Administration Personnel?

Learning is not only classroom

Training Curricula

(Intellectual Output 6)

Level: 2

Validation of Formal, Non-Formal and Informal Learning: The case study of Administration Personnel

Coordinator:

MMC Mediterranean Management Centre

Partners:

Centre Integrat Públic de FP
MISERICÒRDIA
VALÈNCIA

NÁRODNÝ ÚSTAV
CELOŽIVOTNÉHO VZDELÁVANIA

CYPRUS
CHAMBER OF
COMMERCE AND
INDUSTRY

CYPRUS CERTIFICATION COMPANY

IMA
International
Management Assistants

ORBIS
INSTITUTE

ΔΗΜΗΤΡΑ
εκπαιδευτική συμβουλευτική

vhs
Volkshochschule
im Landkreis Cham e.V.

eupa
Validation of Formal, Non-Formal and Informal Learning
next

Program:	Erasmus+
Key Action:	2- Strategic Partnership
Project Title:	**Validation of Formal, Non-Formal and Informal Learning: The case study of Administration Personnel**
Project Acronym:	EUPA_NEXT
Project Agreement Number:	2015-1-CY01-KA202-011853
Intellectual Output Number:	6
Intellectual Output:	Certified EUPA _NEXT training curricula EQF Levels 2, 3,4 and 5

Contents

Intellectual Output 6 Training Curricula level 2

Intellectual Output 6 Training Curricula level 2

1. A map of the training materials developed by EUPA_NEXT

Area of work	Theme	Unit	Learning Outcome Number	Learning Outcome Description
WA1: Office Procedures	1. Mail	2.1 Handle the Mail	1	Demonstrate the ability to describe and follow the procedure through which the organisation handles incoming and outgoing mail.
WA1: Office Procedures	1. Mail	2.1 Handle the Mail	2	Demonstrate the ability to arrange incoming mail appropriately (control of documents, delivery to the right persons, etc.).
WA1: Office Procedures	1. Mail	2.1 Handle the Mail	3	Demonstrate the ability to collect, arrange and dispatch outgoing mail accurately.
WA1: Office Procedures	2. Stock	2.2 Handle the Stock	4	Demonstrate the ability to explain, describe and follow the stock control procedures that apply in the office in order for the office to run smoothly. Recommend improvements to these procedures.
WA1: Office Procedures	2. Stock	2.2 Handle the Stock	5	Demonstrate the ability to maintain the right level of stock needed to run the office smoothly using specific procedures and tools.
WA2: Office Equipment and Technology	3. Office Equipment	2.3 Use of office equipment to carry out simple tasks including simple troubleshooting	6	Demonstrate the ability to identify the proper use of office equipment to meet different simple business tasks and use this equipment, carry out simple trouble shooting in accordance with health and safety legislation and regulations.
WA3: Communication and social, telephone handling, code of conduct, equal opportunities and relationships	4. Business Communication	2.4 Use business communication skills clearly and effectively	7	Demonstrate the ability to recall the main principles of effective verbal and non-verbal communication and demonstrate competence in applying these principles in a clear and effective way.
WA3: Communication and social, telephone handling, code of conduct, equal opportunities and relationships	5. Telephone Techniques	2.5 Use telephone techniques effectively	8	Demonstrate the ability to recall the main principles of effective telephone communication and demonstrate competence in applying these principles in a clear and effective way.

