## Level 3 - Unit 13 - Using E-mail (3 credits)

# Platinum - Unit 13 - Using E-mail

**Relevant LINKS**

BACK TO ITQ UNITS **[1]**

Handbook home page **[2]**

# Overview

**The candidate can use e-mail tools and techniques effectively** in order to manage their e-mail account(s). The candidates will show that they can effectively create and format e-mails using various tools. They can also show that they understand efficiency tools for sending to more than one user and managing their replies. In addition, they need to show an awareness of some of the security issues involved. The candidates will also need to show a good day to day understanding of e-mail management such as use of attachments, automation, and archiving. They also need to understand some of the basic problems associated with e-mail software.

**A work activity will typically be 'non-routine or unfamiliar' because** the task or context is likely to require some preparation, clarification or research to separate the components and to identify what factors need to be considered. For example, time available, audience needs, accessibility of source, types of content, message and meaning, before an approach can be planned; and the techniques required will involve a number of steps and at times be non-routine or unfamiliar.

**Example of context** – an example might be to create a short guide for their school or college to show the basic and advanced features of a particular e-mail application with clear examples to illustrate.

## Example of work at this level **[3] (to follow)**

## Assessor's guide to interpreting the criteria

***General Information***

**QCF general description for Level 3 qualifications**

- Achievement at QCF level 3 (EQF Level 4) reflects the ability to identify and use relevant understanding, methods and skills to complete tasks and address problems that, while well defined, have a measure of complexity. It includes taking responsibility for initiating and completing tasks and procedures as well as exercising autonomy and judgment within limited parameters. It also reflects awareness of different perspectives or approaches within an area of study or work.
- Use factual, procedural and theoretical understanding to complete tasks and address problems that, while well defined, may be complex and non-routine.
- Address problems that, while well defined, may be complex and non-routine. Identify, select

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and use appropriate skills, methods and procedures.  Use appropriate investigation to inform actions.  Review how effective methods and actions have been.

- Take responsibility for initiating and completing tasks and procedures, including, where relevant, responsibility for supervising or guiding others.  Exercise autonomy and judgement within limited parameters information and ideas

***Requirements***

- Standards must be confirmed by a trained Platinum Level Assessor or higher
- Assessors must at a minimum record assessment judgements as entries in the on-line mark book on the INGOTs.org certification site.
- Routine evidence of work used for judging assessment outcomes in the candidates' records of their day to day work will be available from their e-portfolios and on-line work. Assessors should ensure that relevant web pages and files are available to their Account Manager on request by supply of the URL.
- When the candidate provides evidence of matching all the criteria to the specification subject to the guidance below, the assessor can request the award using the link on the certification site. The Account Manager will request a random sample of evidence from candidates' work that verifies the assessor's judgement.
- When the Account Manager is satisfied that the evidence is sufficient to safely make an award, the candidate's success will be confirmed and the unit certificate will be printable from the web site.
- This unit should take an average level 3 learner 50 hours of work to complete.

***Assessment Method***

Assessors can  score each of the criteria N, L, S or H. N indicates no evidence. L indicates some capability but some help still required. S indicates that the candidate can match the criterion to its required specification. H indicates performance that goes beyond the expected in at least some aspects. Candidates are required to achieve at least a S on all the criteria to achieve the full award.

***Expansion of the assessment criteria***

## 1. Candidates will use e-mail software tools and techniques to compose and send messages

### 1.1 I can select and use software tools to compose and format e-mail messages, including attachments

Candidates should be able to show basic competence with the main features of e-mail software packages.

**Evidence:** will be provided by short guides and assessor feedback.

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})(window,document,'script','//www.google-analytics.com/analytics.js','ga'); ga('create', 'UA-46896377-2', 'auto'); ga('send', 'pageview');

**Additional information and guidance**
Candidates should be able to use any desktop or web based e-mail software effectively. It would be useful to have an indication of trying different systems so that it can be shown that a range of skills are evidenced. There are plenty of free software packages and web based ones that can be signed up to for free. It might be useful to compare and contrast these. For example, a full featured e-mail client such as Thunderbird versus something specifically for security such as https://tutanota.com/ [4]Tutanota. What services are essential, and what are only extras. Candidates need to show some basic guides of how they use software, perhaps a guide of a toolbar and what each feature does with some worked examples of their usage in context. It could be useful to create a screen share video of using some of these features. As with the guidance at L2, candidates should be comfortable avoiding proprietary elements such as attachments and use more open and accessible practices where possible.

