



## **National Unit specification: general information**

**Unit title:** Prepare Business Documents

**Unit code:** H1N6 10

**Superclass:** AY

**Publication date:** July 2012

**Source:** Scottish Qualifications Authority

**Version:** 01

### **Summary**

This Unit is designed to allow candidates to develop and apply knowledge and skills required to produce simple business documents.

Candidates will develop keyboarding skills which they will apply to the preparation and formatting of content for a range of standard and form templates. Candidates will also develop skills in preparing, formatting and finalising simple business documents in the context of a house style following business standards and conventions.

This Unit is suitable for candidates interested in working in an office environment in a junior capacity, adults returning to education, school-leavers who have not taken Administration at school and candidates wishing to progress to Word Processing Units.

This Unit has been developed as a mandatory Unit of the National Progression Award Administrative Activities at SCQF level 4, but can also be studied as a free standing Unit. Candidates may progress to SCQF level 5 Units in Administration.

### **Outcomes**

- 1 Produce paragraphs accurately.
- 2 Complete templates to produce documents.
- 3 Prepare simple business letters and e-mails.
- 4 Improve keyboarding skills.

## General information (cont.)

**Unit title:** Prepare Business Documents (SCQF level 4)

### Recommended entry

While entry is at the discretion of the centre, candidates would normally be expected to have attained the following, or equivalent:

- ◆ Communications (Level 3)
- ◆ Basic Keyboarding Skills

### Credit points and level

1 credit at SCQF level 4 (6 SCQF credit points at SCQF level 4\*)

*\*SCQF credit points are used to allocate credit to qualifications in the Scottish Credit and Qualifications Framework (SCQF). Each qualification in the Framework is allocated a number of SCQF credit points at an SCQF level. There are 12 SCQF levels, ranging from Access 1 to Doctorates.*

### Core Skills

Achievement of this Course gives automatic certification of the following:

Complete Core Skill	ICT at SCQF level 3
Core Skill component	None

There are also opportunities to develop aspects of Core Skills which are highlighted in the Support Notes of the Unit Specifications for this Course.

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

**Unit title:** Prepare Business Documents (SCQF level 4)

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 SQA.

### **Outcome 1**

Produce paragraphs accurately.

#### **Performance Criteria**

- (a) Key in text from typescript and manuscript.
- (b) Apply correct spacing between paragraphs.
- (c) Apply assistive software facilities to minimise errors.
- (d) Proofread paragraphs to remove errors.
- (e) Follow conventions for line endings, typing of numbers, dates and names.
- (f) Name and save paragraphs securely.

### **Outcome 2**

Complete templates to produce documents.

#### **Performance Criteria**

- (a) Access appropriate standard and form templates.
- (b) Input data to template accurately.
- (c) Name and save completed template securely.

### **Outcome 3**

Prepare simple business letters and e-mails.

#### **Performance Criteria**

- (a) Identify the difference between formal and informal and internal and external communication.
- (b) Prepare a range of simple business letters using a house style.
- (c) Prepare and send a range of e-mails following business conventions.
- (d) Name and save completed documents securely.

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

**Unit title:** Prepare Business Documents (SCQF level 4)

### **Outcome 4**

Improve keyboarding skills.

#### **Performance Criteria**

- (a) Access keyboarding software package regularly.
- (b) Apply software to test speed and accuracy.
- (c) Apply software to increase speed and accuracy.
- (e) Analyse the development of personal keyboarding skill.

#### **Evidence Requirements for this Unit**

Evidence is required to demonstrate that candidates have achieved all Outcomes and Performance Criteria. Written and/or oral recorded and product evidence is required for this Unit.

The assessment will be carried out under open-book, supervised conditions. Candidates can have access to notes and on-line help. The product element of the assessment should be carried out towards the end of delivery.

The candidate will be required to set up at least one form template for Outcome 2. Standard templates from a range of software applications packages should also be used.

