## Contents

<table>
<thead>
<tr>
<th>Unit</th>
<th>Business resources</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Use office equipment</td>
<td>9</td>
</tr>
<tr>
<td>2</td>
<td>Maintain and issue stationery stock items</td>
<td>28</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit</th>
<th>Communications</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Use a diary system</td>
<td>40</td>
</tr>
<tr>
<td>4</td>
<td>Take minutes</td>
<td>52</td>
</tr>
<tr>
<td>5</td>
<td>Communicate in a business environment</td>
<td>75</td>
</tr>
<tr>
<td>6</td>
<td>Use electronic message systems</td>
<td>106</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit</th>
<th>Core business &amp; administration</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>Manage own performance in a business environment</td>
<td>121</td>
</tr>
<tr>
<td>8</td>
<td>Improve own performance in a business environment</td>
<td>139</td>
</tr>
<tr>
<td>9</td>
<td>Work in a business environment</td>
<td>154</td>
</tr>
<tr>
<td>10</td>
<td>Solve business problems</td>
<td>182</td>
</tr>
<tr>
<td>11</td>
<td>Work with other people in a business environment</td>
<td>200</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit</th>
<th>Customer service</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>Meet and welcome visitors</td>
<td>216</td>
</tr>
<tr>
<td>13</td>
<td>Handle mail</td>
<td>231</td>
</tr>
<tr>
<td>14</td>
<td>Provide reception services</td>
<td>248</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit</th>
<th>Document production</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>Produce documents in a business environment</td>
<td>264</td>
</tr>
<tr>
<td>16</td>
<td>Prepare text from notes</td>
<td>284</td>
</tr>
<tr>
<td>17</td>
<td>Prepare text from notes using touch typing (40 wpm)</td>
<td>305</td>
</tr>
<tr>
<td>18</td>
<td>Prepare text from shorthand (60 wpm)</td>
<td>331</td>
</tr>
<tr>
<td>19</td>
<td>Prepare text from recorded audio instruction (40 wpm)</td>
<td>354</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit</th>
<th>Events and meetings</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>Support the organisation of an event</td>
<td>376</td>
</tr>
<tr>
<td>21</td>
<td>Support the coordination of an event</td>
<td>392</td>
</tr>
<tr>
<td>22</td>
<td>Support the organisation of business travel or accommodation</td>
<td>405</td>
</tr>
<tr>
<td>23</td>
<td>Support the organisation of meetings</td>
<td>421</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit</th>
<th>Innovation and change</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>24</td>
<td>Respond to change in a business environment</td>
<td>435</td>
</tr>
</tbody>
</table>
### Manage information and data

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>25</td>
<td>Organise and report data</td>
<td>451</td>
</tr>
<tr>
<td>26</td>
<td>Research information</td>
<td>467</td>
</tr>
<tr>
<td>27</td>
<td>Store and retrieve information</td>
<td>484</td>
</tr>
<tr>
<td>28</td>
<td>Archive information</td>
<td>499</td>
</tr>
<tr>
<td>29</td>
<td>Support the management and development of an information system</td>
<td>517</td>
</tr>
</tbody>
</table>

**Index**

<table>
<thead>
<tr>
<th>No.</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>535</td>
<td></td>
</tr>
</tbody>
</table>
1 Use office equipment
‘Use office equipment’ is an optional unit which may be chosen as one of a combination of units to achieve a Qualifications and Credit Framework (QCF), National Vocational Qualification (NVQ) or Scottish Vocational Qualification (SVQ).

The aims of this unit are to:

- Know about different types of office equipment and its uses
- Understand the purpose of following instructions and health and safety procedures when using office equipment
- Understand how to use office equipment in a way which minimises waste
- Know about the different types of problems that may occur when using office equipment and how to deal with them
- Understand the purpose of meeting work standards and deadlines when using office equipment
- Understand the purpose of leaving office equipment and the work area ready for the next user
- Be able to use office equipment

To achieve the above aims of this unit, learners will be expected to provide evidence through the performance of work-based activities.