Intellectual Output 6 Training Curricula level 2

Area of work	Theme	Unit	Learning Outcome Number	Learning Outcome Description
WA3: Communication and social, telephone handling, code of conduct, equal opportunities and relationships	6. Code of conduct and equal opportunities	2.6 Understand and apply code of conduct according to organizational principles	9	Demonstrate the ability to define, describe and follow the organisation's Code of Conduct within the social, economic and cultural context.
WA3: Communication and social, telephone handling, code of conduct, equal opportunities and relationships	7. Relationships	2.7 Recall and apply key principles of good relationships with customers, external stakeholders and colleagues in a clear and effective way	10	Demonstrate the ability to recall the key principles of data protection, security and confidentiality within the workplace and in the business environment and apply these principles effectively and efficiently.
WA3: Communication and social, telephone handling, code of conduct, equal opportunities and relationships	7. Relationships	2.7 Recall and apply key principles of good relationships with customers, external stakeholders and colleagues in a clear and effective way	11	Demonstrate the ability to recall the key principles of good relationships with customers and other external stakeholders, demonstrate competence in applying these principles in a clear and effective way. Be able to perform Public Relations activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions.
WA3: Communication and social, telephone handling, code of conduct, equal opportunities and relationships	7. Relationships	2.7 Recall and apply key principles of good relationships with customers, external stakeholders and colleagues in a clear and effective way	12	Demonstrate the ability to recall the key principles of good working relationships within the organisation and demonstrate competence in applying these principles in a clear and effective way within the organisation. Be able to perform Public Relations activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions.
WA4: Written Communication	8. Written Communication	2.8 Use written communication skills to produce a variety of routine business documents	13	Demonstrate the ability to recall the main principles of effective forms of written communication and demonstrate competence in applying these principles in a clear and effective way in order to produce simple routine documents.
WA4: Written Communication	8. Written Communication	2.8 Use written communication skills to produce a variety of routine business documents	14	Demonstrate the ability to produce a variety of routine business documents (based on predefined templates).

Intellectual Output 6 Training Curricula level 2

Area of work	Theme	Unit	Learning Outcome Number	Learning Outcome Description
WA4: Written Communication	8. Written Communication	2.8 Use written communication skills to produce a variety of routine business documents	15	Demonstrate the ability to communicate in writing at a level that is appropriate for business (use business terms, avoid jargon etc.).
WA5: Filing System Documentation and Databases	9. Filing	2.9 Use filing skills to maintain an established system	16	Demonstrate the ability to maintain established physical and electronic filing systems.
WA5: Filing System Documentation and Databases	10. Business Document	2.10 Interpret routine business Documents	17	Demonstrate the ability to prepare, interpret and check entries of routine business documents.
WA5: Filing System Documentation and Databases	11. Databases	2.11 Use basic database skills to enter information in a database	18	Demonstrate the ability to enter, edit, organise and store accurate and relevant data in an existing database system (electronic or manual).
WA6: Bookkeeping, Accounting and Financial Transactions	12. Accounting	2.12 Perform routine business transactions	19	Demonstrate the ability to make business transactions and to implement simple and routine accounting (e.g. petty cash reconciliation).
WA6: Bookkeeping, Accounting and Financial Transactions	12. Accounting	2.12 Perform routine business transactions	20	Demonstrate the ability to make payments to suppliers and receive payments from customers in conformity with organisational procedures.
WA7: Business Travel, Diary Systems, Meeting organization and event management	13. Business travel and accommodation	2.13 Recommend business travel and accommodation arrangements and prepare relevant documentation	21	Demonstrate the ability to recommend business travel and accommodation arrangements in accordance with a deadline and in line with budget requirements and organisational procedures.
WA7: Business Travel, Diary Systems, Meeting organization and event management	13. Business travel and accommodation	2.13 Recommend business travel and accommodation arrangements and prepare relevant documentation	22	Demonstrate ability to produce and collate travel documentation within an appropriate timescale in order to meet traveller's needs and legal requirements (e.g. visa procedures).
WA7: Business Travel, Diary Systems, Meeting organization and event management	13. Business travel and accommodation	2.13 Recommend business travel and accommodation arrangements and prepare relevant documentation	23	Demonstrate ability to state the importance of checking travel plans immediately prior to the journey and carry out the process in a clear and effective way.
WA7: Business Travel, Diary Systems, Meeting organization and event management	14. Meetings	2.14 Prepare for a routine meeting (including meeting documentation)	24	Demonstrate ability to prepare for a routine meeting by drawing up a simple checklist, liaising with the Chair of the meeting, and produce the relevant documents required.

