

Unit Title:	Data management software
OCR unit number:	23
Level:	3
Credit value:	4
Guided learning hours:	30
Unit reference number:	A/502/4560

Unit purpose and aim

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 pre-defined file and record structures, processes, reports and data-entry screens. This is about the use of these pre-defined objects.

Examples of data management software include proprietary systems for:

- Customer Relationship Management (CRM);
- Management Information System (MIS)
- Payroll;
- Enterprise Resource Planning (ERP)

This unit is about selecting and using advanced data management software tools and techniques efficiently to:

- enter complex information;
- retrieve information using complex selection criteria; and
- produce customised reports from the system
- set up menus or short cuts.

The data management system tools, functions and techniques at this level are defined as advanced because:

- the software tools and functions involved will be complex and at times involve having the idea that there may be a tool or function to do something (e.g. improve efficiency or create an effect), exploring technical support, self-teaching and applying; and
- the input, manipulation and output techniques involved will be complex, which will involve research, identification and application.

Examples of Context: Working with the software manufacturer or IT professional to develop and implement new data handling techniques; Examples of customization includes additional product training; creation of process triggers and workflow; assistance writing reports, complex data extracts or implementing Business Intelligence

Learning Outcomes	Assessment Criteria	Examples
<p>The learner will:</p> <p>1 Enter, edit and maintain data records in a data management system</p>	<p>The learner can:</p> <p>1.1. Discuss when and how to change or create a new data entry form</p> <p>1.2. Enter data accurately into records to meet requirements</p> <p>1.3. Configure characteristics of groups of records</p> <p>1.4. Discuss and explain how to locate and amend data records</p> <p>1.5. Check data records meet needs, using IT tools and making corrections as necessary</p> <p>1.6. Interpret and respond appropriately to a range of data and application error messages</p> <p>1.7. Evaluate and explain the risks to data security and procedures used for data protection</p> <p>1.8. Manage data files effectively, in line with local and/or legal guidelines for the storage and use of data where available</p>	<p>Benefits of data management system: accessible, reliable, rapid access, shared view, up-to-date, accurate, secure; simplifies data handling; constraints of using system, audit trail</p> <p>Enter data: Use of data entry form, create new record, add record to table, create new record, add record to table, select and update fields; groups of records</p> <p>Record characteristics: Attributes, categories, teams, flags, keys</p> <p>Check data: Spell check, format, consistency, remove duplication, verify data; data validation techniques, record housekeeping</p> <p>Error messages: Data entry; using help; troubleshooting; logging, reporting and dealing with application errors</p> <p>Security risks and procedures: Access control; authorised use, password protection and management, user authentication</p> <p>Handle data files: File storage, data import and export, restore lost data; identify ineffective backup storage</p> <p>Guidelines for data storage and use: Set by: employer or organisation. Topics covered: security, backup, data format, compliance and reporting, data protection, audit trail</p>

Learning Outcomes	Assessment Criteria	Examples
2 Retrieve and display data records to meet requirements	2.1. Determine and explain what queries and reports need to be run to output the required information 2.2. Create and use queries to search for and retrieve information from the system 2.3. Create, define and set up reports to output information to meet requirements 2.4. Use the file handling techniques of the software to import and export data 2.5. Use available techniques to combine and link data	Search and retrieve: Alphanumeric sort, filter, multiple criteria Reports: Customised reports; define report parameters; for others; system reports; errors in reports Import and export data: to other systems or software; file formats; mail merge; data migration; data archiving

Assessment

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

Candidates must complete the Evidence Checklist for this unit without any gaps. Individual unit checklists are available to download from the qualification [webpage](#) (see forms).

Guidance on assessment and evidence requirements

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

Details of relationship between the unit and national occupational standards

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