

**Unit Title:** Principles of managing information and producing documents in a business environment

OCR unit number 303

Sector unit number TC3-3

Level: 3

Credit value: 4

Guided learning hours: 32

## Unit purpose and aim

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This unit is about knowing and understanding how to manage information and design and produce documents securely when working in a business environment.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<p><b>The Learner will:</b></p> <p>1 Understand how to design and monitor information systems</p>	<p><b>The Learner can:</b></p> <p>1.1 Describe the types of information that need to be managed in a business environment</p> <p>1.2 Describe ways of contributing to the design and development of an information system</p>	<p>1.1 Types of information that need to be managed in a business environment such as:</p> <ul style="list-style-type: none"> <li>• Communications</li> <li>• Internal documentation</li> <li>• Supplier information</li> <li>• Policies and procedures</li> <li>• Databases</li> <li>• Staff and/or customer records</li> </ul> <p>1.2 ways of contributing to the design and development of an information system include:</p> <ul style="list-style-type: none"> <li>• Providing information on the type of information that will be used and its purpose</li> <li>• Providing information on how accessible the information needs to be</li> <li>• Using the information system and giving feedback</li> </ul>

	<p>1.3 Explain the purpose and benefits of monitoring the use of an information system and ways of doing so</p>	<p>1.3 For example, the purpose and benefits of monitoring the use of an information system may include:</p> <ul style="list-style-type: none"> <li>• To ensure the information system is fit for purpose</li> <li>• To ensure improvements can be carried out if and when required</li> <li>• To ensure that the system is being used in the correct way</li> </ul>
<p>2 Understand how to research information</p>	<p>2.1 Explain the purpose of agreeing objectives and deadlines for researching information</p> <p>2.2 Explain how to identify and select sources of information</p> <p>2.3 Identify methods of checking information for reliability and accuracy</p> <p>2.4 Identify restrictions that apply to the use of researched information</p>	<p>2.1 For example the purpose of agreeing objectives and deadlines for researching information is to ensure accurate and timely information is provided.</p> <p>2.2 For example information may be selected according to:</p> <ul style="list-style-type: none"> <li>• Relevance</li> <li>• Availability</li> <li>• Accessibility</li> </ul> <p>Sources of information could include:</p> <ul style="list-style-type: none"> <li>• Internet search facilities</li> <li>• Libraries</li> <li>• Databases</li> </ul> <p>2.3 Methods of checking information for reliability and accuracy may include::</p> <ul style="list-style-type: none"> <li>• Ensuring the information is updated regularly</li> <li>• Gathering a wide range of information and making comparisons</li> <li>• Checking and recording the source of the information</li> </ul> <p>2.4 For example:</p> <ul style="list-style-type: none"> <li>• Data protection</li> <li>• Copyright</li> <li>• Plagiarism</li> </ul>

<p>3 Understand how to organise, report and evaluate the relevance of information</p>	<p>3.1 Explain different ways of organising and reporting information</p> <p>3.2 Explain how to evaluate the relevance of information</p>	<p>3.1 Ways of organising and reporting information include:</p> <ul style="list-style-type: none"> <li>• Reports</li> <li>• Tables, graphs, pie charts</li> <li>• Presentations</li> </ul> <p>3.2 For example:</p> <ul style="list-style-type: none"> <li>• Does the information aid the decision making process?</li> <li>• Is it accurate?</li> </ul>
<p>4 Understand how to store information</p>	<p>4.1 Explain different ways of storing information and the purpose of doing so</p> <p>4.2 Compare different information storage and archive systems and their main features</p>	<p>4.1 Ways of storing information include methods such as Databases</p> <ul style="list-style-type: none"> <li>• Spreadsheets</li> <li>• Manual filing systems</li> <li>• Password protected electronic files</li> </ul> <p>The purpose of doing so might be to ensure information is accessible to the relevant people it can be stored in the following ways:</p> <p>4.2 For example:</p> <p>Electronic filing systems:</p> <ul style="list-style-type: none"> <li>• store large quantities of information in different formats</li> <li>• allow specific data to be extracted easily</li> <li>• secured through the use of passwords</li> <li>• can lose data if files are corrupted</li> </ul> <p>Manual filing systems:</p> <ul style="list-style-type: none"> <li>• allow storage of hard copy information so can provide instant access</li> <li>• Easy to use</li> <li>• access is harder to control</li> </ul>
<p>5 Understand how to design and produce documents</p>	<p>5.1 Identify reasons for designing and producing high quality and attractive documents</p>	<p>5.1 reasons for designing and producing high quality and attractive documents may include:</p> <ul style="list-style-type: none"> <li>• To ensure a</li> </ul>