Intellectual Output 6 Training Curricula level 2

Area of work	Theme	Unit	Learning Outcome Number	Learning Outcome Description
WA7: Business Travel, Diary Systems, Meeting organization and event management	14. Meetings	2.14 Prepare for a routine meeting (including meeting documentation)	25	Demonstrate ability to produce drafts of all pre and post-meeting documentation before and after a routine meeting.
WA7: Business Travel, Diary Systems, Meeting organization and event management	15. Diary Systems	2.15 Use diary systems for routine business purposes	26	Demonstrate ability to operate an electronic diary for routine business purposes to meet the needs of workgroups and customers.
WA7: Business Travel, Diary Systems, Meeting organization and event management	15. Diary Systems	2.15 Use diary systems for routine business purposes	27	Demonstrate the ability to compare and contrast paper and electronic diary systems and report on findings to line manager.
WA7: Business Travel, Diary Systems, Meeting organization and event management	15. Diary Systems	2.15 Use diary systems for routine business purposes	28	Demonstrate the ability to use diary systems to handle requests from others for new or modified diary entries in order to provide effective business support.
WA7: Business Travel, Diary Systems, Meeting organization and event management	15. Diary Systems	2.15 Use diary systems for routine business purposes	29	Demonstrate the ability to make accurate diary entries and maintain an up-to-date system.
WA8: Visitors/ Customer Service	16. Visitors/ Customers	2.16 Handle visitors and customers with professionalism	30	Demonstrate the ability to welcome visitors and customers in a professional manner, identify the purpose of their visit and make them feel welcome during their period of waiting.
WA8: Visitors/ Customer Service	16. Visitors/ Customers	2.16 Handle visitors and customers with professionalism	31	Demonstrate the ability to use appropriate tone of voice and body language when dealing with visitors and customers.
WA8: Visitors/ Customer Service	16. Visitors/ Customers	2.16 Handle visitors and customers with professionalism	32	Demonstrate a basic understanding of customer care principles and be able to apply these in an effective way, including the ability to solve routine problems using simpler rules to the satisfaction of visitors and customers.
WA9: ICT Skills	17. Word Processing	2.17 Use word processing software to produce simple routine document	33	Demonstrate the ability to use word processing software safely and securely to produce simple documents that meet the requirements of the office.

Intellectual Output 6 Training Curricula level 2

Area of work	Theme	Unit	Learning Outcome Number	Learning Outcome Description
WA9: ICT Skills	18. Spreadsheets	2.18 Use spreadsheets to produce simple routine sheets	34	Demonstrate the ability to use a spreadsheet safely and securely to enter, edit and organise numerical and other data including simple formulas to meet the routine requirements of the office.
WA9: ICT Skills	19. Presentations	2.19 Use presentation software to produce simple routine presentations	35	Demonstrate the ability to use presentation software safely and securely to produce simple electronic presentations that meet the requirements of the office.
WA9: ICT Skills	20. Internet	2.20 Use the internet to carry out simple tasks	36	Demonstrate the ability to connect to internet sites safely and securely using browser software and search tools including identification of relevant business sites and communicating information online as required by the office.
WA9: ICT Skills	21. Emails	2.21 Use email to carry out simple tasks	37	Demonstrate the ability to use email software tools and techniques to compose and send messages; manage incoming email efficiently, safely and securely to meet the requirements of the office.
WA12: Numeric Skills	22. Numeric Skills	2.22 Make basic mathematical calculations	38	Demonstrate knowledge of, and the ability to apply, basic mathematical calculations in simple business situations (e.g. calculate discount or vat).

2. General introduction to Eupa_Next Training Curriculum

The EUPA_NEXT is the continuation of the previous, very successful EUPA project, which aimed to develop a model for the recognition and validation of the qualifications of the sector of personal assistants based on learning outcomes.

EUPA consists of:

- A qualification framework stating the knowledge, skills and competences for administration personnel. (Levels 2-5)
- An assessment tool for level 2 enabling to assess the knowledge, skills and competences in order to get them certified.
- A curriculum and training materials for level 2, to help the personal assistant complete the certification.

The EUPA_NEXT is broadening this concept by developing the curriculum, training materials and assessment tool for the rest of the levels (3-5).

The EUPA_NEXT training curriculum follows the modular philosophy and is compatible with the Qualification Framework that has been developed previously. It is structured in Work Areas, each covering different topic. Work areas are than defined as sets of units that cover the knowledge, skills and competences for one or more learning outcomes. The Curriculum can be used in combination with the Trainers' guide containing the training materials and methodological tools for individual Units. The curricula have been developed in such a way to ensure that the learning outcomes described in the qualifications frameworks are met in a pedagogic way and that the required knowledge, skills and competences will be acquired.

The training curriculum presents the following:

- Short description and aim for each work area and unit
- The learning outcomes for each unit
- The suggested duration of the unit
- The Contents outline for the unit, divided into sections
- The suggested methodology to be used (e.g. Lecture, Group discussion etc.)
- Methodological tools that were designed for each unit

A separate Curriculum document is developed for each of the EUPA_NEXT levels.