Knowledge

There are many different types of office equipment that are used to produce materials of high quality when working in a business. The types of office equipment in any business will vary from organisation to organisation, which will be determined by the particular culture of that organisation. There are three categories of office equipment:

- **Personal office equipment** - Office equipment that each employee will have. They will have personal responsibility to organise, manage and operate this office equipment

- **Shared office equipment** - Office equipment to which all employees have access to. This may have a dedicated team to organise and manage some of the resources for its use
• **Specialised office equipment** - Office equipment that is highly specialised and would only be used by a few employees within an organisation. This kind of office equipment may have a dedicated team to organise and manage resources for its use.

Each organisation will have its own procedures for dealing with office equipment and how to resolve any problems, if they occur. However, all organisations will have manufacturers’ manuals for each piece of office equipment and their employees will be expected to follow these as part of their induction and continued training. Employees will always be expected to uphold health and safety procedures when using office equipment.

**ACTIVITY 1**
What are the three different categories of office equipment?

**Personal office equipment**

Every employee within an organisation will have some office equipment that falls under their responsibility. They will organise any resources required for their office equipment to carry out their business responsibilities. They will usually operate this office equipment without any supervision. Types of personal office equipment include:

**Security systems**

Depending on the organisation, employees may have to switch off / on a security system to enter / leave a building or office to leave it secure. They may have passes that need to be swiped to gain access to the building or specific office spaces which require a high level of security.

**Desks and chairs**

All employees will have some working space which is theirs, if not a desk. However, there are some organisations that operate a hot-desk system, where employees do not have their own desk but will share an office space and take whatever desk is available when they want to use it. Desks vary
greatly in size and shape. Desks can be built-in desks that can be adjusted, added to or have pieces removed. These types of desks allow for a lot of customisation and maximise limited office space. There are also the more traditional, free-standing desks. Office chairs are very important. As most employees spend 90% of their time at a computer they need a comfortable and supportive chair to avoid back injuries. Desks will also house day-to-day items: pens, pencils, post-it notes, paperclips, elastic bands, notebooks, tacks, pins, stapler and staples etc. Some organisations have a clear-desk policy, which means everything that has been on the desk during the working day has to be tidied away at the end of the day so the desk is clear of any material.

**Personal computers (PCs) or laptops**

This is the main piece of office equipment that every employee will use. It will be set up with software which will allow an employee to write letters, sort and store documents, prepare presentations etc. It may also be connected to the Internet, which allows employees to search for information outside of the organisation - subject to certain restrictions, depending on organisational policy. Computers may be PCs that come with an external hard drive or laptops that come with a built-in hard drive. There are a number of electronic devices that can be connected externally to a PC:

- **Printers** - Provide a hard, paper copy of the information held on a PC
- **Scanners** - Used to enter text or images of data into a PC from a hard copy
- **Speakers or earphones** - Allow audio to be heard, though most PCs will have built-in speakers
- **Memory sticks** - Allow information to be stored as a back-up to a PC’s hard drive. They are portable and allow information to be transported outside the organisation by an employee
- **Projectors** - Allow images to be projected onto a wall or screen for an audience to view either at meetings or presentations, including conferences etc.
- **Digital cameras** - Download images of data onto a PC
It is essential to use technology in a sustainable way. To make sure a business is sustainable and to lessen the carbon footprint of an organisation, PCs should:

- Set monitors to switch off after periods of inactivity, rather than relying on a screen saver
- Be set to go into standby mode after 10 minutes of inactivity
- Be set to hibernate mode after 30 minutes of inactivity
- Be switched off if they are sitting inactive for long periods

Be switched off at the end of every day, including other peripheral devices, e.g. printers

The above may vary depending on the program the organisation has chosen to use.

