

**ADMINISTRATION**  
**Higher**

**Seventh edition - published August 2001**

**NOTE OF CHANGES TO ARRANGEMENTS  
SEVENTH EDITION PUBLISHED AUGUST 2001**

**COURSE TITLE:** Administration (Higher)

**COURSE NUMBER:** C002 12

**National Course Specification**

Course Details Changes on section: Details of the Instruments for  
External Assessment

**National Unit Specification**

All Units No changes

## National Course Specification

### ADMINISTRATION (HIGHER)

**COURSE NUMBER** C002 12

#### COURSE STRUCTURE

This course has two mandatory units, as follows:

<i>D011 12</i>	<i>Administrative Services (H)</i>	<i>1 credit (40 hours)</i>
<i>D012 12</i>	<i>Information Technology for Management (H)</i>	<i>2 credits (80 hours)</i>

All courses include 40 hours over and above the 120 hours for the component units. This may be used for induction, extending the range of learning and teaching approaches, support, consolidation, integration of learning and preparation for external assessment.

#### RECOMMENDED ENTRY

While entry is at the discretion of the centre, candidates will normally be expected to have attained one of the following:

- Standard Grade Office and Information Studies or Standard Grade Administration at Credit level
  - Intermediate 2 Administration
  - the component units of Intermediate 2 Administration - *Administrative Support (Int 2)*, *Information Technology: Office Applications (Int 2)* and *Word Processing 2 (Int 2)*
- and**
- Standard Grade English at Credit level.

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#### Administrative Information

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## National Course Specification: (cont)

**COURSE** Administration (Higher)

### CORE SKILLS

This course gives automatic certification of the following:

<b>Complete core skills for the course</b>	Problem Solving	H
	Working with Others	H
	IT	H
<b>Additional core skills components for the course</b>	Oral Communication	Int 1

For information about automatic certification of core skills for any individual unit in this course, please refer to the general information section at the beginning of the unit.

Additional information about core skills is published in *Automatic Certification of Core Skills in National Qualifications* (SQA, 1999).

## National Course Specification: course details

**COURSE** Administration (Higher)

### **RATIONALE**

Business and enterprise are at the heart of national growth and development and this is reflected in the important place that Business Education assumes in the post-16 curriculum. The provision offers opportunities for candidates to develop the crucial skills and knowledge which allow them to access, understand and contribute to the dynamic and complex business and information environment. Whatever the career pathway or progression route, Business Education can provide a valuable context which enhances individual effectiveness.

If the office is the heart of the organisation, information is the life blood flowing through it. The success of any organisation depends on this information, how it is used and how it is managed. The role of administration is to provide support or services to underpin operations and decision making, as well as to design, operate and evaluate systems for the organisation's activities. All organisations require the effective management of data and information so that the aims of the organisation are met, and all organisations require staff who are competent at managing information. This reflects the primary role of the office as the main provider of information on which decisions are based. Using technology has become part of office work to such an extent that it is now an essential tool for all who work in administration in any business environment. Study of this course will not only equip the candidates with the level of competence required for using a range of software packages in an office environment, but it will also enable them to research, evaluate and summarise information in an effective way.

The core of the course is problem solving. Problem solving is rarely an activity carried out in isolation. Decisions taken at all levels of an organisation affect the whole organisation. The solution of a problem for one part of the organisation can result in further problems for other parts of the organisation. Interpretation and communication, therefore, become key elements in problem solving. Solutions in business are seldom finite and consequently there will need to be reviews and amendments to respond to changing circumstances and demands.

It is essential that planning and organising skills are developed to aid decision making and that systems and procedures in use should be analysed and evaluated. Throughout this course, candidates should be encouraged to make use of general purpose software packages and to use the software at their disposal in as flexible a way as possible. Alternative courses of action will require to be examined, decisions made, those decisions evaluated and the results monitored. Not only should candidates be required to work on their own, but they should also be required to work with other people, thus developing the inter-personal skills required when working in a business environment.

The aims of the course are to build on the knowledge, understanding and skills developed in Standard Grade Office and Information Studies or Standard Grade Administration and Intermediate 2 Administration in an integrative way. Not only will this increase candidates' technological confidence but it will also encourage them to use the technology at their disposal in a creative way. Candidates will be required to evaluate, amend and adapt their problem-solving strategies throughout. The aims of the course are to develop the candidates':

- skills in information technology through using business hardware and software to aid problem solving
- skills in communication by learning to communicate ideas in a logical and effective manner
- skills in problem solving
- the personal effectiveness skills needed of candidates to work both as part of a group and on their own initiative
- knowledge of organisational and time-management skills

## National Course Specification: course details (cont)

**COURSE** Administration (Higher)

- ability to monitor and analyse targets
- knowledge and understanding of where to find information, how to extract the relevant parts required and present it in a format acceptable to business
- ability to integrate different types of data to solve specific business problems
- knowledge and understanding of legislation affecting those working in an office environment
- knowledge of how to plan and organise meetings, travel arrangements, appointments and other administrative procedures
- ability to take and accurately transcribe minutes at meetings.

As a result, the candidates will learn how to work effectively in a business environment, integrating organisational and information technology skills in a manner which will benefit them in any administrative work they may tackle at a further stage in their career.

### COURSE CONTENT

It is envisaged that throughout this course a thematic approach will be taken within the learning, teaching and assessment strategies adopted by centres.

It is important that candidates wishing to succeed in the course (as distinct from the achievement of the individual units) should understand the holistic nature of the whole course. The purpose of the extra 40 hours is to enable this to be achieved. There are two complementary aspects to this. The first is that additional demands will be placed on candidates, while the second involves the use of a variety of learning and teaching strategies.

These additional demands will require candidates to:

- demonstrate their ability to integrate the knowledge, understanding and skills acquired in *Administrative Services* with those acquired in *Information Technology for Management*
- use this ability to demonstrate research, evaluation and problem-solving skills within given time constraints
- apply their knowledge and skills to unfamiliar and complex contexts
- produce documentation to a standard acceptable in business.