**1.2 I can explain methods to improve message transmission**
Candidates should be able to prove proficiency with e-mail applications in their practice.

**Evidence:** will be provided by reflective notes and assessor feedback.

**Additional information and guidance**
Candidates should be reasonably advanced user of e-mail systems, whether on mobile devices or more traditional systems. As above, the type and size of attachment will greatly affect how quickly mails can sent and in some cases if at all. While your e-mail client and network might allow large file attachments, this may not be the case with your intended recipient. Since this process takes a great deal of time to carry out (you sending and their system receiving or sending a message that it could not be accepted), it might impact on overall efficiency. If your system gets back a message that the e-mail was rejected, you would need to read through some of the file headers to see the reason.




A best practice might be to use share sites and link to files through the e-mail rather than attach them. This is a 552 error from a receiving mail server and there are a number of possible conditions where it will reject your email such as the recipients mail box is full, illegal attachments etc.

Other aspects of ensuring good transmission are using elements such as flags to improve the way messages are handled, for example adding a priority level and a return receipt request.

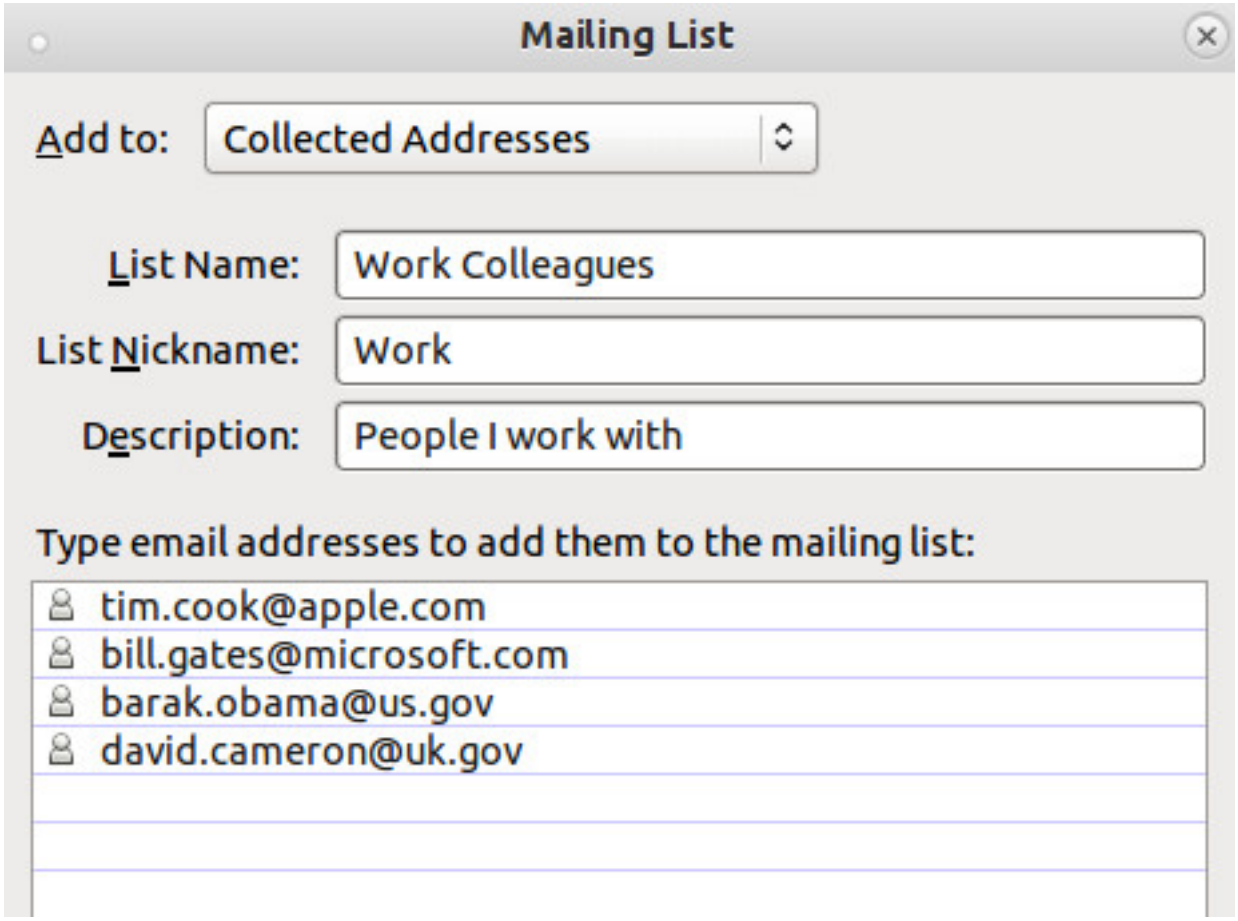
**1.3 I can send e-mail messages to individuals and groups**
Candidates should be able to use the menus to send messages to specific people and include others as required.

