Unit Title:	**Use digital technologies to manage emails**
OCR unit number:	6
Level:	Level 1
Guided learning hours:	10
Unit reference number:	Y/507/2762

Unit aim and purpose

Emails are vital in today's workplace, allowing people to share and communicate information with one another. For any company to do well, people need to be able to communicate, so it is important that you can work with emails. You will be able to complete this unit using software on different digital devices such as PCs, laptops, tablets etc. This unit will help you prepare for employment in a role that requires working with emails. You will learn how to manage your emails and contacts including using out of office and signatures, as well as attaching documents to emails.

Learning Outcomes The Learner will:	Assessment Criteria The Learner can:	Teaching Content
1. Be able to manage email contacts	1.1 create contacts with email addresses	• Create contacts with email addresses: - create new contact(s) - enter information into fields (eg name, company, job title, email address, phone number, picture). - options (categories, private)
	1.2 edit contacts	• Edit contacts: - delete information - edit information
	1.3 create distribution lists of contacts	• Create distribution lists of contacts: - create new distribution list - name distribution list - add contacts to distribution list - remove contacts from distribution list
2. Be able to create emails to complete routine tasks	2.1 create emails using email addresses	• Create emails using email addresses: - enter email address(es) with @ symbol (accurate to avoid

Learning Outcomes The Learner will:	Assessment Criteria The Learner can:	Teaching Content
		- bounce back messages) - use cc, <u>bcc</u> - enter subject line - enter email content <u>including hyperlinks to information</u> - <u>categories of importance</u> - <u>read receipts</u> - <u>create auto signature with given text</u>
	2.2 create emails using contacts and distribution lists	• Create emails using contacts and distribution lists: - select contacts <u>and distribution lists</u>
3. Be able to respond to given emails	3.1 Reply to/forward emails	• Reply to/forward emails: - reply, reply to all, forward - add information - include/do not include attachments - <u>delete extra/unneeded content</u>
	3.2 attach files and folders to emails	• Attach files and folders to emails: - select files to attach - <u>prepare and select folders to attach (eg by compressing)</u>
4. Be able to manage emails	4.1 organise emails	• Organise emails: - sort criteria (e.g. to, from, date, attachment, <u>subject</u>) - <u>flagging and tick boxing</u> - use deleted items folder - <u>use key words to find emails</u> -
	4.2 create email folders	• Create email folders: - <u>name folders</u> - <u>edit folders</u>
	4.3 move files into email folders	• Move files into email folders: - <u>move files</u>

Delivery guidance

You could deliver the teaching for Entry Level 3 and Level 1 units at the same time. To help you we have underlined text in the Level 1 unit to identify the increased breadth and depth of teaching.

Be able to manage email contacts

Learners should be taught the importance of setting up contacts and understanding when this action is needed instead of simply typing the email address every time you need to send an email. Learners should be encouraged to look at different types of devices and technology available and understand that contact lists can be presented in a variety of different ways. They should be able to create a contact and include basic field names such as email address, phone number and uploading a picture. Learners should also be taught about contact options, such as different categories and being able to set contacts as private for their viewing only. As well as creating contacts learners will be expected to go back and edit information such as adding a second email address or adding additional information. In addition learners will be expected to create distribution lists which will involve the naming of the list and adding and removing contacts.

Be able to create emails to complete routine tasks

Learners should be taught the importance of how to create emails from scratch. Learners need to be able to practice both typing an individual email address in and selecting stored contacts or a distribution list from those created above. Learners need to be taught about the need for accuracy when typing in an email address as it can make a difference between the email getting through to the intended recipient or bouncing back. They need to know the importance of writing simple subject lines that are relevant to the content of the unit, that are easily understood by the recipient and could be sorted in an effective manner so the email could be found again if it was needed in the future. Learners need to practice creating emails with hyperlinks, be able to set categories of importance and add read receipts so they know that their email has been read by the recipient. They need to be taught how to add auto signatures to their emails using given text.

Be able to respond to given emails

Learners need to be taught how to reply and forward emails and the difference between the two approaches – i.e. when an email is <u>forwarded</u> any attached documents are sent with it which does not happen when emails are <u>replied</u> to. Often there is email exchange in a company where it is not always appropriate for the final recipient to be party to all of the previous conversations. Learners therefore need to follow instructions to delete unneeded email content prior to an email being sent. Learners need to be able to send multiple messages to people using cc and bcc. They must also be able to attach given files to emails and compress folders (if the software requires this). It would be useful if learners could be given lots of opportunities to practice these skills in real scenarios to build their confidence as they will be using email on a regular basis in the workplace.

Be able to manage emails

It is likely that learners will have a number of emails in their inbox that need sorting. They must be given the opportunity to practice sorting by different criteria such as received by, date and subject in order to locate an email. Learners must practice finding emails through using key word searches and should be aware that it is possible to sort emails by additional flagging and tick boxing techniques. At other times there will be the need to delete emails or retrieve emails that have been deleted in error. Learners need to know how to retrieve these emails from the deleted folder. They need to be taught how to create folders to store their emails, how to edit these folders and move emails into them.