3. Eupa_Next Training Curriculum Level 2

The main purpose of the EQF is to make qualifications across EU countries and educational systems more readable and understandable. The core of the EQF is its eight reference levels defined in terms of learning outcomes, i.e. knowledge, skills and autonomy-responsibility (competence). Learning outcomes express what individuals know, understand and are able to do at the end of a learning process.

	Knowledge	Skills	Responsibility and autonomy (Competence)
	In the context of EQF, knowledge is described as theoretical and/or factual.	In the context of EQF, skills are described as cognitive (involving the use of logical, intuitive and creative thinking) and practical (involving manual dexterity and the use of methods, materials, tools and instruments).	In the context of the EQF responsibility and autonomy is described as the ability of the learner to apply knowledge and skills autonomously and with responsibility
Level 2	Basic factual knowledge of a field of work or study	Basic cognitive and practical skills required to use relevant information in order to carry out tasks and to solve routine problems using simple rules and tools	Work or study under supervision with some autonomy

THE EUPA_NEXT training curriculum for level 2 is structured in 22 units (training modules), each under different theme and handles one or more learning outcomes. The following diagram presents the structure of this level of the qualification framework, in terms of the Work Areas, Themes and Units covered by this document.
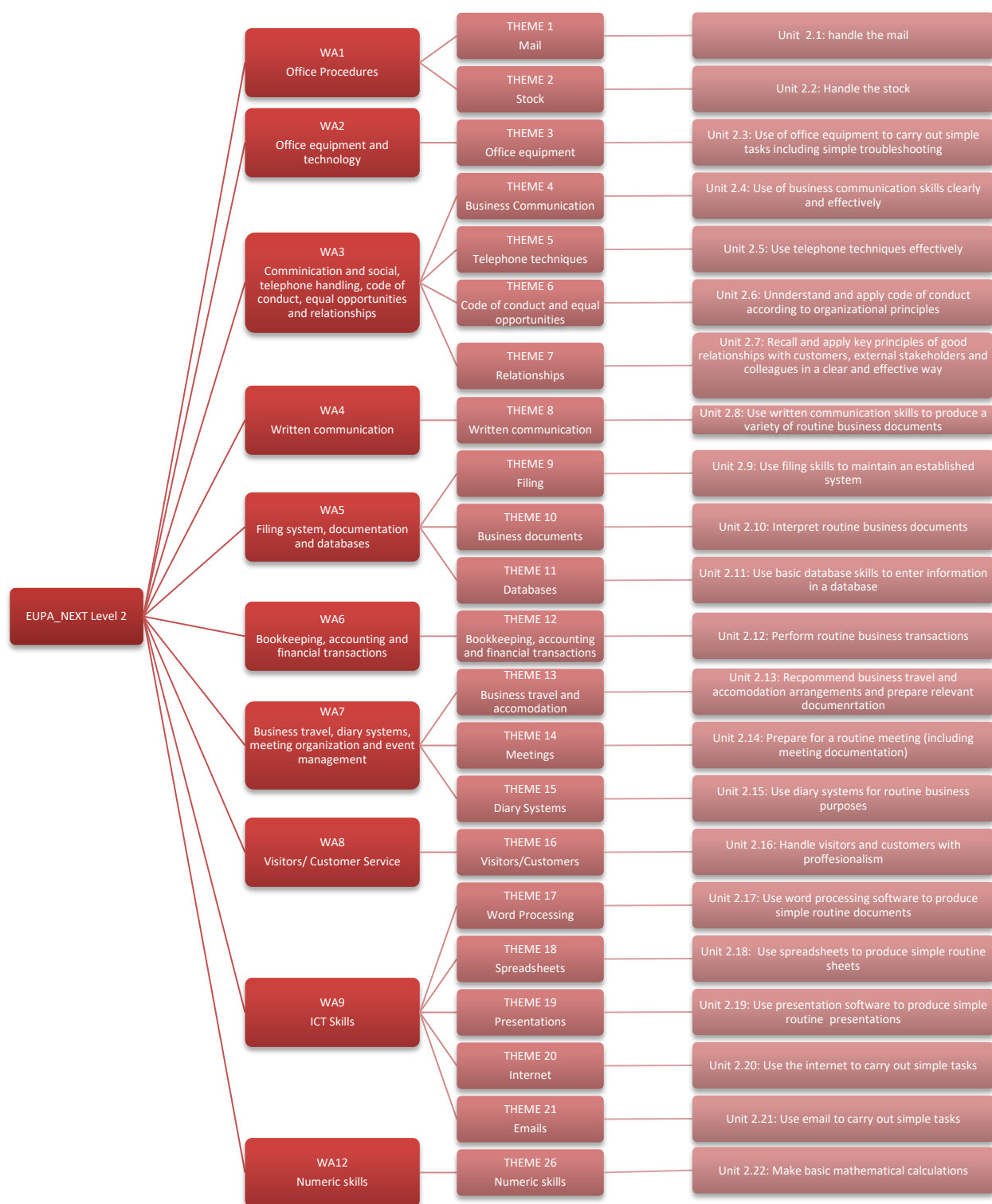
EUPA_NEXT Level 2