The course content is set out in the two component units of *Administrative Services (H)* and *Information Technology for Management (H)*.

All of the course content will be subject to sampling in the external assessment.

## National Course Specification: course details (cont)

**COURSE** Administration (Higher)

### *Administrative Services (H)*

1 Plan, organise and monitor work

*Methods and procedures*

Planning, prioritising, organising and dealing with changing priorities; time management; co-ordinating resources. Negotiating the assistance of others.

Setting targets; establishing and implementing control mechanisms; monitoring achievement of targets and dealing with deviations from planned targets.

Researching of issues, reporting and making recommendations; means of communicating information.

*Role of administrative services*

Scope, influence, limit and importance of administration to the organisation.

Scope and limit of own authority for action.

2 Develop, implement and maintain procedures

*Types of procedures*

Common procedures, such as filing, photocopying, telephone calls, fax transmission, incoming and outgoing mail, which apply to routine administrative functions - storing, retrieving, recording, communicating using voice, data and text, checking, sorting, monitoring, analysing and presenting information.

*Introducing new procedures*

Informing and consulting others; designing, specifying and developing new ideas; formulating and estimating costs and benefits.

Form design; form control.

Implementing procedures, supplying guidance to users and monitoring the effectiveness of new procedures.

## National Course Specification: course details (cont)

### COURSE

Administration (Higher)

- |   |   |   |
|---|---|---|
| 3 | Manage appointments<br><i>Methods and procedures</i>  | Prioritising, organising and recording using paper-based and electronic formats; monitoring and updating systems; dealing with non-routine and emergency situations.  |
| 4 | Organise and monitor travel and accommodation arrangements<br><i>Information requirements</i> | Obtaining details of requirements, booking and monitoring travel and accommodation needs.<br><br>International time zones and effects on arrangements.<br><br>Practices, procedures and standards required when dealing with businesses abroad; cultural differences. |
|   | <i>Methods and procedures</i>   | Preparing itineraries; evaluating and monitoring costs in terms of routes and methods of travel; making monetary arrangements and dealing with exchange rates.<br><br>Checking and verifying expenditure; dealing with problems.                                      |
|   | <i>Requirements</i>   | Visa requirements; medical requirements; insurance requirements.  |
| 5 | Organise, support and record meetings<br><i>Roles and responsibilities</i>                    | Purpose and nature of meetings.<br><br>Chair, Secretary and other participants; organisation's procedures; conventions and terms used in the conduct of meetings.   |
|   | <i>Arrangement</i>  | Selecting and evaluating venues for meetings and events; catering facilities; requirements of participants with special needs; booking of facilities, such as size of rooms, overhead projector, video; budgeting within financial constraints of the organisation.   |

## National Course Specification: course details (cont)

**COURSE** Administration (Higher)

*Arrangements (Cont)*

Arrangements for attendance; notice and agenda preparation; methods of recording key issues and decisions and preparation of minutes, reports and action minutes as required.

Consequences of inadequate preparation for meetings and events.

## National Course Specification: course details (cont)

**COURSE** Administration (Higher)

### *Information Technology for Management (H)*

1 Use business software to solve administrative problems

*Use of software and hardware*

Input and output devices; loading and exiting applications; recalling, amending, saving and producing hard copy in each software application; troubleshooting.

Back-up and safety procedures; security and confidentiality procedures; ways of protecting equipment and data.

*Sources of information*

CD ROM, Internet, computer files, remote databases, books, lists, directories and people; sources should be both internal and external to the organisation.

How to research and edit materials.

Security and confidentiality procedures of the organisation; organisational procedures for copying and storing documents, and legal and regulatory requirements relating to the use and provision of information.

*Problem solving*

Identifying the problem, gathering information, producing, implementing and modifying a strategy for solving the problem.

*Use of software*

Choice of relevant software; concepts of database management systems; awareness of the potential of systems being used.

Use of methods to simplify data entry, interrogation and retrieval, such as macros, automatic insertion of text, scanners, integration of software packages.

*Presentation*

Layout of work in accordance with organisational house style or accepted convention; documents should include letters, memos, notices, agendas, minutes, action minutes and reports.

## National Course Specification: course details (cont)

COURSE	Administration (Higher)
<i>Integration of data</i>	Across files and across applications to a standard acceptable in business and in accordance with organisational house style.
2 Evaluate developments <i>Information</i>	Improvements in speed, accessibility and quality of information.
<i>Communications</i>	Input devices, communication devices and output devices which are likely to have a major impact on business, for example, LANs, WANs, modems, Internet, e-mail, conferencing, CD ROMs and other new developments including telephone technology, mobile phones, pagers, voice mail. The above are given as examples only and it is anticipated that with changes in technology these would change. Topical examples should always be considered.
<i>Effect of new technology</i>	Security implications.  Implications of changes in technology - for example, for size, working practices, recruitment, training, financial implications, structure.  Homeworking, outsourcing, downsizing, restructuring.  Management of the process of change.
3 Current legislation <i>Legislation</i>	Data protection; health and safety, particularly with reference to VDUs; copyright.
<i>Organisational procedures</i>	Security procedures; password and access controls; methods of communication for enforcement of legislation; recommended practice.

## National Course Specification: course details (cont)

### COURSE

Administration (Higher)

- 4 Evaluate the role of information in decision making

Strategic, tactical and operational levels of decision making.

*Information*

The nature of information; role and importance of information. growth, speed, accessibility, quality and quantity of information and its relevance to decision making.

Sources of information - electronic, paper-based, oral, internal and external to the organisation.

*Methods and procedures*

Methods of processing: receiving, checking, sorting, analysing, recording, storing, summarising, comparing, retrieving, transmitting and presenting information.

Channels of communication.

*Organisation*

Structure and functional areas; ways of drawing organisation charts and informal networks.

## **National Course Specification: course details (cont)**

**COURSE** Administration (Higher)

### **ASSESSMENT**

To gain the award of the course, the candidate must achieve all the component units of the course as well as the external assessment.

The external assessment will provide the basis for grading attainment in the course award.