**ACTIVITY 2**
What are some of the electronic devices that can be attached to a PC? Why would these electronic devices be used?

**Telephones**

Most employees will have a telephone on their desk. These will vary in the functions they are programmed to deliver depending on the system being used by an organisation. Some of them can be quite complex in the functions they offer. Many managers will also have a mobile phone, e.g. BlackBerry, iPod, which can function as a PC and provide instant access to their internal and external customers. They also allow the user to send text messages and leave voice messages.

**Calculators**

These can carry out a wide range of calculations. This function is also built into a PC and other electronic equipment, where it is easy to keep a record of the calculation.

**Shared office equipment**

Shared office equipment is office equipment that everyone in the office will share and use depending on their needs. It is office equipment that every employee will have access to. This may have a dedicated team to organise
and manage some of the resources for its use. The types of shared office equipment are:

**Printers / photocopiers**

An employee’s PC will be connected to the office printer / photocopier. Most offices will have a combined printer / photocopier, but they can be separate. A combined printer / photocopier will print documents or copy documents. Depending on the complexity of the printer / photocopier, it can provide many functions that are fast and cost-effective, e.g. giving all employees a code number to access printing, which then allocates the printing to specific cost centres. Using a PC program, print jobs can be tailored to an employee’s needs, e.g. print on both sides of the paper etc. Photocopiers have many functions, which include:

- Enlarging copies
- Reducing copies
- Producing multiple copies
- Collating and stapling documents
- Producing double-sided copies
- Producing colour copies
- Some managers may have a private printer in their office to allow them to print off private and confidential material

Before starting a print run, make sure the printer / photocopier is stocked with paper and has sufficient toner or print cartridges.

**ACTIVITY 3**

What functions can a printer / photocopier perform?

**Fax machines**

A fax machine transmits a copy of an original document via a telephone line to a receiver. To use a fax machine the required fax number is dialled and the start button pressed. A copy of the original will appear at the other end of the transmission to the receiver. Most fax machines will automatically print incoming faxes. As with printers / photocopiers, make sure the fax machine is stocked with paper and has sufficient toner or print cartridges. A PC can be set up to fax directly to a fax machine rather than printing out and using a fax machine - this saves time and paper.
Shredders

Shredders are used to manage the disposal of private and confidential documents, which cannot just be thrown away or recycled. With identity theft on the rise, it is critical to shred sensitive documents. A shredder will cut the paper into strips or squares, which makes it difficult to reassemble. Care must be taken not to get clothing or hair trapped in a shredder. Shredders can vary in the number of pieces of paper it can shred.

ACTIVITY 4
Which piece (s) of office equipment would be used to?
1. Add together a table of figures
2. Produce 500 copies of a letter
3. Stamp envelopes and parcels
4. Bind a document in plastic covering
5. Produce a letter
6. Dispose of private and confidential documents

Specialised office equipment

Specialised office equipment may not be used very often or by many employees within the business, or it may require specialised skill and knowledge to use. This kind of office equipment may have a dedicated team to organise and manage resources for its use.

Digital projectors

A digital projector will only be used for meetings or presentations where it is important to share detailed information with an audience. This is usually attached to a PC. A digital projector, also called a digital projection display system, is a specialised computer display that projects an enlarged image onto a screen. A digital projector may also project three-dimensional (3-D), interactive, full-motion audio-visual files on a PC screen.
Videoconferencing

Videoconferencing is a communications technology that is used to integrate video - the visual image - and voice to connect users from different locations with each other in real time. It allows the transmission of natural conversations. Communications can be as simple as a conversation between two people at different sites or involve several sites and groups of people in large rooms. Videoconferencing can also be used to share documents and information displayed on a computer screen and whiteboards. To use a videoconferencing system, the following components are required:

- **Video input** - Video camera or webcam
- **Video output** - Computer monitor, television or projector
- **Audio input** - Microphones, CD / DVD player, cassette player or any other source of preamp audio outlet
- **Audio output** - Usually loudspeakers associated with the display device or a telephone
- **Data transfer** - Analogue or digital telephone network, LAN or Internet

Audio teleconferencing

Audio teleconferencing, or a conference call, is a telephone call that connects users in different geographical locations in real time. Conference calls may be designed either for all users to participate in or limited to a few users. Participants in a conference call will join in by dialling a given number which will then have access codes that need to be dialled in. This will connect to a ‘conference bridge’, which is a specialised type of equipment that links telephone lines. Businesses usually use a specialised service provider which maintains the conference bridge or provides the phone numbers and PIN codes that participants dial to access the meeting or conference call. As well as using normal telephones, there are also specially designed phones for conference calling. Whoever organises a conference call will need to make sure that all users know in advance the time of the conference call, the telephone number to call and
the PIN numbers to use. They will usually give users an emergency telephone number to use in the event of any problems.

**ACTIVITY 5**
When would audio-teleconferencing and videoconferencing be used?

**Franking machines**

Franking machines are issued with a licence from Royal Mail. Franking is a quick and easy way to manage an organisation’s mail. It can save time and money. It can also project a more professional image of a business. It can be paid for using credit with Royal Mail, as and when it is needed by a business. Franking machines can be used by any type or size of business. There are no restrictions on minimum or maximum postage volumes and there are discounts for franked mail per item. Franking machines can be used to post items using most Royal Mail services, including First Class, Second Class, Recorded Delivery, Special Delivery, Cleanmail, Mailsort, ParcelForce Worldwide Services, International Signed For, Airmail etc. Franking machines vary in size and type. Franked mail can be handed in at a local Post Office or Mail Centre, posted in a franked postbox or picked up by Royal Mail. Care must be taken when using a franking machine, as any mistakes cannot be corrected. Once the franking is printed, the credit has been used. Always check before processing the frank that the correct amount of postage is used.

**ACTIVITY 6**
When would a franking machine be used?

**Whiteboards**

Whiteboards are a quick and easy way to demonstrate points or take notes during a meeting or brainstorming sessions. Whiteboards have various accessories depending on the model of whiteboard being used, e.g. erasers and markers. Whiteboards can be wall mounted or come with stands and wheels. The type of whiteboard required will depend on the office and resources.
Laminators

A laminator will protect a document by encasing it between two pieces of plastic which are sealed together. The document will be protected from water damage, tearing etc. Examples of items that may be laminated include telephone lists, training notes, glossy prints, photos, maps etc. Laminators may be either manual machines or electric automatic machines capable of producing bulk laminates.

Binding machines

A binding machine will bind together pages of a document for presentation to an audience at a meeting. The bound document presents a professional finish to a document. There are many different types of binding machines, including coil, comb, click, strip, thermal and wire. Different binding machines can bind different numbers of sheets.

Using office equipment

Office equipment should be used as efficiently as possible. If a piece of office equipment is unfamiliar, either ask for help from someone who knows how to use it or ask the specific team who may have overall responsibility for the equipment or read through the manufacturer’s manual.

The manufacturer’s manual will outline the best way of using the office equipment. Reading the manual is not the last resort to figure out how to make a machine work. A lot of time can be saved by reading the manual before starting to use the office equipment. A manual will also contain vital safety and operating information. If this information is ignored, it may cancel the warranty if something goes wrong. There may also be a number of functions or time-saving features that will not be discovered by chance. Keep the manual close to the piece of office equipment so it can be referred to. The manufacturer’s manual will also set out how to maintain the office equipment. If it is a complex piece of office equipment, specific training may be required. Only use specific office equipment when fully competent to do so.
The manual will also outline how to deal with specific problems related to the office equipment. This may include a helpline number to call or addresses of service centres. Report any problems to the office manager first. Office equipment should only be repaired by qualified service engineers.

