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|------------------------|--------------------|
| <b>Unit Title:</b>     | <b>Using email</b> |
| OCR unit number:       | 35                 |
| Level:                 | 3                  |
| Credit value:          | 3                  |
| Guided learning hours: | 20                 |
| Unit reference number: | T/502/4301         |

## Unit purpose and aim

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This is the ability to make the best use of e-mail software to safely and securely send, receive and store messages.

This unit is about the skills and knowledge to help others to make more efficient use of e-mail software tools to send, receive and store messages for complex and non-routine activities.

E-mail tools and techniques will be defined as advanced because:

- the techniques required will be multi-step and complex, and the selection process may involve research, identification and application; and
- the IT tools required 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.

An activity will typically be 'complex and non-routine' because:

- the task is likely to require research, identification and application;
- the context is likely to require research, analysis and interpretation; and
- the user will take full responsibility for developing both the input and output type and structure of the information.

| Learning Outcomes   | Assessment Criteria  | Examples  |
|---|--|---|
| <p>The learner will:</p> <p>1 Use e-mail software tools and techniques to compose and send messages</p> | <p>The learner can:</p> <p>1.1 Select and use software tools to <b>compose and format e-mail</b> messages, including attachments</p> <p>1.2 Explain methods to improve <b>message transmission</b></p> <p>1.3 <b>Send e-mail</b> messages to individuals and groups</p> <p>1.4 Explain why and how to <b>stay safe</b> and respect others when using e-mail</p> <p>1.5 Use an <b>address book</b> to</p> | <p><b>Compose and format e-mail:</b><br/>Format text (font, size, colour); format paragraphs (alignment, bullets, numbered list), spell check, priority; format (rtf, plain text, html), draft, signature, page set up, backgrounds, sound, movie, hyperlink, work on- and offline</p> <p><b>Message transmission:</b><br/>Managing attachments; mailbox restrictions; methods to reduce size or improve transmission; Transmission</p> |

| Learning Outcomes                           | Assessment Criteria  | Examples  |
|---|--|---|
|   | manage contact information   | <p>limitations</p> <p><b>Send e-mail:</b> To, from, cc, bcc, subject; Reply, reply all, forward, distribution list, reply with history; options, set message flags for priority, confidentiality, response request, vote, encoding, schedules, encryption, compression</p> <p><b>Address book:</b> Add, edit, delete contact entries; contacts list, distribution list, sort, display selected fields, import and export contact information, merge lists, synchronise</p> <p><b>Stay safe:</b> Avoid inappropriate disclosure of personal information, avoid misuse of images, use appropriate language, respect confidentiality, use copy lists with discrimination; using encryption</p> |
| 2 Manage use of e-mail software effectively | <p>2.1 Develop and communicate <b>guidelines and procedures</b> for using e-mail effectively</p> <p>2.2 Read and <b>respond appropriately</b> to e-mail messages and attachments</p> <p>2.3 Use email software tools and techniques to <b>automate responses</b></p> <p>2.4 Explain why, how and when to archive messages</p> <p>2.5 <b>Organise, store</b> and archive e-mail messages effectively</p> <p>2.6 Customise e-mail software to make it easier to use</p> <p>2.7 Explain how to minimise <b>e-mail problems</b></p> <p>2.8 Respond appropriately to email problems</p> | <p><b>Guidelines and procedures:</b> Set by employer or organisation, Health and safety, security, copyright ; netiquette; password protection</p> <p><b>E-mail responses:</b> Decide on priorities, gather information needed to respond, decide when and who to copy in, what to do about attachments; reduce unwanted e-mail, manage time</p> <p><b>Automate responses:</b> Rules, automatic replies, changing settings to deal with junk mail; out of office, scheduling; templates</p> <p><b>Organise and store e-mail:</b> Folders, subfolders, delete unwanted messages, backup,</p>   |

| Learning Outcomes | Assessment Criteria | Examples  |
|-------------------|---------------------|---|
|                   |                     | <p>address lists, move after sending, rules, archive folders; attachments, file compression, public folders</p> <p><b>Email problems:</b> Due to message size or number of attachments, messages from unknown users (SPAM, junk, chain-mails, 'phishing'), viruses, messages intended to cause problems; mailbox full, identifying when problems are local or linked to the service provided by ISP</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 without any 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).