When units are taken as component parts of a course, candidates will have the opportunity to demonstrate achievement beyond that required to attain each of the unit outcomes. This attainment may, where appropriate, be recorded and used to contribute towards course estimates, and to provide evidence for appeals. Additional details are provided, where appropriate, with the exemplar assessment materials. Further information on the key principles of assessment are provided in the paper, *Assessment* (HSDU, 1996) and in *Managing Assessment* (HSDU, 1998).

### **DETAILS OF THE INSTRUMENTS FOR EXTERNAL ASSESSMENT**

External assessment is based on 2 papers of 60 marks each:

Paper 1 (1 hour 30 minutes)

This instrument will examine knowledge and understanding, covering the course content.

The paper will comprise of 2 sections, the first consisting of stimulus material e.g. a newspaper/magazine article or company report (300-500 words), with questions. The second section will require candidates to complete 2 extended response questions from a choice of 5.

This paper will be allocated 50% of the total marks available.

Paper 2 (1 hour 10 minutes)

This instrument will cover the use of Information Technology for problem-solving in business.

The IT skills tested will be drawn from the course content as described in the Arrangements document. It is envisaged that a minimum of 2 applications will be sampled in this paper, which will be allocated 50% of the marks available.

Teachers/lecturers should note that candidates will not be required to pass both papers to achieve an overall pass in this subject.

## National Course Specification: course details (cont)

**COURSE** Administration (Higher)

### GRADE DESCRIPTIONS

The descriptions below are of expected performances at Grade C and at Grade A. They are intended to assist candidates, teachers, lecturers and users of the certificate and to help establish standards when question papers are being set. The grade of the award will be based on the total score obtained in the examination.

#### Grade C

In order to obtain a Grade C for Higher Administration, a candidate must:

- apply knowledge and understanding to a number of familiar and unfamiliar contexts
- demonstrate some ability to integrate material drawn from any part of the course content
- show a basic understanding of the main elements of the problem-solving process and how it can be applied to administration
- demonstrate an ability to suggest solutions to administrative problems involving a limited number of variables, using the software and hardware available
- demonstrate an ability to use the software and hardware available to best advantage within given time constraints.

#### Grade A

In addition, candidates who wish to achieve a Grade A must demonstrate the ability to:

- consistently apply knowledge and understanding to a range of familiar and unfamiliar contexts, some of which may be complex
- demonstrate a high degree of ability to integrate material drawn from any part of the course content
- show an ability to research information and use the information to aid problem solving, illustrate possible solutions and make decisions based on researched information, within given time constraints
- demonstrate accurate and efficient use of the software and hardware at their disposal, within given time constraints.
- demonstrate clarity and logic in the presentation of their solutions.

### APPROACHES TO LEARNING AND TEACHING

Although the units could be delivered independently, it is envisaged that they will be taught in tandem. Throughout, the learning and teaching approach should emphasise the integrated nature of administrative work and the importance of using information technology as a tool necessary in modern administrative work. Teachers and lecturers may like to think in terms of using a single organisation to help candidates contextualise their learning and to serve as the method of introducing candidates to the kind of procedures which would be used in business. To this end, teachers and lecturers may wish to develop a handbook with the kind of procedures which they would like followed in the simulated firm, with each candidate having access to the handbook to help them when they are unsure. Centre-devised procedures would obviously be able to take into account the equipment and facilities available in that centre. It is envisaged that delivery of these units will take place in an environment which mirrors that found in business, with candidates having access to computers and resources usually found within an office, for example, filing cabinets, reference sources, in-trays, telecommunication devices and general purpose business software packages.

## National Course Specification: course details (cont)

### COURSE Administration (Higher)

While, initially, there will be significant teacher and lecturer input, it is envisaged that for much of the time in this course the teacher or lecturer will act as facilitator or supervisor, checking on the pace and content of what is being produced. Candidates will be encouraged to produce work within given deadlines, and work produced should be of a quality acceptable in business. Some learning and teaching activities should be sufficiently weighty to extend over more than one teaching period while other tasks will have a short completion time.

Integrating the content of the two units and the various outcomes can be achieved in several ways and, ideally, should be tackled throughout the teaching of the course. For example, the use of organisational documentation and correct forms of communication should be encouraged. Candidates should be encouraged to present all information in a form which is acceptable in a business environment. Templates or pro-formas could be set up on the centre's system to promote this approach and to provide a more realistic business environment. The kind of documents envisaged here are memos, reports, minutes, agendas and notices, all of which would follow a particular organisational house style. Not only would this encourage the candidate to input directly on to a machine but it is also in keeping with the practices followed by most large organisations to ensure conformity.

The element of time constraints is important in a vocational context, and candidates should be introduced to time constraints at an early stage in the course. When meeting deadlines is crucial, candidates should be encouraged to seek help and give help to colleagues when required. Introducing timed elements at an early stage in the course, for small projects or pieces of work, will help candidates begin to judge how much time they require to carry out certain tasks. These time constraints should be introduced to integrative tasks, to encourage candidates to plan their time and the use of the equipment at their disposal. Candidates should also make extensive use of case studies, simulations and role-plays. The use of general purpose software should be encouraged, as should access to the Internet and CD ROMs for information. However, it is important to note that developments in technology may mean that certain tasks could be carried out in a number of ways, for example, using e-mail or fax or using answering machines or voice mail. The choice of method may depend on appropriateness to purpose and the level of technology available.

Learning within a particular context is more meaningful to most candidates. The simulated organisation approach could be widened during the course with candidates being asked to carry out tasks for various departments in the organisation, thus widening their experience of dealing with different contexts. They could, for example, produce work for different departments of one organisation, for example, Accounts and Human Resources. Alternatively, candidates could be given the scenario of working for an agency and be asked to work for several different organisations. This kind of approach should encourage candidates to identify common procedures and practices between different types of organisation.

Throughout this course, a thematic approach should be taken within the learning, teaching and assessment strategies adopted by centres. It may be helpful for centres to look at the support notes alongside the unit specifications.