Work Area	Theme	Unit
WA1 Office Procedures	**THEME 1** Mail	Unit 2.1: handle the mail
	THEME 2 Stock	Unit 2.2: Handle the stock
WA2 Office equipment and technology	**THEME 3** Office equipment	Unit 2.3: Use of office equipment to carry out simple tasks including simple troubleshooting
WA3 Comminication and social, telephone handling, code of conduct, equal opportunities and relationships	**THEME 4** Business Communication	Unit 2.4: Use of business communication skills clearly and effectively
	THEME 5 Telephone techniques	Unit 2.5: Use telephone techniques effectively
	THEME 6 Code of conduct and equal opportunities	Unit 2.6: Unnderstand and apply code of conduct according to organizational principles
	THEME 7 Relationships	Unit 2.7: Recall and apply key principles of good relationships with customers, external stakeholders and colleagues in a clear and effective way
WA4 Written communication	**THEME 8** Written communication	Unit 2.8: Use written communication skills to produce a variety of routine business documents
WA5 Filing system, documentation and databases	**THEME 9** Filing	Unit 2.9: Use filing skills to maintain an established system
	THEME 10 Business documents	Unit 2.10: Interpret routine business documents
	THEME 11 Databases	Unit 2.11: Use basic database skills to enter information in a database
WA6 Bookkeeping, accounting and financial transactions	**THEME 12** Bookkeeping, accounting and financial transactions	Unit 2.12: Perform routine business transactions
WA7 Business travel, diary systems, meeting organization and event management	**THEME 13** Business travel and accomodation	Unit 2.13: Recpommend business travel and accomodation arrangements and prepare relevant documenrtation
	THEME 14 Meetings	Unit 2.14: Prepare for a routine meeting (including meeting documentation)
	THEME 15 Diary Systems	Unit 2.15: Use diary systems for routine business purposes
WA8 Visitors/ Customer Service	**THEME 16** Visitors/Customers	Unit 2.16: Handle visitors and customers with proffesionalism
WA9 ICT Skills	**THEME 17** Word Processing	Unit 2.17: Use word processing software to produce simple routine documents
	THEME 18 Spreadsheets	Unit 2.18: Use spreadsheets to produce simple routine sheets
	THEME 19 Presentations	Unit 2.19: Use presentation software to produce simple routine presentations
	THEME 20 Internet	Unit 2.20: Use the internet to carry out simple tasks
	THEME 21 Emails	Unit 2.21: Use email to carry out simple tasks
WA12 Numeric skills	**THEME 26** Numeric skills	Unit 2.22: Make basic mathematical calculations

Figure 1: Eupa_Next Qualification Framework Level 2

4. Recommendations for participation

There are no prerequisites specified for the applicants for the initial certification of an Administration Personnel in level 2 of EQF.

5. Certification

Any person who wants to get certified as Administration Personnel in EQF Level 2 can go through the assessment of his/her knowledge, skills and competences on the Work Areas described in this document.

The certification will be done according to the Certification Scheme for persons as Administration Personnel in EQF Level 2 and certified persons will be able to perform tasks and demonstrate their knowledge, skills and competence as described in this document and the EUPA_NEXT Qualification framework for Level 2.

The assessment will be done on a Unit basis and once a participant successfully completes the assessment for all units in the respective EQF level, he/she will be able to get certified on the level.

The assessment will be performed using assessment tools for EQF Level 2 developed within the EUPA_NEXT project. For each unit of EQF Level 2, the assessment will consist of oral assessment which will cover the EQF statements under knowledge and written assessment or practical demonstration which will cover practical skills and competences.

