Gold - Unit 13 - Using Email

Relevant LINKS

BACK TO ITQ UNITS **[1]**

Handbook home page **[2]**

Overview

This is the competence to send and receive electronic messages and information. The candidate can understand and use a range of
basic e-mail software tools to send, receive and store messages for straightforward or routine activities. Any aspect that is unfamiliar will require support and advice from others. E-mail tools and techniques will be defined as ‘basic’ because:

- the software tools and functions will be pre-determined or commonly used
- the techniques used will be familiar or commonly undertaken.

An activity will typically be ‘straightforward or routine’ because:

- the task or context will be familiar and involve few factors (for example, time available, audience needs, content, structure)
- the input and output of information will be pre-determined by the person supervising the task.

Examples of context: Sending an email to request information on a product or service; create inbox folders or labels to organise messages

Activities supporting the assessment of this award **[3]**

Assessor's guide to interpreting the criteria

General Information

QCF general description for Level 2 qualifications

- Achievement at QCF level 2 (EQF Level 3) reflects the ability to select and use relevant knowledge, ideas, skills and procedures to complete well-defined tasks and address straightforward problems. It includes taking responsibility for completing tasks and procedures and exercising autonomy and judgement subject to overall direction or guidance.
- Use understanding of facts, procedures and ideas to complete well-defined tasks and address straightforward problems. Interpret relevant information and ideas. Be aware of the types of information that are relevant to the area of study or work.
- Complete well-defined, generally routine tasks and address straightforward problems. Select and use relevant skills and procedures. Identify, gather and use relevant information to inform actions. Identify how effective actions have been.

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- Take responsibility for completing tasks and procedures subject to direction or guidance as needed.

Requirements

- Standards must be confirmed by a trained Gold 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 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 2 learner 40 hours of work to complete.

Assessment Method

Assessors can score each of the criteria L, S, H. N indicates no evidence and is the default starting position. L indicates some capability but secure capability has not yet been achieved and some help is 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 S on all the criteria to achieve the unit.

Expansion of the assessment criteria

1. 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 demonstrate competence in using basic editing facilities in an e-mail client.

Evidence: E-mail content composed by the learner, centre devised test or task.

Additional information and guidance:
Most e-mail clients use HTML but some are still plain text. Where formatting issues arise from use of HTML the client software usually has a button for removing styles and candidates should be aware of this. SMS text messaging is an e-mail system. Some smartphones have input systems such as Swype to aid the speed of text input and editing, Candidates should demonstrate the competence to input text into messages with reasonable efficiency. E-mail can be used formally and informally. Candidates should be beginning to differentiate situations where formal and informal writing is appropriate. SMS shorthand is appropriate for informal communications with people they know will accept it, simple clear language and punctuation should be used in all other situations. Any attachments must bear in mind the intended audience as large files may not be deliverable to certain people on low speed connections. Increasingly messaging systems and the internet enable links to be made from text messages to other information. We are in a period of transition from desktop computer systems to mobile technologies and web-based information. For this reason we should not be too rigid about the interpretation of this criterion in terms of standard file attachments. If the candidate links text in the message to web pages or downloadable files, this should be accepted as appropriate evidence. Candidates should be beginning to appreciate that sending very large files by attachment is not desirable and that files in proprietary formats might not be readable by their target audience. They should wherever possible use information in open file formats. As a specific example a link to information in a web page is readable by any browser on any computer, an e-mail with a .pub file attachment assumes that the receiver will have MS Publisher in order to read the file. Same with .PSD for Photoshop documents, .ppt for PowerPoint. While there might be readers

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for these or conversion filters, it is simpler to use open formats and the web where possible. A link to a presentation in Google Apps might be a much better way of sharing the information that a .ppt attachment. For this reason we want to encourage the flexibility of improving better practice through a broad interpretation of "attachment".

1.2 I can determine the message size and how it can be reduced

Candidates should show practical competence in making messages deliverable by considering the overall size and bandwidth restrictions.
Evidence: Assessor observations, locally devised controlled tasks or tests, example messages created by the user.

Additional information and guidance
Candidates should be able to demonstrate that they know how to deal with large messages by making such things as attached files smaller. if they are sending a colleague some image files, it would be better to use a standardised zip program to compress the images into one folder. They should be able to demonstrate that they know the overall message size, including ant attachments, and can therefore deal with the issue before it becomes someone else's problem.