## National Course Specification: course details (cont)

### **COURSE** Administration (Higher)

It will be noticed that a generic approach has been taken for Outcomes 1 and 2 in *Administrative Services*, followed by Outcomes 3, 4 and 5 which focus on specialist administrative areas. *Information Technology for Management* also takes a generic approach in Outcomes 2, 3 and 4 and uses the specific resources available in the centre in Outcome 1. Outcomes which relate to generic approaches can be more flexibly adapted by centres to suit the resources they have to hand. Throughout, candidates should be encouraged to take an innovative approach to using the software at their disposal. As this is a course with a strong work-related dimension, centres should be encouraged to use software and hardware which reflects that found in business. Where appropriate, arrangements should be made to ensure that there will be no artificial barriers to learning or assessment. The nature of a candidate's special needs should be taken into account when planning learning experiences. Alternative arrangements can be made as necessary.

### **SPECIAL NEEDS**

This course specification is intended to ensure that there are no artificial barriers to learning or assessment. Special needs of individual candidates should be taken into account when planning learning experiences, selecting assessment instruments or considering alternative outcomes for units. For information on these, please refer to the SQA document *Guidance on Special Assessment and Certification Arrangements for Candidates with Special Needs/Candidates whose First Language is not English* (SQA, 1998).

### **SUBJECT GUIDES**

A Subject Guide to accompany the Arrangements document has been produced by the Higher Still Development Unit (HSDU) in partnership with the Scottish Consultative Council on the Curriculum (SCCC) and Scottish Further Education Unit (SFEU). The Guide provides further advice and information about:

- support materials for each course
- learning and teaching approaches in addition to the information provided in the Arrangements document
- assessment
- ensuring appropriate access for candidates with special educational needs

The Subject Guide is intended to support the information contained in the Arrangements document. The SQA Arrangements documents contain the standards against which candidates are assessed.

## National Unit Specification: general information

**UNIT** Administrative Services (Higher)

**NUMBER** D011 12

**COURSE** Administration (Higher)

### SUMMARY

This unit is designed to enable candidates to develop and apply skills and knowledge to given situations which require problems to be solved and decisions to be made about administrative services. The candidate will learn how to manage targets, develop, implement and maintain procedures, to organise and support meetings, and to make travel and accommodation arrangements.

### OUTCOMES

- 1 Contribute to the planning, organising and monitoring of work.
- 2 Develop, implement and maintain procedures to meet specified needs.
- 3 Manage appointments.
- 4 Organise and monitor travel and accommodation arrangements.
- 5 Organise, support and record meetings.

### RECOMMENDED ENTRY

While entry is at the discretion of the centre, candidates will normally be expected to have attained one of the following:

- Standard Grade Office and Information Studies or Standard Grade Administration at Credit level
- Intermediate 2 Administration
- the component units of Intermediate 2 Administration - *Administrative Support (Int 2)*, *Information Technology: Office Applications (Int 2)* and *Word Processing 2 (Int 2)*

and

- Standard Grade English at Credit level.

### CREDIT VALUE

1 credit at Higher.

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### Administrative Information

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## National Unit Specification: general information (cont)

**COURSE** Administration (Higher)

### CORE SKILLS

This unit gives automatic certification of the following:

<b>Complete core skills for the unit</b>	Problem Solving	H
	Working with Others	H
<b>Additional core skills components for the unit</b>	Oral Communication	Int 1

Additional information about core skills is published in *Automatic Certification of Core Skills in National Qualifications* (SQA, 1999).

## **National Unit Specification: statement of standards**

### **UNIT** Administrative Services (Higher)

Acceptable performance in this unit will be the satisfactory achievement of the standards set out in this part of the unit specification. All sections of the statement of standards are mandatory and cannot be altered without reference to the Scottish Qualifications Authority.

#### **OUTCOME 1**

Contribute to the planning, organising and monitoring of work.

##### **Performance Criteria**

- a) Tasks and work methods are identified and prioritised, and resources allocated to enable completion.
- b) Changes in priorities are recognised and resource allocations adapted accordingly.
- c) Relevant assistance is identified, negotiated and co-ordinated to meet specific demands and deadlines.
- d) Work methods and activities are reviewed, analysed and evaluated against agreed targets.

##### **Note on Range for the Outcome**

Tasks: own tasks, tasks agreed with others.

Resources: equipment, materials, own time, other people's time.

Agreed targets relate to: quantity, time, quality.

##### **Evidence Requirements**

Work Plan and Review. Notes of discussions. Notes of calculations.

#### **OUTCOME 2**

Develop, implement and maintain procedures to meet specified needs.

##### **Performance Criteria**

- a) Procedures are designed after needs, benefits and costs have been identified and agreed.
- b) Accurate, clear and comprehensive guidance and support is provided to users to enable action to be carried out.
- c) The effectiveness of procedures, in meeting their purpose, is assessed and evaluated, opportunities for improvements are identified and appropriate action taken.

##### **Note on Range for the Outcome**

Procedures are designed: on own initiative, in collaboration with others.

##### **Evidence Requirements**

Evidence should be in the form of an extended response which would include the design of procedures and guidance for users based on case study material. In addition a schedule of costs and benefits should be available, along with records of implementation procedures and monitoring devices to be used.

## **National Unit Specification: statement of standards (cont)**

**UNIT** Administrative Services (Higher)

### **OUTCOME 3**

Manage appointments.

#### **Performance Criteria**

- a) Appointments are negotiated, agreed and confirmed with appropriate persons within given time and work constraints.
- b) Essential information is recorded appropriately and is up to date, legible and accurate.
- c) Reasons for non-attendance at appointments are promptly clarified and reported to the appropriate persons.
- d) Security and confidentiality procedures conform to organisational requirements.

#### **Note on Range for the Outcome**

Appointments: for self, for others.

Persons: internal to the organisation, external to the organisation.

Recorded: paper diary, electronic diary.

#### **Evidence Requirements**

Copies of paper diary and printouts of electronic diary, notes of actions taken.

