- 2 enable others to contribute responsibly to collaborative tasks
- 3 present relevant and valuable information
- 4 moderate the use of collaborative technologies
- 5 archive the outcome of collaborative working
- 6 assess when there is a problem with collaborative technologies and when to get expert help
- 7 respond to problems with collaborative technologies

# IT210

## Website software



Level: 2

Credit value: 4

### Unit aims

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

This unit is about the skills and knowledge required by an IT user to select and use a wide range of intermediate website software tools and techniques to produce multiple-page websites. Any aspect that is unfamiliar may require support and advice from others.

Website software tools and techniques will be described 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.

### 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. This may be on a full-time or part-time basis.

### Details of the relationship between the unit and relevant national occupational standards (if appropriate)

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

### Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

## **IT210 Website software**

Learning outcomes and assessment criteria

### **Outcome 1 Create structures and styles for websites**

The learner can:

- 1 describe what website content and layout will be needed for each page
- 2 plan and create web page templates to layout
- 3 select and use website features and structures to help the user navigate round web pages within the site
- 4 create, select and use styles to keep the appearance of web pages consistent and make them easy to understand
- 5 describe how copyright and other constraints may affect the website
- 6 describe what access issues may need to be taken into account
- 7 describe what file types to use for saving content
- 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**

The learner can:

- 1 prepare content for web pages so that it is ready for editing and formatting
- 2 organise and combine information needed for web pages including across different software
- 3 select and use appropriate editing and formatting techniques to aid both clarity and navigation
- 4 select and use appropriate development techniques to link information across pages
- 5 change the file formats appropriately for content
- 6 check web pages meet needs, using IT tools and making corrections as necessary

### **Outcome 3 Publish websites**

The learner can:

- 1 select and use appropriate testing methods to check that all elements of websites are working as planned
- 2 identify any quality problems with websites and how to respond to them
- 3 select and use an appropriate programme to upload and publish the website
- 4 respond appropriately to problems with multiple page websites

# IT211

## Word processing software



## IT211 Word processing software

Level: 2

Credit value: 4

### Unit aims

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

This unit is about the skills and knowledge required by an IT user 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.

### 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. This may be on a full-time or part-time basis.

### Details of the relationship between the unit and relevant national occupational standards (if appropriate)

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

### Endorsement of the unit by a sector or other appropriate body

This unit is endorsed by Council for Administration (CfA), the sector skills council for business and administration.

### Unit assessment

Learners will be required to provide a portfolio of evidence indicating that they have met all the unit outcomes and assessment criteria.

## **IT211 Website software**

Learning outcomes and assessment criteria

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

The learner can:

- 1 identify what types of information are needed in documents
- 2 use appropriate techniques to enter text and other information accurately and efficiently
- 3 select and use appropriate templates for different purposes
- 4 identify when and how to combine and merge information from other software or other documents
- 5 select and use a range of editing tools to amend document content
- 6 combine or merge information within a document from a range of sources
- 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**

The learner can:

- 1 identify the document requirements for structure and style
- 2 identify what templates and styles are available and when to use them
- 3 create and modify columns, tables and forms to organise information
- 4 select and apply styles to text

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

The learner can:

- 1 identify how the document should be formatted to aid meaning
- 2 select and use appropriate techniques to format characters and paragraphs
- 3 select and use appropriate page and section layouts to present and print documents
- 4 describe any quality problems with documents
- 5 check documents meet needs, using IT tools and making corrections as necessary
- 6 respond appropriately to quality problems with documents so that outcomes meet needs



Published by:

Skillsfirst Awards Limited  
Suite 215  
Fort Dunlop  
Fort Parkway  
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B24 9FD

Tel - 0121 270 5100  
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Website – [www.skillsfirst.co.uk](http://www.skillsfirst.co.uk)