1.3 I can send e-mail messages to individuals and groups

Candidates should show competence in sending e-mail messages.
Evidence: Assessor observations, sent lists, centre devised test or task.

Additional information and guidance
Candidates should be competent in using the To and other fields e,g, CC and BCC appropriately when sending e-mail. They should be able to forward a message.

1.4 I can describe how to stay safe and respect others when using e-mail

Candidates should be aware of key issues related to safety and acceptable use of e-mail.

Evidence: Assessor observations, centre set task or test.

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.

1.5 I can use an address book to organise contact information
Candidates should demonstrate the competence to maintain a simple address book

Evidence: Populated address book with contact information

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.

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2. 2. Manage incoming email effectively

2.1 I can follow guidelines and procedures for using e-mail
Candidates should be able to follow a list of procedures or simple guidelines including any locally set acceptable use policy.

Evidence: Assessor observation and checks.

Additional information and guidance
Simple guidelines might include

- Not responding to "Spam"
- Notifying a supervisor if potential virus attachments are received
- Not sending unsolicited messages
- Deleting spam and keeping inbox tidy
- Not sending attachment greater than a specific size
- Not receiving and sending personal messages at work.

This is illustrative and assessors will need to adjust this to fit local circumstances.

2.2 I can read and respond to e-mail messages appropriately

The candidate should be capable of reading messages that are in simple clear English and make an appropriate response on the basis of the content and sender.

Evidence: Assessor observation local tests or tasks.

Additional information and guidance

This criterion is related to 2.1. 2.1 is about identifying the type of message and the type of response. 2.2 is about understanding the details of the message and making the actual response. It is likely that both criteria will be assessed concurrently.

2.3 I can use e-mail software tools and techniques to automate responses

The candidate should be capable of using tools in order to make their work more efficient, such as automation.

Evidence: Assessor observation local tests or tasks.

Additional information and guidance

Some responses to e-mail do not require a manual intervention, or some e-mails come with a flag which requires the user to acknowledge the receipt. In other instances, it may not be possible at that moment to deal with an e-mail. Candidates need to show an awareness of some of these more subtle aspects of e-mail clients and demonstrate that they know how and when to apply them. They should be able to create an auto-responder to the effect that they are aware of an e-mail and will deal with it in a suitable time frame, or perhaps a holiday response e-mail. Many people that work in a sales role in a company will be on the road between companies and not in the position to deal with e-mail "live". An out of office automatic response means that the possible client at least knows that they will be dealt with.

2.4 I can describe how to archive e-mail messages, including attachments

The candidate should be able to identify messages that are not needed or no longer needed to keep their message are tidy.

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Evidence: Message area containing important messages and free from obvious spam and un needed mail.

Additional information and guidance

Although storage space is not much of an issue these days (might not be true in some places) having a lot of clutter makes useful messages less easy to find. Spam filters do a good job of removing much of the noise but some junk mail still gets through, or some mail may be classed as junk and missed. Candidates should be prompted regularly to delete mail and understand that it is possible to un-delete accidentally deleted mail. Periodically they can permanently remove deleted items when they are certain they will not be needed again. Deleting messages with large file attachments is a good idea if they are not needed particularly if storage space is limited.

2.5 I can organise, store and archive e-mail messages effectively

The candidate should be able to organise messages into folders or under labels

Evidence: Assessor observations, user e-mail area.

Additional information and guidance

Candidates should be able to organise their e-mail so that it is manageable. They should not be complaining about the volume of e-mail they get e.g. from a mailing list when they can simply filter that into a folder and delete it all quickly and simply as required. If the e-mail client has archiving facilities they might use these especially if the email message space is limited. With modern web mile and gigs of free storage this is a lot less necessary than it used to be. Assessors should make a judgement in relation to local conditions whether or not the candidate has practical competence in keeping their e-mail manageable in terms of finding and referring to messages sent previously to them.

2.6 I can respond appropriately to e-mail problems

The candidate should be able to solve simple problems and refer more difficult ones to a supervisor.

Evidence: Assessor observations, simple tests and tasks.

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 notes of any significant issues for any candidate. They must be prepared to enter into dialogue 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. Before authorizing certification, the Account Manager must be satisfied that the assessors judgements are sound.

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