### **OUTCOME 4**

Organise and monitor travel and accommodation arrangements.

#### **Performance Criteria**

- a) Planned travel and accommodation arrangements are within budget.
- b) An accurate and comprehensive itinerary is drawn up.
- c) All supporting documentation is provided to the relevant person within agreed deadlines.
- d) Monetary arrangements are made for travel and accommodation.
- e) Claims for expenditure are checked and verified before forwarding for payment.
- f) Problems arising from arrangements are investigated and appropriate action taken.

#### **Note on Range for the Outcome**

Monetary arrangements: provision of foreign currency, travellers' cheques.

Supporting documentation: Itinerary, Summary of Travel and Accommodation Research Form

Claims for expenditure: invoices relating to costs of travel and accommodation, expense claims from individuals for whom arrangements were made.

Travel and Accommodation: rail, air, road, sea; within the UK, overseas.

#### **Evidence Requirements**

Itinerary, Summary of Travel and Accommodation Research Form, checked claims for payment.

Evidence of investigation of complaints and action taken will also be required.

## **National Unit Specification: statement of standards (cont)**

**UNIT** Administrative Services (Higher)

### **OUTCOME 5**

Organise, support and record meetings.

#### **Performance Criteria**

- a) The venue and facilities arranged are appropriate to the nature of the meeting.
- b) Dates are arranged, attendance is confirmed and, where appropriate, recorded.
- c) All required materials and documents for the meeting are obtained and prepared, prior to the meeting.
- d) Key issues and decisions and any actions arising from meetings are identified and accurately recorded.

#### **Note on Range for the Outcome**

Facilities: refreshments.

Documents: notice, agenda and/or chairperson's agenda, minutes (action or traditional)

Venue: internal to the organisation, external to the organisation.

#### **Evidence Requirements**

Correspondence and notes relating to arrangement of venues and dates, notices, agendas and minutes of meetings.

## National Unit Specification: support notes

### UNIT Administrative Services (Higher)

This part of the unit specification is offered as guidance. None of the sections of the support notes is mandatory.

While the time allocated to this unit is at the discretion of the centre, the notional design length is 40 hours.

#### GUIDANCE ON CONTENT AND CONTEXT FOR THIS UNIT

This unit would be suitable for anyone wishing to learn how to manage projects, organise events and make decisions in an office environment. The unit will help candidates to acquire the skills necessary to plan, organise and evaluate projects and events which involve both the candidates' time and other people's time, deal with the administrative details required for meetings, travel and accommodation arrangements and to develop, implement and maintain procedures for the organisation.

This unit is set in the context of the modern business environment and candidates should be introduced to up-to-date office procedures and practices throughout. Throughout the teaching of the individual units, the use of a simulated organisation is to be encouraged. Learning within a particular context is more meaningful to most candidates. This approach could be widened during the unit, with candidates being asked to carry out tasks for various departments in the organisation, thus widening their experience of dealing with different contexts. They could, for example, do some work for the Accounts Department and some work for Human Resources, emphasising the common elements between departments within the one organisation and the differences between them.

Links with commerce and industry would be particularly useful to candidates undertaking this unit and centres should be encouraged to link the unit to any work experience or visits. Visits could be organised in a structured way, with different groups of candidates finding out how the organisation deals with some aspects the candidates have already studied. Throughout the unit, candidates should be aware not only of what they are being asked to do but also of other people's work roles.

#### Outcome 1

Candidates should be aware of how to plan, prioritise and organise work to enable *Administrative Services* to be provided efficiently. They should learn how to deal with changing priorities and study different approaches to managing time efficiently. Candidates should learn how to set realistic targets, how to monitor those targets, and how to establish and implement control procedures to ensure that targets are achieved. Candidates will have to know how to review and evaluate work against targets set and will have to know how to take corrective actions within their own authority. In this outcome, candidates will have to learn how to co-ordinate resources and tasks, and how to work with others when they require assistance. They will have to know the procedures to be followed to communicate issues and recommendations in a business environment.

#### Outcome 2

Candidates should be aware of the types of procedures which apply to routine administrative functions such as filing, photocopying, telephone calls, fax transmission, incoming and outgoing mail. They will have to look at ways of designing, specifying and developing new procedures after the investigation and evaluation of existing procedures. Part of this will include candidates looking at costs and benefits of both existing and planned procedures. Candidates will have to develop methods of informing people of changes and providing guidance for users. Candidates should be aware of the effects of change on users and should plan implementation procedures and ways of monitoring the effectiveness of the new procedures. Form layout, design and control should be an integral part of this outcome.

## **National Unit Specification: support notes (cont)**

### **UNIT** Administrative Services (Higher)

#### **Outcome 3**

Candidates will have to know how to deal with routine and unexpected situations, and how to prioritise and organise appointments. They will need to know how to monitor and update systems, both electronic and paper-based, and about the procedures and formats required for different types of appointments for different people.

#### **Outcome 4**

Candidates should know how to obtain details of travel and accommodation requirements, how to book, prepare itineraries, and evaluate alternatives in terms of costs and time, which should include problems arising from international time zones. They should know how to make monetary arrangements and make calculations using exchange rates. They will be required to find out about visa requirements, and medical and insurance arrangements for travel outside the UK. Candidates should also know how to monitor travel and accommodation arrangements in line with financial limitations and should be able to check and verify expenditure. They should know how to deal with problems and complaints arising from arrangements made.

#### **Outcome 5**

Candidates should be able to distinguish between different types of meeting and understand the purpose and nature of a formal business meeting. Candidates should know how to select and evaluate venues and facilities, and make arrangements for meetings in line with requirements and within financial constraints. They should also be aware of the consequences of inadequate preparation prior to and during meetings. They will need to know how to prepare agendas, record attendance, record key issues and decisions and be able to prepare reports and minutes. They should be aware of the roles and responsibilities of participants at meetings, for example, Secretary, Chair, Treasurer, and should also be aware of the conventions in the conduct of meetings. Candidates should be familiar with common terminology used at meetings, for example, quorum, standing orders, ex officio, resolutions, etc and should know where to find information on the conduct of special meetings such as EGMs and AGMs .