**Evidence:** will be provided by guides and assessor feedback.

**Additional information and guidance**

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Candidates should be able to send messages and forward them as required and make sure the correct people are included.  They should be able to explain and give examples of when to use CC and BCC in e-mails.  The should also be able to demonstrate how to set up and use mailing lists and create groups in the e-mail address book.




**1.4 I can explain why and how to stay safe and respect others when using e-mail**
Candidates should be able to understand e-mail dangers and deal with them effectively while also respecting other online.

**Evidence:** will be provided by assessor feedback.

**Additional information and guidance**
Any of the following should prevent the award of this criterion. Candidate sending abusive messages, candidate "spamming" multiple addresses with unsolicited messages, candidate not conforming to any local acceptable use policy, candidate sending inappropriate file attachments, candidate downloading executable attachments or those of an unauthorised nature. This criterion is to some extent about what not to do as much as about what should be done. If the candidate conforms to local principles and guidelines and uses messaging appropriately it is evidence of meeting the criterion. Assessors should check that the candidate can identify spam, unsolicited mail particularly with .exe attachments as potentially dangerous. They should always ask a more experienced user if in doubt about anything they receive by e-mail. They should also identify invitations to meet a stranger physically as a potential danger.

Candidates should be able to understand some of the elements of spam filter software such as these output reports.

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 1.3 RCVD_IN_BL_SPAMCOP_NET RBL: Received via a relay in bl.spamcop.net
                [Blocked - see <http://www.spamcop.net/bl.shtml?94.41.125.120>]
 3.5 BAYES_99               BODY: Bayes spam probability is 99 to 100%
                            [score: 0.9967]
 0.2 CK_HELO_GENERIC        Relay used name indicative of a Dynamic Pool or
                            Generic rPTR
 0.0 TVD_RCVD_IP            Message was received from an IP address
 3.5 HELO_DYNAMIC_SPLIT_IP  Relay HELO'd using suspicious hostname (Split
                            IP)
-0.0 SPF_PASS               SPF: sender matches SPF record
 0.0 HTML_MESSAGE           BODY: HTML included in message
 0.7 MIME_HTML_ONLY         BODY: Message only has text/html MIME parts
 0.9 RAZOR2_CHECK           Listed in Razor2 (http://razor.sf.net/)
 1.0 RDNS_DYNAMIC           Delivered to internal network by host with
                            dynamic-looking rDNS

The original message was not completely plain text, and may be unsafe to
open with some email clients; in particular, it may contain a virus,
or confirm that your address can receive spam.  If you wish to view
it, it may be safer to save it to a file and open it with an editor.
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**1.5 I can use an address book to manage contact information**
Candidates should be able to maintain their own address book effectively, regardless of device.

**Evidence:** will be provided by guides and assessor feedback.

**Additional information and guidance**
Modern e-mail clients will automatically remember e-mail addresses of contacts and so it is arguable that conventional address books are less important in some situations. Smartphones have contacts linked to the e-mail and telephone calling systems. Since there are such a wide range of possibilities, the important issue here is that candidates are in a position to find contact details of regular contacts and maintain them. It is left to the centre to decide the best means for this in the local situation.

For work related systems, it might be useful for candidates to show some level of organisation such as creating categories of contacts.

## 2. Candidates will manage and use e-mail software effectively

**2.1 I can develop and communicate guidelines and procedures for using e-mail effectively**
Candidates should be able to create a user guide for users to follow and help them use e-mail more effectively.

**Evidence:** will be provided directly by user guide.

**Additional information and guidance**
Candidates  should be able to use their skills and knowledge of the different aspects of e-mail good practice to create a user guide for other users.  This can be in a school/college environment or aas part of a local work placement.  Each of these will have different requirements in terms of what can and can't be done.  The guidelines and procedures should cover how to use the system, how to deal with e-mail issues such as attachments and other aspects as necessary.  procedures could discuss how to escalate problems relating to e-mail.

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**2.2 I can read and respond appropriately to e-mail messages and attachments**
Candidates should be able to use the correct procedures as dictated by their guide in 2.1.