#### **Outcomes 1, 2 and 3 — Open-book, supervised conditions**

Outcomes 1 and 2 will be assessed holistically. Candidates are required to provide product evidence. The product will take the form of:

- ◆ Three accurately completed form and standard templates
  - at least one of the templates should be a form
  - at least two different applications software should be used across the three templates (eg presentation, desktop publishing, database or word processing)
  - two of the templates should have two or more paragraphs
  - data should be keyed into at least four fields in the form template
  - the paragraphs to be keyed into the main part of the template should contain at least 100 words and should include names, dates and numbers across the three documents
  - templates should be submitted as a printout or uploaded to a VLE

## National Unit specification: statement of standards (cont)

### Unit title: Prepare Business Documents (SCQF level 4)

- ◆ Two business letters of approximately 200 words will include (across both) a subject heading, a bulleted section and an enclosure indicator
  - letter one should be keyed in from typescript
  - letter two should be keyed in from manuscript which should allow candidates to make decisions about layout (eg information about the recipient should be presented in a paragraph)
  - at least three proofreading marks should be used in each letter
  - letters should be produced on headed paper using a house style
  - letters should be submitted as a printout or uploaded to a VLE
  
- ◆ Two e-mails of approximately 100 words each will be sent to the tutor
  - one should include an attachment and one should be sent to multiple recipients
  - the content of one should be of an internal nature
  - the content of one should be of an external nature
  - e-mails should be evidenced by the production of a screen shot

Candidates will be provided with six scenarios where exchange of business information takes place. Candidates will identify examples of internal and external, formal and informal communication.

Product evidence should be of a business standard and error-free. Re-assessment should be allowed on each individual task and candidates should be given a different task.

#### Outcome 4

Written or oral evidence is required to demonstrate that the candidate has analysed their speed and accuracy development.

## National Unit specification: support notes

### Unit title: Prepare Business Documents (SCQF level 4)

This part of the Unit specification is offered as guidance. The support notes are not mandatory.

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

### Guidance on the content and context for this Unit

Prepare Business Documents is covered by CfA — Business skills @ work and provides links to the National Occupational Standards — BAA211 and BAA213.

BAA211 Produce documents in a business environment:

- ◆ agree the purpose, format and deadlines for the transcription
- ◆ prepare the required resources
- ◆ organise the required content
- ◆ use available technology appropriate to the document being produced
- ◆ produce the document in the agreed style
- ◆ check for accuracy, editing and correcting text as necessary
- ◆ store the document safely and securely in approved locations

BAA213 Prepare text from notes:

- ◆ input text using keyboarding skills
- ◆ format text, making efficient use of available technology
- ◆ clarify text requirements when necessary
- ◆ select the required resource
- ◆ proofread and check formatting of final document
- ◆ present the text in the required format within agreed deadlines

This Unit forms part of the National Progression Award Administrative Activities and Technologies (SCQF level 4) but can also be taken as a free standing Unit. The broad aim of the Unit is to provide candidates with the skills to contribute effectively and efficiently to the processing of information in an office environment in a variety of business types. The skills should equip candidates to input data accurately, to business standards and conventions. It also equips candidates to prepare simple business communication documents, letters and e-mails.

Developing keyboarding skills is integral to the Unit. Most candidates will already have developed keyboarding skills before starting the Unit. Many keyboarding programmes are readily available on the internet which provide a graphical interface with comprehensive lessons on the keyboard and numeric pad. Most offer tests in speed and accuracy. Candidates should be given time during classes to practise and encouraged to spend additional time practising outwith class time. It is anticipated that candidates will improve their skill and will therefore learn to value the discipline of practice.

## National Unit specification: support notes (cont)

### Unit title: Prepare Business Documents (SCQF level 4)

The Unit is designed to develop accuracy in the production of paragraphs which can be used in a variety of documents. Many businesses use bespoke software to process information and produce documents. The expectation on administrative staff is to be able to input text accurately into a template. Administrative staff may also be involved in posting information on social media sites, web pages and blogs which are increasingly used in business.