### **GUIDANCE ON LEARNING AND TEACHING APPROACHES FOR THIS UNIT**

Candidates should be encouraged to take a positive attitude towards the quality of their own work throughout this unit, and should be largely self-correcting. Realistic materials and documentation should be used throughout and a thematic approach adopted where possible. Where the approach is taken to work for one 'organisation', the approach should be continued throughout the learning and teaching as well as the assessment procedures. Where possible, an integrative approach should be taken.

Centres may find it helpful to develop their own organisation which could be based in their local area and retain a local character. If there are already good links with local employers, it may be possible to base some of the documentation on their procedures. Every effort should be made to use the kind of activities, equipment and materials used in the workplace, and to provide candidates with working conditions which reflect those found in the workplace.

It is anticipated that some of the outcomes will be overtaken in tandem with others. For example, the first two outcomes, which are of a generic nature, will be able to be integrated with some of the other outcomes. The candidate arranging a meeting or event for a number of delegates would overtake many of the performance criteria outlined in Outcome 1. When arranging a meeting for Outcome 5, Outcome 3 could also be overtaken.

## **National Unit Specification: support notes (cont)**

**UNIT** Administrative Services (Higher)

### **GUIDANCE ON APPROACHES TO ASSESSMENT FOR THIS UNIT**

The following are guidelines on the content of the assessment instruments:

#### **Outcome 1**

The assessment instrument for this outcome is performance of the candidate:

- discussing with colleagues to identify workloads and priorities
- drawing up work plans and targets alone and in conjunction with colleagues
- responding to changes in priorities and altering work plans
- negotiating and obtaining assistance
- co-ordinating work with others.

Copies of 'To Do' lists, work plans, targets, records of discussions and any alterations to targets should be retained along with any records of discussions with colleagues. All of this evidence should be generated within the context of the other outcomes.

#### **Outcome 2**

For the assessment of this outcome, the candidate will be required to produce hard copy of procedures developed, implemented and maintained which have improved the effectiveness of the administrative support given. This could be in an administrative area familiar to the candidate, for example, procedures for filing, photocopying, using reference materials, or diaries, but could be related to the procedures being developed for Outcomes 4 and 5.

#### **Outcome 3**

For the assessment of this outcome, the candidate will be required to produce hard copy of records of appointments, and notes of any discussions and correspondence relating to appointments. This could be generated from Outcomes 4 and 5.

#### **Outcome 4**

The assessment for this outcome is based on the candidate making arrangements for two journeys.

The candidate should prepare for a trip in the UK using rail travel and sea travel, and involving overnight accommodation, as well as a trip overseas using air travel and car hire. This could link in with Task 2 of Outcome 5, providing travel and accommodation arrangements for delegates attending the external meeting. The resulting claims for expenditure should then be verified by the candidate. Evidence should also be available of the candidate monitoring travel and accommodation arrangements, investigating complaints and taking appropriate action.

#### **Outcome 5**

The assessment for this outcome is based on two tasks:

Task 1: The candidate should prepare for a small internal meeting held to discuss proposed changes to procedures (Outcome 2) within a section. The candidate should arrange venue, overhead projector and refreshments, prepare an agenda and other papers prior to the meeting and take notes and prepare minutes from the meeting.

## **National Unit Specification: support notes (cont)**

### **UNIT** Administrative Services (Higher)

Task 2: The candidate should also prepare for a larger external meeting which would involve the preparation of a notice and agenda and chairperson's agenda and other papers. The candidate should also prepare minutes for circulation from notes provided.

#### **SPECIAL NEEDS**

This unit specification is intended to ensure that there are no artificial barriers to learning or assessment. Special needs of individual candidates should be taken into account when planning learning experiences, selecting assessment instruments or considering alternative outcomes for units. For information on these, please refer to the SQA document *Guidance on Special Assessment and Certification Arrangements for Candidates with Special Needs/Candidates whose First Language is not English* (SQA, 1998).

## National Unit Specification: general information

<b>UNIT</b>	Information Technology for Management (Higher)
<b>NUMBER</b>	D012 12
<b>COURSE</b>	Administration (Higher)

### SUMMARY

This unit is designed to enable candidates to use information technology to help management solve problems, to evaluate the use of new developments for their organisation and to monitor and evaluate new procedures and systems as they are introduced. In addition, candidates will learn how to research, extract and collate information and present that information in a form acceptable to business.

### OUTCOMES

- 1 Use business software to solve administrative problems for managers.
- 2 Evaluate developments in information technology in relation to management's needs.
- 3 Advise on the responsibilities of the organisation in relation to current legislation and good working practice.
- 4 Assess the role of information in decision making.

### RECOMMENDED ENTRY

While entry is at the discretion of the centre, candidates will normally be expected to have attained one of the following:

- Standard Grade Office and Information Studies or Standard Grade Administration at Credit level
- Intermediate 2 Administration
- the component units of Intermediate 2 Administration - *Administrative Support (Int 2)*, *Information Technology: Office Applications (Int 2)* and *Word Processing 2 (Int 2)*

and

- Standard Grade English at Credit level.

### CREDIT VALUE

2 credits at Higher.

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#### Administrative Information

<b>Superclass:</b>	CY
<b>Publication date:</b>	April 2000
<b>Source:</b>	Scottish Qualifications Authority
<b>Version:</b>	05

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## National Unit Specification: general information (cont)

**UNIT** Information Technology for Management (Higher)

### CORE SKILLS

This unit gives automatic certification of the following:

**Complete core skills for the unit** Problem Solving H

**Additional core skills components for the unit** None

Additional information about core skills is published in *Automatic Certification of Core Skills in National Qualifications* (SQA, 1999).

## **National Unit Specification: statement of standards**

### **UNIT** Information Technology for Management (Higher)

Acceptable performance in this unit will be the satisfactory achievement of the standards set out in this part of the unit specification. All sections of the statement of standards are mandatory and cannot be altered without reference to the Scottish Qualifications Authority.