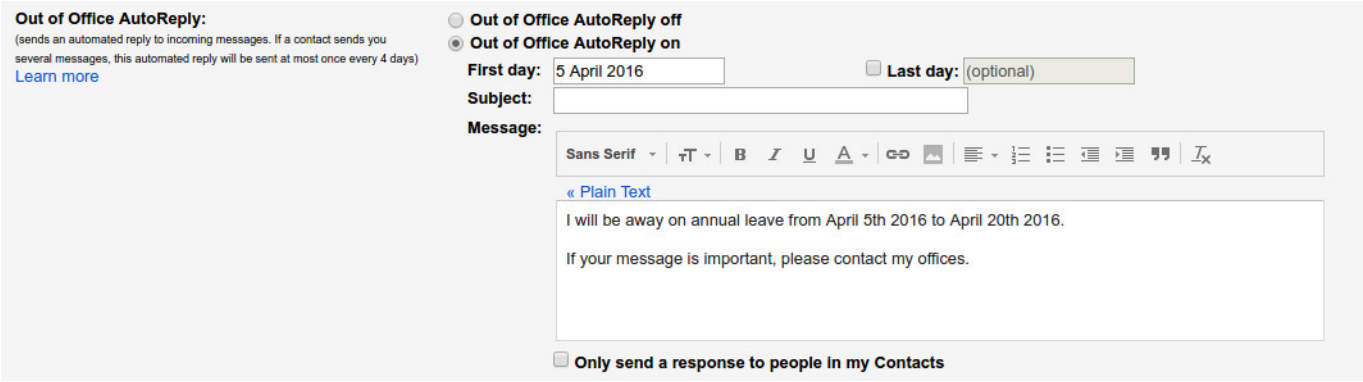
**Evidence:** will be provided by guides and assessor feedback.

**Additional information and guidance**
Candidates will need to "practice what they preach". Some e-mail responses will require and informal language and format and others will be far more formal. They need to be able to show that they can make these determinations as required. They also need to demonstrate that they can assess and deal with attachments as required. Some attachments will need to be managed and organised or perhaps moved to another user. In addition, some attachments will clearly be dangerous and need to be dealt with appropriately.

**2.3 I can use e-mail software tools and techniques to automate responses**
Candidates should be able to demonstrate the ability to know when and how to automate e-mails.

**Evidence:** will be provided by guides and examples in documents.

**Additional information and guidance**
Candidates will sometimes need to use automated responses, the most common being an out of office message.




Other tools need to be demonstrated as appropriate. The guide here [5] shows how to automate messages to be sent as a response to certain types of email coming in, such as sales enquiries. The other guide is making e-mails e sent at certain times. candidates need to explore and test these more advanced features at Level 3.

**2.4 I can explain why, how and when to archive messages**
Candidates should be able to use more advanced e-mail management techniques, particularly archiving.

**Evidence:** will be provided by guides and reflective journals.

**Additional information and guidance**
Candidates should have a detailed understanding of e-mail management. These days, people receive hundreds of e-mails a day and these need to be managed and at some point they need to minimised. Most e-mail on-line systems have limits on how much data can be used, particularly with free services. With broadband services it is easy for people to attach huge video and audio files to e-mail which build up quickly. Candidates need to show ways to archive these. Do they save off the images or videos somewhere else, do they compress the folders, or export them and save them elsewhere. Most e-mail clients have facilities to help with archiving e-mails and various choices, but these need to be understood. In companies, there is also the need to be able to retrieve these at a later date in case they are needed, for example if some legal issue arises where you need to be able