Most office equipment will need some resources. These may include:

- **Paper** - This comes in a range of quality and is measured by weight. It includes headed, letter, copy and photographic paper. Use the right quality of paper for the intended audience.

- **Envelopes** - Letters to external addresses will need good-quality envelopes, e.g. with transparent windows to show the address typed on the letter. Internal memos may be sent using internal envelopes which can be used a number of times. Always consider the right size of envelope for what is being sent. Documents with several pages should be placed flat in an envelope.

- **Cartridges** - Used in ink-jet printers. They come in black, multicolour, single-colour and photo-quality versions.

- **Toner** - Used in laser printers and photocopiers, available in black and single-colour versions.

- **Ribbons** - Used in dot matrix printers, printing calculators, fax machines and typewriters.

- **Labels** - Used in franking machines for letters and parcels which are too bulky to frank. Computer printers use address labels, file labels etc. Specially printed labels are used in laminators to create security passes, visitor passes etc.

- **Pouches** - Used in laminators to protect the contents.

- **CD-ROMs / DVDs** - Used to store information.

**ACTIVITY 7**

*What are the common resources used in an office?*

The manufacturer will recommend particular resources to be used with their machine. These should be used wherever possible. Use of non-standard resources may also cancel the manufacturer's warranty or stop the equipment working as well as it can.

A well-maintained piece of office equipment will always perform better than one that is not maintained well. Always make sure that the health and safety procedures for each piece of office equipment are followed. This will make sure that the piece of office equipment is kept in good condition. This will
also help to minimise injury, minimise repair or replacement costs and make
sure the office equipment is ready for the next user to use.

Try to minimise the production of unwanted copies of materials when using
any piece of office equipment. Check the functions of a piece of office
equipment will produce the required results. Perhaps the biggest source of
waste in most organisations is paper. Before initiating a print run, print off
one copy of the page and check it. If satisfied with the quality of the print
then go ahead and print a large number of copies. Resources for office
equipment can be expensive, so make sure as few resources are wasted as
possible. Careful storage will also prevent waste through damage. Almost all
waste produced by using office equipment can be recycled, e.g. pieces of A4
paper can be cut in half or quarters and used as notepads. In some cases
this saves money on new products or replacements.

It is important to use a piece of office equipment for the purpose for which it
has been designed. Despite the best intentions to follow a manual and
accept advice from office colleagues, problems can arise:

- **The piece of office equipment does not work** - If it is an electric
  piece of office equipment, check to make sure it is switched on. Check
  the mains are switched on as well. If it is still not working, look on the
  piece of office equipment to see if it is indicating where the problem is
  occurring. If so, follow the instructions it is giving. Many printers /
  photocopiers will give a step-by-step process of where the problem is
  occurring and what to do to eliminate it, e.g. with paper jams. If
  following the steps does not resolve the problem, consult with the
  office manager. It may have broken down and the manufacturer will
  need to send out a technician to fix it. Never attempt to repair a piece
  of office equipment, particularly if it is electrical or electronic

- **No paper in the paper bins** - Check the printer / photocopier to make
  sure the paper trays are fully stocked

- **Printing may be corrupted because the printer / photocopier has run out of
  ink** - Replace the ink cartridge. Check with the office
  manager for advice on how to install a new ink cartridge

- **Use of incorrect resources for a piece of equipment, which disables it** - Stop the piece of equipment immediately and review what
  has happened. If unable to fix the problem, consult with the office
  manager or technical support team
As a first resort to resolving any problems with office equipment, check the manufacturer’s manual, as it will troubleshoot problems and offer solutions for how to deal with them. If this still does not provide a solution, consult with the office manager or technical support team. When using office equipment make sure that all the instructions on how to use the equipment are known. If not, either check the manufacturer’s manual or consult with the office manager. Any job needs to be completed in accordance with organisational procedures, to the standard of work required and agreed with the person for whom the work is being done. If not, this can lead to a waste of resources, time and money. It will also undermine confidence in the ability to perform tasks using office equipment in the future.