#### **OUTCOME 1**

Use business software to solve administrative problems for managers.

##### **Performance Criteria**

- a) The choice of software application, formats chosen and hard copy produced are suited to the type of data and the specification required to solve a business problem.
- b) Relevant information is researched from appropriate sources, entered accurately, amended, integrated and documents produced as specified.
- c) Security and confidentiality of both data and source material are maintained.
- d) Factors affecting the problems are identified correctly and a suitable plan is produced, implemented and modified when necessary.

##### **Note on Range for the Outcome**

Software application: spreadsheet, database and a word processing, desk top publishing or graphics package.

Sources of information: paper-based, electronic, people.

Documents: notice, report, minutes, letters.

##### **Evidence Requirements**

The candidate should produce accurate hard copy from each of the software applications, both before and after making amendments, to show how problems have been solved. Observation of the candidate using a checklist is also required. For each software package a log sheet should be kept, showing the development of the solution.

In making amendments in the spreadsheet file, the amendments should include inserting data, changing formulae and changing layout. In amending the database file, the amendments should include altering the structure, changing layout, editing records, records and searching on multiple (at least 2) fields. In amending the word processing, graphics or desk top publishing file, the candidate should change page size or orientation, change fonts and paginate the document. Evidence of data transfer and integration from spreadsheet to word processing, desk top publishing or graphics package; from database to word processing, desk top publishing or graphics package; and within word processing, desk top publishing or graphics package, between files, should be apparent.

## **National Unit Specification: statement of standards (cont)**

**UNIT** Information Technology for Management (Higher)

### **OUTCOME 2**

Evaluate developments in information technology in relation to management's needs.

#### **Performance Criteria**

- a) The identification of essential features of new developments is accurate.
- b) The comparison of systems and their relative facilities is accurate and relevant to the organisation's needs.
- c) The identification of threats to security is comprehensive.
- d) The impact of the introduction of new technology on the organisation is evaluated.

#### **Note on Range for the Outcome**

Impact on organisation in terms of: size, structure, location of workers, communications.

#### **Evidence Requirements**

Evidence should consist of an extended response based on the evaluation of the introduction of a new technological development and its impact on a given organisation.

### **OUTCOME 3**

Advise on the responsibilities of the organisation in relation to current legislation and good working practice.

#### **Performance Criteria**

- a) The identification of the legal responsibilities of the organisation is accurate.
- b) The interpretation of the rights of the individual and the organisation in relation to specific problems is accurate and is communicated to the appropriate person in an acceptable way.
- c) Confidentiality is maintained at all times.

#### **Note on Range for the Outcome**

Current legislation: Data protection, health and safety, copyright.

#### **Evidence Requirements**

Evidence should consist of an extended response to case study material which should cover the range.

### **OUTCOME 4**

Assess the role of information in decision making.

#### **Performance Criteria**

- a) The nature and importance of information to a business organisation is clearly understood.
- b) The identification of information sources for decision making is accurate.
- c) The description of information systems is clear.
- d) The comparison of the type of information needed at differing levels of decision making is comprehensive.

## **National Unit Specification: statement of standards (cont)**

**UNIT** Information Technology for Management (Higher)

### **Note on Range for the Outcome**

Information sources: primary, secondary, internal, external, qualitative, quantitative.

Information systems: formal, informal, within functional areas, across functional areas.

### **Evidence Requirements**

Evidence should consist of an extended response to case study material which should cover the range.

## **National Unit Specification: support notes**

### **UNIT** Information Technology for Management (Higher)

This part of the unit specification is offered as guidance. None of the sections of the support notes is mandatory.

While the time allocated to this unit is at the discretion of the centre, the notional design length is 80 hours.

#### **GUIDANCE ON CONTENT AND CONTEXT FOR THIS UNIT**

This unit is set in the context of the modern business environment and candidates should be introduced to up-to-date office procedures and practices throughout. Throughout the teaching of the unit, the use of a simulated organisation is to be encouraged. Learning within a particular context is more meaningful to most candidates. This approach could be widened during the unit with candidates being asked to carry out tasks for various departments in the organisation, thus widening their experience of dealing with different contexts. They could, for example, do some work for the Accounts Department and some work for the Human Resource Department, emphasising the common elements between departments within the one organisation and the differences between them.

Links with commerce and industry would be particularly useful to candidates undertaking this unit and centres should be encouraged to link the unit to any work experience or visits. Visits could be organised in a structured way, with different groups of candidates finding out how the organisation deals with some aspects the candidates have already studied.

#### **Outcome 1**

This outcome forms the core of the unit and will take the largest proportion of time. It is anticipated that this will be between 50 and 60 hours depending on the level of information technology experience candidates have on entry to the unit. It may be helpful to use the underpinning knowledge and layouts required for Word Processing 2 (Int 2) and Word Processing 3 (Int 2) to build on existing word processing skills.

In using software and hardware, candidates should have a knowledge and understanding of input and output devices, loading and exiting applications, recalling, amending, saving and producing hard copy in each software application. Candidates should also be aware of back-up and safety procedures, security and confidentiality procedures pertaining to computer data, and different ways of protecting equipment and data.

Candidates should be familiar with and able to use the following effectively as sources of information: CD ROM, the Internet, computer files, remote databases, books, lists, directories and people. Sources should be both internal and external to the organisation. They should know how to research and edit materials.

Candidates should know about the kinds of security and confidentiality procedures followed by organisations. They should know about organisational procedures for copying and storing documents, and legal and regulatory requirements relating to the use and provision of information.

Candidates should be able to identify problems, gather information, produce, implement and modify a strategy for solving problems, and be able to chart progress in problem solving.

## **National Unit Specification: support notes (cont)**

### **UNIT** Information Technology for Management (Higher)

Candidates should be able to choose relevant software to solve problems (within the constraints of software available in the centre) and be aware of the potential of systems being used. Concepts of database management systems should be understood. They should be able to use methods to simplify data entry, interrogation and retrieval, for example, macros, automatic insertion of text, scanners, integration of software packages.