	<p>5.2 Compare different types and styles of documents that may be designed and produced and ways of doing so</p> <p>5.3 Describe reasons for agreeing the purpose, content, layout, style, quality standards and deadlines for the design and production of documents</p> <p>5.4 Describe ways of researching, organising and checking content needed for documents</p>	<p>professional standard at all times</p> <ul style="list-style-type: none"> <li>• To appeal to potential customers</li> </ul> <p>5.2 Different types and styles of documents that may be designed include:</p> <ul style="list-style-type: none"> <li>• Reports using a variety of software to produce, charts and images</li> <li>• Presentations using power point slides</li> <li>• Marketing materials for flyers and posters using design software packages</li> </ul> <p>5.3 For example reasons include to ensure the end product is fit for purpose, delivered on time and meets the correct company standard.</p> <p>5.4 Ways of researching, organising and checking content needed for documents includes:</p> <ul style="list-style-type: none"> <li>• Checking who the document is for and what is its purpose</li> <li>• Organising Information according to relevance</li> </ul>
<p>6 Understand how to maintain security and confidentiality in a business environment</p>	<p>6.1 Explain the purpose of maintaining security and confidentiality in a business environment</p> <p>6.2 Describe ways of maintaining security and confidentiality in a business environment</p>	<p>6.1 For example, the purpose of maintaining security and confidentiality in a business environment includes:</p> <ul style="list-style-type: none"> <li>• to ensure data protection laws are followed</li> <li>• To ensure company procedures are followed</li> </ul> <p>6.1 For example, ways of maintaining security and confidentiality in a business environment includes:</p> <ul style="list-style-type: none"> <li>• Ensuring information is stored and filed correctly using password protection if</li> </ul>

		<p>necessary</p> <ul style="list-style-type: none"><li>• Ensuring documentation is not left lying around</li><li>• Following the correct procedures for visitors</li><li>• Reporting anything suspicious</li><li>• Ensuring the right level of security is applied</li></ul>
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## Assessment

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Assessment will consist of an on-line multiple-choice test. All tests are available on demand.

The test for this unit will be 45 minutes in length and consist of 30 questions. Results will be graded pass or fail.

The grade achieved will be stated on the certificate.

## Guidance on assessment and evidence requirements

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This unit is assessed via an on demand on-screen multiple-choice test, set and marked by OCR.

Each test will consist of multiple-choice questions which will test candidates' knowledge and understanding across the Learning Outcomes and associated Assessment Criteria. Candidates will be required to have knowledge and understanding of all Assessment Criteria within the unit, as all Assessment Criteria will be covered within any one test.

A number of multiple-choice question types may be used. These could include: closed questions; statements for completion; multiple response questions; true/false questions or ordering questions (including a maximum of 4 steps).

(Please refer to the *Principles of Business and Administration Centre Handbook* for further guidance regarding each type of question).

Centres should refer to the '*OCR Administrative Guide to Vocational Qualifications (A850)*' for Notes on Preventing Computer-Assisted Malpractice.

## National Occupational Standards (NOS) mapping/signposting

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NOS can viewed on the relevant Sector Skills Council's website or the Occupational standards directory at [www.ukstandards.co.uk](http://www.ukstandards.co.uk).

Occupational standards	Unit number	Title
Business and Administration NOS	307	Monitor Information systems
Business and Administration NOS	310	Research, analyse and report information

## Functional skills signposting

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This section indicates where candidates may have an opportunity to develop their functional skills.

Link to functional skills standards <http://www.qcda.gov.uk/15565.aspx>

Functional Skills Standards					
English		Mathematics		ICT	
Speaking, listening and communication	✓	Representing		Use ICT systems	✓
Reading	✓	Analysing		Find and select information	✓
Writing	✓	Interpreting		Develop, present and communicate information	

## Resources

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Equipment: In order to deliver the on-line test for this unit, centres will require the minimum hardware stipulated in the OCR document *Minimum Hardware Requirements*. This document is available for downloading from the E-assessment area of the *Business and Administration* website ([www.ocr.org.uk](http://www.ocr.org.uk)).

OCR does not stipulate the mode of delivery for the teaching of the content of this unit. Centres are free to deliver this unit using any mode of delivery that meets the needs of their candidates. Centres should consider the candidates' complete learning experience when designing learning programmes.

## Additional information

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The *OCR Business and Administration Centre Handbook* contains important information for anyone delivering, working towards or involved with the OCR Business and Administration qualifications, of which this unit forms a part. This can be downloaded from OCR's website [www.ocr.org.uk](http://www.ocr.org.uk).

For further information regarding administration for this qualification, please refer to the OCR document '*Admin Guide: Vocational Qualifications*' (A850) on the OCR website [www.ocr.org.uk](http://www.ocr.org.uk) the OCR website [www.ocr.org.uk](http://www.ocr.org.uk) .