This Unit is intended to give the candidate an opportunity to work with the most widely used communication documents, a letter and an e-mail. An appreciation of which document to use in a given scenario will give the candidates an understanding of the difference between formal and informal documents and also the difference between external and internal communication. The candidates will develop an awareness of the importance of using a house style to format a letter and that businesses have their own house style which will be dictated by branding and technology. The candidates will learn to use a house style based on accepted layout and conventions.

The wide use of e-mails for formal and informal, internal and external communication will be explored with a strong emphasis on the correct use of language, spelling and grammar and layout. This will help the candidates to differentiate between a personal e-mail and a business e-mail.

### Guidance on learning and teaching approaches for this Unit

The significance of paragraph work should be placed within the context of a wide variety of documents. Candidates should be introduced to paragraphs using Word. Plenty of practice of two or more paragraphs using differing line spacing will allow candidates to understand, for grammatical purposes, the importance of allocating space between paragraphs. The use of spacing before and after paragraph settings should be encouraged. Candidates should be taught how to connect text such as proper names, dates and numbers to ensure line endings are appropriate. Candidates should be encouraged to develop a 'critical eye' for their work and proofread for correct:

- ◆ spelling
- ◆ line endings
- ◆ layout of numbers, dates and times
- ◆ capitalisation of words
- ◆ use of hyphen and dash

The use of assistive facilities, such as spelling and grammar checkers, should be used in conjunction with proofreading. Editing of paragraphs using a variety of proofreading marks will help candidates develop their use of editing tools.

Where possible set up templates using more than one type of software package. This will help make the candidate aware of the use of bespoke software in the workplace and will also provide the opportunity to practice paragraphs in a realistic context.

Before introducing letters and e-mails, time should be spent explaining the difference between formal and informal business documents. It is important candidates are made aware of which documents should be used primarily for internal communication and those used primarily for external communication. The history of how the e-mail has emerged from the memorandum will give candidates an understanding of the layout of the e-mail.

## National Unit specification: support notes (cont)

### Unit title: Prepare Business Documents (SCQF level 4)

A variety of simple letters using a standard layout should be practiced enough to ensure the candidate is able to apply the rules without needing to consult a guide. The use of interactive software on a smartboard can be used to help this process. The layout of the letter should be placed in the context of a house style which follows accepted layouts and conventions of business documents. Elements, such as, subject headings, enclosure indicators, bulleted lists and confidential lines should be introduced and practiced.

All aspects of sending an e-mail should be explained. Plenty of practice should be carried out to ensure candidates are familiar with and able to understand and complete all parts of a standard e-mail. This will include completing the To, CC, BCC and Subject sections, and attaching a file. The use of particular salutations and complimentary closes including signature blocks should be discussed within the context of formal and informal and external and internal communication. Candidates should also be given practice in sending e-mails as high priority and to multiple recipients. Where possible, candidates should use centre e-mail systems but can use Internet based e-mail services. During practice, candidates should be encouraged to send e-mails to each other. This would act as a peer review opportunity, giving the recipient the opportunity to practice proofreading skills.

Candidates should be introduced to a software package which will develop their speed and accuracy in keyboarding skills. Time for regular practice will allow candidates to develop speed and accuracy. It is unlikely that candidates will develop the skill to a level where they will be able to touch type, however, they should be encouraged to strive for this level. The advantages of regular practice, including outwith class-time, should be emphasised. A test, which is documented at the beginning, can be compared to a test taken at the end. This will allow candidates to appraise their own progress; they can discuss the amount of time devoted to practice and the gain (or loss) achieved.

### Essential skills

By adopting the above learning and teaching approaches and/or through the Outcomes and corresponding Evidence Requirements, the Unit should provide candidates with an opportunity to develop the following essential skills for life, learning and work:

**Enterprise** — by analysing the development of their keyboarding skill candidates are given the opportunity to increase their self-awareness and strive for improvement.

