

ESKIPIM2 (SQA Unit Code - F9AD 04)

Personal information management software



Overview

This is the ability to use software designed for the purpose of managing and organising contacts, appointments, tasks and notes. Software may also be termed Personal Planning software.

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Performance criteria

You must be able to:

Use calendars to schedule appointments and meetings

- P1. Create, edit and delete multiple calendar entries
- P2. Arrange [recurring appointments](#)
- P3. [Invite others to meetings](#) and monitor attendance
- P4. Respond to meeting requests from others
- P5. [Create reminders](#) for calendar appointments and events
- P6. Locate, organise and display [appointments](#) and events as required
- P7. [Import and export](#) calendar data

You must be able to:

Use a task list to prioritise activities

- P8. Create, edit and delete task information
- P9. [Organise and display tasks](#), setting targets for completion
- P10. Monitor [task progress](#) and set reminders
- P11. Report on task status and activity
- P12. Use software features to [work collaboratively](#) on tasks with other users

You must be able to:

Use an address book to store, organise and retrieve contact information

- P13. Create, [update](#) and delete contact information
- P14. Locate, [organise and display contact](#) information efficiently
- P15. Create additional contact lists to separate work and leisure contacts
- P16. [Select and export](#) contact details for use in other applications
- P17. Create and modify a distribution list
- P18. [Share contact information](#) with others responsibly

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Knowledge and understanding

You need to know and understand:

Use calendars to schedule appointments and meetings

K1. Describe how to [share calendars](#) with other users

Use an address book to store, organise and retrieve contact information

K2. Explain why it is important use personal data [responsibly](#) and safely

K3. Describe why and how to keep contact information up to date

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Additional Information

Scope/range

The intermediate user can use a range of personal information management tools and techniques to organise and prioritise their own time and manage multiple tasks and calendars

Example of context: Make one shared calendar for each sports team or club, and a separate calendar for private events; allow various levels of permissions for other users of personal calendars and tasks

Examples of Content

The examples given are indicative of the learning content at each level and are not intended to form a prescriptive list for the purpose of assessment

Use calendars to schedule appointments and meetings

Display appointments: On screen, for print; display style; *filters, views, by category; customise calendar settings; multiple calendars; search and retrieve; public calendars*

Invite to meetings: *Check availability, notify participants; propose alternative times; display other users' calendars; identify conflicts and free time*

Reminders: Set alarms; send reminders to mobile devices and message services; RSS feeds

Import and export: iCalendar, vCalendar; link tasks to calendar; synchronise calendar with mobile device

Share calendars: Multiple calendars, user permission levels, open source and online calendars; subscribe to other calendars. Organise notes: By category, colour, date

Use a task list to prioritise activities

Organise tasks: *By category, status, target date; assign and respond to task requests; filters*

Work collaboratively: Multiple tasks, user permission levels; composite tasks

Task progress: Percentage completion; postpone task

Use an address book to store, organise and retrieve contact information

Update contacts: Multiple entries for single person; automatic updates; assign category

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Organise contacts: By *category*, name, *company*; customise display, *selected fields*; *filters*; *multiple contacts*

Responsible use: Password protection, Respect confidentially; public profiles; trust, data protection

Select and export: Selected fields; selected contacts; for transfer to mobile device, merge with other software

Share contact information: Beam between mobile devices, vcard

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Developed by e-skills UK

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Status Original

Originating organisation e-skills UK SSC

Original URN ESKIPIM2

Relevant occupations Application Support; ICT for users; Information and Communication Technology

Suite IT Users 6.2

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