If any agreed task which is to be completed using office equipment is not going to be met on time, for whatever reason, it should be reported immediately so a new priority can be agreed. Doing this helps to maintain confidence in a team. It can also be a lesson learned, which can be followed by other team members in the future, empowering employees to take more responsibility for their own learning.

**ACTIVITY 8**

*What are some common problems found when working with office equipment?*

After completing any piece of work using office equipment leave the equipment in good working order and ready for the next user to use:

- Do not leave a paper jam in a printer / photocopier for the next user to resolve
- Take the original documents out of the photocopier
- Do not leave paperclips or pieces of paper on the photocopier
- Replace the telephone handset on its base
• Leave the franking machine set on the minimum value
• Make sure paper is stored flat and tidily
• Refill the printer / photocopier with paper, if required
• Replace an ink cartridge
• Make sure the meeting room has been cleared of teleconferencing or videoconferencing equipment

If a resource runs out, make sure the person who is responsible for ordering replacements has been told to order more of that resource. It is important to know who this person is in the office. This may require some observation well in advance of a task, e.g. if a print run is planned tomorrow and there is only one ream of paper left.

All office equipment will operate better if it is kept clean. Office equipment should be kept clean enough to meet health and safety requirements. Some will have self-cleaning functions. Most will have instructions in the manual on how to keep them clean. Follow these instructions to keep the equipment clean and hygienic. Care should be taken when cleaning particular pieces of office equipment. For example, do not attempt to clean electrical equipment using water. Office equipment such as telephone handsets and keyboards need to be cleaned with antiseptic wipes. This prevents germs being transferred from one person to another.

Always think ahead.

Keep the work area clean and tidy. A clean and tidy work area is motivating to work in and healthier than a dirty / untidy one.

Testing your knowledge

1. Why is it necessary to read the manual before operating office equipment?
2. Why should a franking machine always be reset after use?
3. Why must some documents be shredded before recycling?
4. Which resources can be recycled?
5. Why is it important to keep waste to a minimum?
6. Why do equipment manufacturers recommend particular resources for their machines?
7. Why is it important to leave the work area ready for the next user?
8. Why should office equipment be kept clean and hygienic?
9. When a new piece of office equipment is delivered, what is the first thing that should be done?
10. Where is the best advice found on how to use a new piece of equipment?

Skills

You may be familiar with some pieces of office equipment, having worked with them in previous jobs. However, you will need to check the office equipment models you will be working with, particularly if they are different from the models you have had previous experience of. Check with your office manager if there are any differences and what the implications of these differences are. If you are coming across new pieces of office equipment of which you have no experience, make sure you ask your manager to cover these either in your induction or additional training. Use the manufacturer’s manual or any organisational procedures that might have been prepared to review how to operate office equipment you will operate.

ACTIVITY 9
Keep a work diary over the period of a month, recording which office equipment you have used and the training you have received. If there is any equipment in your office that you have not been trained to use, speak to your supervisor about getting trained to use it.

Review the office space to find out where the office equipment you will be working with is situated. Is the work area safe, clean and tidy? If not, make sure it is before commencing your operations, as working in a positive environment will make the task more enjoyable. Make sure all the manufacturer’s manuals or organisational procedures are accessible for each piece of office equipment.

ACTIVITY 10
Find all the operating manuals for the office equipment in your office. If there are any missing, ask your supervisor if you can order a copy.
When asked to undertake a task using a piece of office equipment, make sure you clearly understand what it is you have to do. Check the deadline you have for the task. You need to know if you are producing a finished article or a rough draft for internal use. If you know exactly what standard of work is required you will be able to check for yourself whether you have met it, e.g. are copies required in colour or black and white / should copies be single- or double-sided? This will make sure you take as little time as possible executing the task and use as few resources as required.