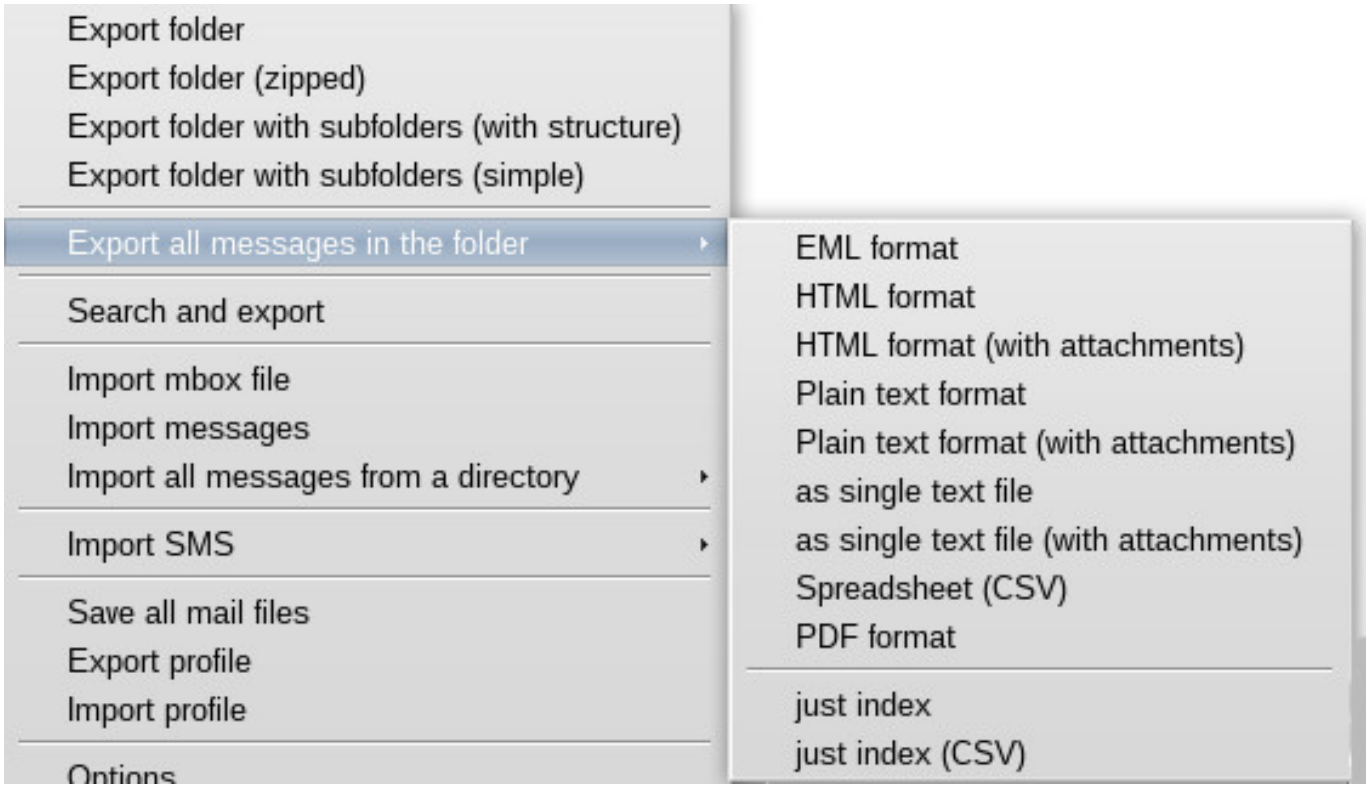
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to access the e-mails for evidence.

**2.5 I can organise, store and archive e-mail messages effectively**
Candidates should be able to demonstrate skill in archiving systems.

**Evidence:** will be provided by guides and reflective journals.

**Additional information and guidance**
Candidates should be able to use tools and add-ons, such as the export add-on for Thunderbird shown below, to organise their e-mail