**Employability** — the Unit provides opportunity to develop practical skills to industry standards and IT skills.

**Sustainability** — the preference for the uploading of assessment evidence to a Virtual Learning Environment will reduce the amount of paper used.



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

**Unit title:** Prepare Business Documents (SCQF level 4)

### **Guidance on approaches to assessment for this Unit**

In order to assess keyboard development candidates should take a screen print of a speed and accuracy test which candidates should date and save in a secure place. Some software packages offer a certificate, this could also be used for recording evidence. Towards the end of the course the candidate should take another test, the results of the two tests can then be compared. Candidates should give a reflective account of their development, either in written or oral format. Written evidence could take the form of a short paragraph. This would include stating (1) the different scores of the first and final recordings, (2) the dates on which tests were taken and (3) the time spent each week on developing the skill.

Use a themed holistic approach to assess paragraphs, templates, letters and e-mails. This would be best evidenced by the completion of a batch of templates, letters and e-mails. That is, a single assessment with a number of tasks. Templates should be set up using a variety of software packages and letters should be typed using Word. Headed paper should be made available and must be used for letters. E-mails should be sent to the tutor (plus another named tutor) and can be sent using centre e-mail or internet e-mail.

Each document should have no more than two errors. If there are more than two errors candidates will be required to do a re-assessment. E-mails should have no more than two errors.

Examples of errors include, bad line endings, typographical errors, incorrect spacing between paragraphs, incorrect capitalisation and layout of elements on letters and e-mails.

For the product assessment, where candidates reach the Pass criteria but have errors, these should be pointed out and corrective editing discussed. Candidates will not be expected to resubmit. Where candidates fail to reach the Pass criteria a reassessment is required and candidates must be presented with a different set of tasks.

All assessment evidence should, where possible, be uploaded to a VLE. Alternatively printouts will be acceptable as evidence.

### **Opportunities for the use of e-assessment**

E-assessment may be appropriate for some assessments in this Unit. By e-assessment we mean assessment which is supported by Information and Communication Technology (ICT), such as e-testing or the use of e-portfolios or e-checklists. Centres which wish to use e-assessment must ensure that the national standard is applied to all candidate evidence and that conditions of assessment as specified in the Evidence Requirements are met, regardless of the mode of gathering evidence. Further advice is available in *SQA Guidelines on Online Assessment for Further Education (AA1641, March 2003)*, *SQA Guidelines on e-assessment for Schools (BD2625, June 2005)*.

## National Unit specification: support notes (cont)

**Unit title:** Prepare Business Documents (SCQF level 4)

### Opportunities for developing Core Skills

In this Unit candidates will develop skills to prepare business documents from typescript and manuscript.

Candidates will:

- ◆ select and access the appropriate template for completion
- ◆ apply software to develop their keyboarding skill
- ◆ analyse, review and evaluate their keyboarding development
- ◆ explain the difference between formal and informal, internal and external communication
- ◆ create and present letters and e-mails to a business standard
- ◆ launch and use software applications packages
- ◆ name documents using business conventions
- ◆ save documents to a secure environment
- ◆ locate and retrieve documents from a secure environment
- ◆ enter data into a template
- ◆ edit data according to instructions
- ◆ output completed documents by uploading to a VLE

As candidates are doing this Unit they will be developing aspects of the Core Skills in *Communication, Numeracy, Information and Communication Technology (ICT) and Problem Solving*.

This Unit has the Core Skill of ICT embedded in it, so when candidates achieve this Unit their Core Skills profile will be updated to show that they have achieved ICT at SCQF Level 3.

### Disabled candidates and/or those with additional support needs

The additional support needs of individual candidates should be taken into account when planning learning experiences, selecting assessment instruments, or considering whether any reasonable adjustments may be required. Further advice can be found on our website [www.sqa.org.uk/assessmentarrangements](http://www.sqa.org.uk/assessmentarrangements)

## History of changes to Unit

Version	Description of change	Date

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