

<b>Unit Title:</b>	<b>Personal information management software</b>
OCR unit number:	54
Level:	2
Credit value:	2
Guided learning hours:	15
Unit reference number:	L/502/4370

## Unit purpose and aim

This is the ability to use software designed for the purpose of managing and organising contacts, appointments, tasks and notes.

This unit is about the skills and knowledge to use a range of personal information management tools and techniques to organise and prioritise their own time and manage multiple tasks and calendars.

Learning Outcomes	Assessment Criteria	Examples
<p>The learner will:</p> <p>1 Use calendars to schedule appointments and meetings</p>	<p>The learner can:</p> <p>1.1 Create, edit and delete multiple calendar entries</p> <p>1.2 Arrange <a href="#">recurring appointments</a></p> <p>1.3 <a href="#">Invite others to meetings</a> and monitor attendance</p> <p>1.4 Respond to meeting requests from others</p> <p>1.5 <a href="#">Create reminders</a> for calendar appointments and events</p> <p>1.6 Locate, organise and display <a href="#">appointments</a> and events as required</p> <p>1.7 <a href="#">Import and export</a> calendar data</p> <p>1.8 Describe how to <a href="#">share calendars</a> with other users</p>	<p><a href="#">Display appointments</a>: On screen, for print; display style; filters, views, by category; customise calendar settings; multiple calendars; search and retrieve; public calendars</p> <p><a href="#">Invite to meetings</a>: Check availability, notify participants; propose alternative times; display other users' calendars; identify conflicts and free time</p> <p><a href="#">Reminders</a>: Set alarms; send reminders to mobile devices and message services; RSS feeds</p> <p><a href="#">Import and export</a>: iCalendar, vCalendar; link tasks to calendar; synchronise calendar with mobile device</p> <p><a href="#">Share calendars</a>: Multiple calendars, user permission levels, open source and online calendars; subscribe to other calendars. Organise notes: By category, colour, date</p>
<p>2 Use a task list to prioritise activities</p>	<p>2.1 Create, edit and delete task information</p> <p>2.2 <a href="#">Organise and display</a></p>	<p><a href="#">Organise tasks</a>: By category, status, target date; assign and respond to task requests; filters</p>

Learning Outcomes	Assessment Criteria	Examples
	<p><a href="#">tasks</a>, setting targets for completion</p> <p>2.3 Monitor <a href="#">task progress</a> and set reminders</p> <p>2.4 Report on task status and activity</p> <p>2.5 Use software features to <a href="#">work collaboratively</a> on tasks with other users</p>	<p><a href="#">Work collaboratively</a>: Multiple tasks, user permission levels; composite tasks</p> <p><a href="#">Task progress</a>: Percentage completion; postpone task</p>
<p>3 Use an address book to store, organise and retrieve contact information</p>	<p>3.1 Create, <a href="#">update</a> and delete contact information</p> <p>3.2 Locate, <a href="#">organise and display contact</a> information efficiently</p> <p>3.3 <a href="#">Select and export</a> contact details for use in other applications</p> <p>3.4 Create and modify a distribution list</p> <p>3.5 <a href="#">Share contact information</a> with others responsibly</p> <p>3.6 Explain why it is important use personal data <a href="#">responsibly</a> and safely</p> <p>3.7 Describe why and how to keep contact information up to date</p>	<p><a href="#">Update contacts</a>: Multiple entries for single person; automatic updates; assign category</p> <p><a href="#">Organise contacts</a>: By <i>category</i>, name, company; customise display, <i>selected fields</i>; <i>filters</i>; <i>multiple contacts</i></p> <p><a href="#">Responsible use</a>: Password protection, Respect confidentially; public profiles; trust, data protection</p> <p><a href="#">Select and export</a>: Selected fields; selected contacts; for transfer to mobile device, merge with other software</p> <p><a href="#">Share contact information</a>: Beam between mobile devices, vcard</p>

## Assessment

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All ITQ units may be assessed using any method, or combination of methods, which clearly demonstrates that the learning outcomes and assessment criteria have been met. Assessments must also take into account the additional information provided in the unit Purpose and Aims relating to the level of demand of:

- the activity, task, problem or question and the context in which it is set;
- the information input and output type and structure involved; and
- the IT tools, techniques or functions to be used.

See the Assessment and postal moderation section of the [ITQ Centre Handbook](#).

## Evidence requirements

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Candidates must complete the Evidence Checklist for this unit with no gaps. Individual unit checklists are available to download from the qualification [webpage](#) (see forms).

## Guidance on assessment and evidence requirements

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Please refer to the ITQ centre handbook on our [webpage](#).

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

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This unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009).