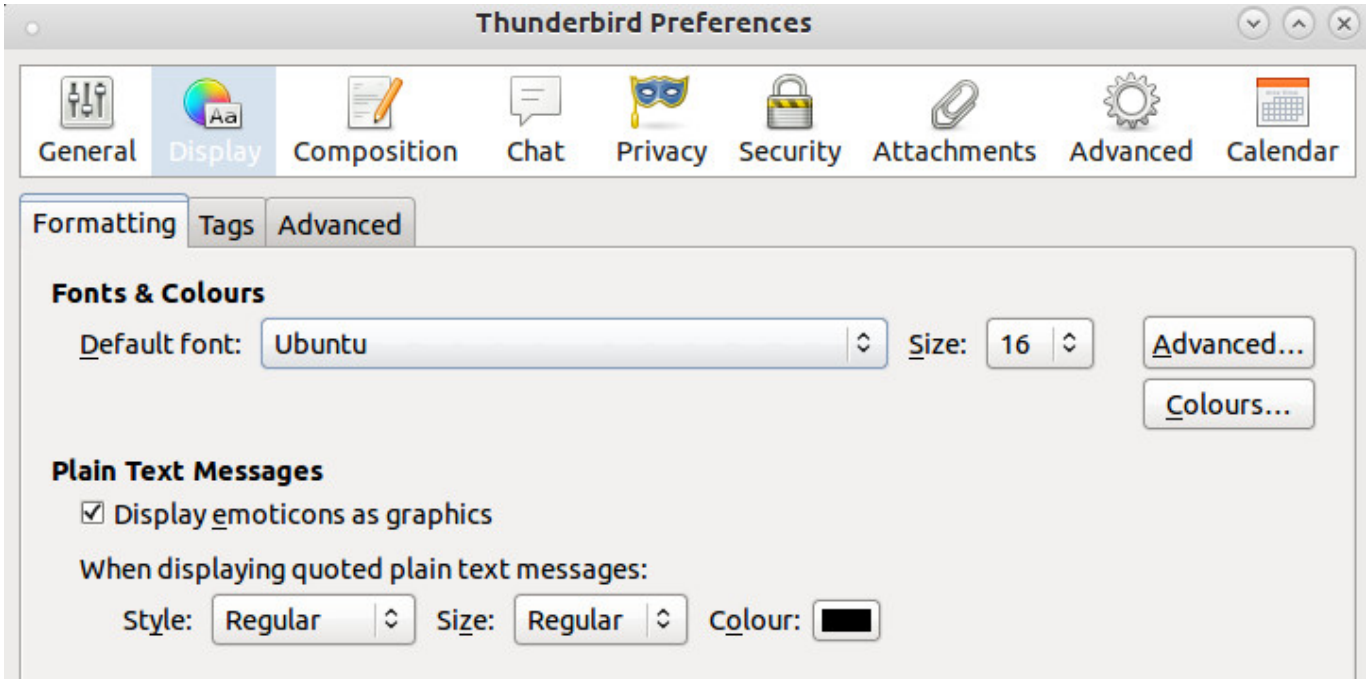

They could also create folders in their e-mail relating to years or particular types of e-mail. They can also employ filters so that all e-mails of a certain kind will always be delivered to specific folders for easier management.

**2.6 I can customise e-mail software to make it easier to use**
Candidates should be able to adapt their software client to their advanced needs.

**Evidence:** will be provided by guides and assessor feedback.

**Additional information and guidance**
Candidates will have different options depending on their particular client software. Some clients, like Thunderbird, will have advanced guides [6] for customisation. Some of the appearance customisations will be part of the operating system being used. The software will also have some options for customisation built in.

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**2.7 I can explain how to minimise e-mail problems**
Candidates should have a good understanding of the main problems that affect e-mail and know what causes them.

**Evidence:** will be provided by guidance notes or reflections on journals or blogs.

**Additional information and guidance**
Candidates don't need to be expert e-mail server administrators, but should know some of the main problems with e-mail systems and be able to explain their main principles. Elsewhere in this guidance it has been discussed about attachment and end-to-end issues, but there are other issues related to connectivity, especially in mixed environments with Ethernet connections and wireless ones. They also need to be competent with other devices such as smart phones and knowing about different levels of data connectivity. many older buildings have thick walls or insulation material which impedes satellite based connections for example and most will be familiar with wi-fi "not spots". Some other issues might be drop outs in signals or incorrectly configured wireless connections. One very common problem is with wrong addresses due to typos, so they need to explain how to be careful and double check addresses to make sure they are accurate. Some email servers require secure certificates to work and they need to explain why this is the case.

**2.8 I can respond appropriately to e-mail problems**
Candidates should be able to solve simple problems and refer more difficult ones to a supervisor.

**Evidence:** will be provided by guides and assessor feedback.

**Additional information and guidance**
A common issue is loss of the internet connection. Candidates should be able to check any necessary physical connection to ensure that it is at least in principle possible to send and receive messages. Beyond this they should refer to their supervisor or technical support. They should appreciate that it is important to communicate the circumstances around problems clearly and that "its not working" is not likely to help a more experienced user fix the problem. Encourage them to recall what they were doing at the time they noticed the fault and whether what they were doing could be related to it.

***Moderation/verification***

The assessor should keep a record of assessment judgements made for each candidate and make

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notes of any significant issues for any candidate. They must be prepared to enter into dialog with their Account Manager and provide their assessment records to the Account Manager through the on-line mark book. They should be prepared to provide evidence as a basis for their judgements through reference to candidate e-portfolios and through signed witness statements associated with the criteria matching marks in the on-line markbook. Before authorizing certification, the Account Manager must be satisfied that the assessors judgements are sound.

**Source URL:** https://theingots.org/community/sil3u13x

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[6] https://support.mozilla.org/en-US/products/thunderbird/tips-and-tricks

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