Minimise the amount of waste produced at all times. Do dummy runs to test out how effectively the piece of office equipment you are using is operating. Make any adjustments or replacements or report any problems. If the task is going to be delayed, check back with the person who gave you the task to let them know and make alternative arrangements. Remember to shred any confidential documents before recycling.

Deal with any problems as they arise by either following instructions of the office equipment or reporting them to the appropriate authority. When completing a task using a piece of office equipment make sure you keep it clean and hygienic and ready for use by the next user.

**ACTIVITY 11**

Get your supervisor to record how well you use the below, if these are used in your organisation:

- A computer to send emails, search the Internet and produce letters
- The messaging function on a telephone
- A photocopier to make copies, enlarge and reduce copies
- A printer to use double-sided printing
- A franking machine using different Royal Mail services
- A calculator to work out costs
- A laminator to cover documents etc.
- A binding machine to bind together documents

**Testing your skills**

1. What office equipment is used in your office?
2. Which pieces of office equipment do you regularly use?
3. Where are the manufacturers’ manuals or organisational procedures kept for pieces of office equipment?

4. Who do you ask if you do not understand a manufacturer’s manual?

5. Which pieces of equipment do you need authority to operate?

6. Who do you report to if office equipment breaks down?

7. Where are the resources stored for office equipment?

8. Where do you find the postage costs for outgoing mail?

9. Why should paper be stored flat?

10. How do you restock paper and toner in a photocopier, printer and fax machine?

11. How do you keep office equipment clean and hygienic?

Ready for assessment?

To achieve this Level 2 unit of a Business & Administration qualification, learners will need to demonstrate that they are able to perform the following activities:

1. Located and selected office equipment needed for a task

2. Used office equipment following the manufacturer’s and organisational guidelines

3. Used office equipment, minimising waste

4. Kept office equipment clean and hygienic

5. Dealt with office equipment problems, following the manufacturer’s and organisational procedures

6. Referred problems, if required

7. Made sure final work products met agreed requirements

8. Made sure products were delivered to agreed timescales

9. Made sure office equipment, resources and the work area were ready for the next user

You will need to produce evidence from a variety of sources to support the performance requirements of this unit.

If you carry out the ‘ACTIVITIES’ and respond to the ‘NEED TO KNOW’ questions, these will provide some of the evidence required.
Links to other units

While gathering evidence for this unit, evidence may also be used from evidence generated from other units within the Business & Administration suite of units. Below is a sample of applicable units; however, most units within the Business & Administration suite of units will also be applicable.

<table>
<thead>
<tr>
<th>QCF NVQ</th>
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<tbody>
<tr>
<td><strong>Communications</strong></td>
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<tr>
<td>Communicate in a business environment (Level 2)</td>
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<tr>
<td>Make and receive telephone calls</td>
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<tr>
<td>Use electronic message systems</td>
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<tr>
<td><strong>Core business &amp; administration</strong></td>
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<tr>
<td>Manage own performance in a business environment (Level 2)</td>
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<tr>
<td>Improve own performance in a business environment (Level 2)</td>
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<td>Work in a business environment (Level 2)</td>
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<td>Work with other people in a business environment (Level 2)</td>
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<tr>
<td><strong>Customer service</strong></td>
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<td>Handle mail</td>
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<td><strong>Document production</strong></td>
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<tr>
<td>Produce documents in a business environment</td>
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<tr>
<td>Prepare text from notes</td>
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<tbody>
<tr>
<td><strong>Communications</strong></td>
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<tr>
<td>Prepare to communicate in a business environment</td>
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<tr>
<td>Make and receive telephone calls</td>
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<td>Use electronic message systems</td>
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<td><strong>Core business &amp; administration</strong></td>
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<tr>
<td>Agree how to manage and improve own performance in a business environment</td>
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<tr>
<td>Undertake work in a business environment</td>
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<tr>
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