

Unit Title: Principles of managing information and producing documents

OCR unit number 203

Sector unit number TC2-3

Level: 2

Credit value: 3

Guided learning hours: 24

Unit purpose and aim

This unit is about the knowledge needed to manage information and produce documents, including, organising and researching information, and producing and storing documents.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<p>The Learner will:</p> <p>1 Understand the purpose of information technology in a business environment</p>	<p>The Learner can:</p> <p>1.1 Identify different types of information technology that may be used for work tasks</p> <p>1.2 Outline the benefits of using information technology for work tasks</p>	<p>1.1 different types of information technology that may be used for work tasks includes:</p> <ul style="list-style-type: none"> • computer software including word processing, database, spreadsheets, presentation programmes, • communication transfer such as emails, text messaging, fax <p>1.2 the benefits of using information technology for work tasks include:</p> <ul style="list-style-type: none"> • speed and efficiency • accuracy • use of templates in accordance with organisational requirements • large server storage capacity for large volumes of information and documentation

<p>2 Understand how to manage electronic and paper based information</p>	<p>2.1 Explain the purpose of agreeing objectives and deadlines for researching information</p> <p>2.2 Identify different ways of researching, organising and reporting information</p> <p>2.3 Describe procedures to be followed for archiving, retrieving and deleting information, including legal requirements, if required</p> <p>2.4 Explain why confidentiality is critical when managing information</p>	<p>2.1 the purpose of agreeing objectives and deadlines for researching information includes, for example, to ensure the correct information is collected on time</p> <p>2.2 Different ways of researching, organising and reporting information: includes</p> <ul style="list-style-type: none"> • Internet • Library • Reports and case histories • organising information according to relevance and priority • reporting (eg through a presentation or written report) <p>2.3 For example:</p> <ul style="list-style-type: none"> • following company procedures taking regulatory and organisational data protection requirements into account • categorising information • assigning a suitable filename • maintaining records <p>2.4 Information may for example be an individual's personal details which must be kept secure under legislation requirements</p>
<p>3 Understand the purpose of producing documents that are fit-for-purpose</p>	<p>3.1 Identify reasons for producing documents that are fit-for-purpose</p>	<p>3.1 Reasons for producing documents that are fit-for-purpose include:</p> <ul style="list-style-type: none"> • So that it is suitable for the audience it is intended for • So that it meets company standards

	<p>3.2 Describe different types and styles of documents and when they are used</p>	<p>3.2 Different types and styles of documents and when they are used, such as:</p> <ul style="list-style-type: none"> • Letters for clients or customers • Emails with attachments for circulating information to colleagues • Reports for providing information to colleagues
<p>4 Know the procedures to be followed when producing documents</p>	<p>4.1 Identify reasons for agreeing the purpose, content, layout, quality standards and deadlines for the production of documents</p> <p>4.2 Describe ways of checking finished documents for accuracy and correctness, and the purpose of doing so</p> <p>4.3 Explain the purpose of confidentiality and data protection procedures when preparing documents</p> <p>4.4 Compare different types of documents that may be produced from notes and the formats to be followed</p>	<p>4.1 Reasons may include ensuring the correct format is used for the type of document being produced</p> <p>4.2 Ways of checking finished documents such as:</p> <ul style="list-style-type: none"> • using the spell and grammar checker to ensure there are no mistakes • requesting a colleague to check the document to ensure all the necessary information has been included <p>4.3 For example to ensure confidential or sensitive information is only communicated to those for whom it is intended</p> <p>4.4 Different types of documents may include:</p> <ul style="list-style-type: none"> • Minutes from meetings which may need to be completed using a company template • Notes from telephone conversations • Notes from a presentation

	4.5 Explain the procedures to be followed when preparing text from notes	4.5 the procedures to be followed when preparing text from notes include checking things such as: <ul style="list-style-type: none">• the clarity of information• the amount of detail required• what format the notes should take (eg a letter, a report or minutes etc)• accuracy• where the final copy of the document is to be stored
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Assessment

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

The test for this unit will be 40 minutes in length and consist of 25 questions. Results will be graded pass or fail.

The grade achieved will be stated on the certificate.

Guidance on assessment and evidence requirements

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

NOS can viewed on the relevant Sector Skills Council's website or the Occupational standards directory at www.ukstandards.co.uk.

Occupational standards	Unit number	Title
Business And Administration NOS	209	Store, retrieve and archive information
Business And Administration NOS	221	Prepare text from notes
Business And Administration NOS	224	Produce Documents

Functional skills signposting

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 and Listening	9	Representing		Use ICT systems	9
Reading	9	Analysing		Find and select information	9
Writing	9	Interpreting		Develop, present and communicate information	

Resources

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).

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

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.

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.