Layout of work should be in accordance with organisational house style or accepted convention. Documents should include letters, memos, notices, agendas, minutes, action minutes and reports.

#### **Outcome 2**

Candidates should be aware of continuing developments and what potential advantages and effects they would have on business with regard to the amount of information available, the speed at which it is available, its accessibility and quality. Means of communication, for example, LANs, WANs, modems, the Internet, e-mail, conferencing, CD ROMs, and other new developments, for example, input devices, communication devices and output devices which are likely to have a major impact on business, should be considered. The effects of new technology should be evaluated in terms of security implications, homeworking, outsourcing, downsizing and restructuring. Candidates should also be aware of how to manage change to minimise detrimental effects on staff.

As this is a constantly changing area, candidates should be encouraged to keep a file on new developments. Any examples given are obviously current but effort should be made to keep the candidates aware of ongoing changes. Candidates should also be able to operate any communication devices in the centre, for example, remote databases, e-mail, the Internet, and should also be aware of costs and be able to draw comparisons between systems.

#### **Outcome 3**

Candidates need to have access to information on current legislation. They are not expected to memorise this information but are required to be familiar with its content and be aware of where further details and clarification might be found on the following topics: data protection legislation, health and safety legislation, particularly with reference to VDUs, and copyright legislation. Summaries of the Acts involved would be suitable source materials for candidates to research. Candidates should also be aware of the kind of organisational procedures required in the workplace, such as security procedures, password and access controls, and how the organisation deals with breaches of procedures and enforcement of legislation.

#### **Outcome 4**

Candidates should be aware of the different levels of decision making - strategic, tactical and operational. They should be aware of the role and importance of information to an organisation; in particular they should be aware of the dramatic growth in forms of information, speed, accessibility, quality and quantity of information and the effect these changes have had on decision making. Sources of information, both internal and external to the organisation, should be examined and, where possible, candidates should use these different sources, both electronically and manually. Methods of processing, such as receiving, checking, sorting, analysing, recording, storing, summarising, comparing, retrieving and transmitting information, should be studied in different functional contexts, for example, in relation to purchasing, sales and personnel records. Channels of communication, both formal and informal, should be discussed.

Structural and functional areas of organisations should be studied and candidates should be able to draw organisation charts and to identify informal networks.

## **National Unit Specification: support notes (cont)**

**UNIT** Information Technology for Management (Higher)

### **GUIDANCE ON LEARNING AND TEACHING APPROACHES FOR THIS UNIT**

Candidates should be encouraged to take a positive attitude towards the quality of their own work throughout this unit, and should be largely self-correcting. Realistic materials and documentation should be used throughout, and a thematic approach adopted where possible. Where the approach is taken to work for one 'organisation', this approach should be used throughout the learning and teaching as well as in the assessment procedures. Where possible, an integrative approach should be taken.

Centres may find it helpful to develop their own organisation which could be based in their local area and retain a local character. If there are already good links with a local employer, it may be possible to base some of the documentation and scenarios on real situations.

### **GUIDANCE APPROACHES TO ASSESSMENT FOR THIS UNIT**

The following are guidelines on the content of the assessment instruments. It is envisaged that all of the outcomes could be assessed in a particular context, for example, an organisation which is currently examining the use it makes of information technology in administration.

#### **Outcome 1**

This assessment consists of a project which could be subdivided into five tasks.

Task 1 consists of setting up a spreadsheet file from researched data to solve a business problem. The solving of this business problem should use a minimum of three different formulae. A minimum of three different amendments should then be made, requiring changes to data, formulae and layout. All of the information should be given to the candidate in the form of a problem.

Task 2 consists of setting up a database file from researched data, including alphabetic, numerical and date fields, to solve a business problem. Test data should be entered in the database file after which there should be a minimum of three amendments made to the file, including an amendment to the structure, a sort on two fields and changes to at least two records. All of the information should be given to the candidate in the form of a problem or case study.

Task 3 consists of setting up a word processing, desk top publishing or graphics file from researched data, which should include the candidate keying in material and importing text, data and graphics from other files. A minimum of three amendments should be made, requiring changes to the page size or orientation of the document, fonts and pagination. All of the information should be given to the candidate in the form of a problem.

Task 4 consists of integrating information using a spreadsheet and a word processing, desk top publishing or graphics package. A minimum of a paragraph should be keyed in, some text or graphics should be transferred from another word processing file and some data should be transferred from a spreadsheet file. The data from the spreadsheet file could be in tabular form or in graphics form or both. The information should be given to the candidate in the form of a problem and the output should be a set of minutes of a meeting, for example, with financial results shown in tabular and graphic form.

Task 5 consists of integrating data using a database and a word processing, desk top publishing or graphics package. The data should be transferred in the format required for a mail merge. A minimum of a paragraph should be keyed in and the use of macros and standard paragraphs should be encouraged. The information should be given to the candidate in the form of a problem and letters should be produced.

## **National Unit Specification: support notes (cont)**

**UNIT** Information Technology for Management (Higher)

### **Outcome 2**

The candidates could be given an extended response question to a case study and asked to evaluate the effect on the organisation of introducing a particular aspect of new technology to the organisation.

### **Outcome 3**

Assessment could consist of an extended response question to a case study or series of small case studies which overtake the range, and require the candidate to identify the responsibilities of the organisation and the rights of an individual in relation to a particular situation.

### **Outcome 4**

Assessment could consist of an extended response question to a case study or real situation where the candidate will have to identify the channels of communication within the organisation, explain them diagrammatically and in written form, and identify what sources of information are likely to be used at each level of decision making.

### **SPECIAL NEEDS**

This unit specification is intended to ensure that there are no artificial barriers to learning or assessment. Special needs of individual candidates should be taken into account when planning learning experiences, selecting assessment instruments or considering alternative outcomes for units. For information on these, please refer to the SQA document *Guidance on Special Assessment and Certification Arrangements for Candidates with Special Needs/Candidates whose First Language is not English* (SQA, 1998).