The certification can be granted on the Level or on Units that the candidate will select.

Certification at EQF Level 2 may be maintained indefinitely.

All procedures that apply for obtaining, assessing, granting, maintaining and withdrawing Certification of persons are described in the Certification Scheme for the certification of persons as Administration Personnel that has been developed within the project and are in accordance with the requirements of the Standard CYS EN ISO 17024: 2012.

Work Area 1: Office Procedures

Themes in the work area

The following themes are included in the work area" Office Procedures" for level 2.

Theme 1: Mail

Theme 2: Stock

Units in the work area

The following units are included in the work area "Office Procedures" for level 2.

2.1 Handle the Mail (Theme 1: Mail)

2.2 Handle the Stock (Theme 2: Stock)

Short Description of the work area

At level two, the work area deals with two main issues namely:

1. The ability of the learners to handle incoming and outgoing mail.

2. The ability of the learners to handle the stock control procedures as well as to maintain the right level of stock in order to run the office procedures smoothly by using specific procedures and tools.

Aim of the work area

The aim of this work area is to make the learners familiar with handling incoming and outgoing mail, which is an important procedure in order to run the office efficiently. Following the organizational procedures and using the appropriate channels, incoming and outgoing mail will be handled in order to provide the addressees (internally or in the outside business world) with the mail as soon as possible.

In the work area the learners will also deal with the effective handling of stock, maintain stock items to required levels, checking incoming offers and deliveries and report problems. The topic of keeping lots of stock with its advantages and disadvantages will also be focused.

Learning outcomes in the work area

Unit 2.1: Handle the Mail

- LO001 Demonstrate the ability to describe and follow the procedure through which the organisation handles incoming and outgoing mail.
- LO002 Demonstrate the ability to arrange incoming mail appropriately (control of documents, delivery to the right persons, etc.).
- LO003 Demonstrate the ability to collect, arrange and dispatch outgoing mail accurately.

Unit 2.2: Handle the Stock

- LO004 Demonstrate the ability to explain, describe and follow the stock control procedures that apply in the office in order for the office to run smoothly. Recommend improvements to these procedures.
- LO005 Demonstrate ability to maintain the right level of stock needed to run the office smoothly using specific procedures and tools

Knowledge, skills and competences covered in each of the learning outcomes are described in the Qualification framework.

THEME 1: MAIL

This theme deals with handling the mail in a professional business environment. The topic is allocated to level two only.

LEVEL 2

- 2.1 HANDLE THE MAIL

UNIT 2.1: HANDLE THE MAIL

1) Short description

The Unit 2.1 aims to provide skills and competences to the learners to handle incoming and outgoing mail effectively as one of the important procedures in order to run an office efficiently.

2) Suggested duration of the Unit (hours)

5 hours

3) Aims and objectives

By the end of this unit, learners will be able to:

- Realise the importance of handling mail
- Discuss the issues involved in handling mail such as sorting, prioritisation, confidentiality issues etc.
- Describe possible company policies for handling mail
- Describe issues arising from inefficient mail distribution
- Apply guidelines for data protection and confidential documents
- Describe and apply different incoming mail policies
- Identifying the appropriate recipient for incoming mail
- Describe and apply different outgoing mail policies
- List different mail services
- Maintain the address database

4) Content of the Unit

Section 1: What is mail and why it is important [1 hour]

- What is mail
- The term "handling mail"
- Why it is important
- Possible scenarios
- Problems arising from inefficient mail distribution
- Procedures for handling mail
- Identify the company's policy for mail handling and recommend improvements (through the use of a methodological tool)

Section 2: Handling incoming mail [2 hours]

- Incoming mail
- Incoming mail policies
- Data protection and confidentiality
- Handling junk mail
- Identification of the appropriate recipient
- Receiving and sorting mail (through the use of a methodological tool)

Section 3: Handling outgoing mail [2 hours]

- Outgoing mail policies
- Addressing for success
- Post office requirements for outgoing mail
- Different mail services
- Handling outgoing mail (through the use of a methodological tool)
- Handling international mail (through the use of a methodological tool)

5) Methodology to be used during the training of Unit 2.1

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 1: What is mail and why it is important **Duration:** 1 hour	☒ Lecture ☒ Work in Groups ☒ Group discussion ☒ Case study	☒ Projector ☒ Laptop	• **EUPANEXT_LO_001_M_001 Identify the company policy and recommend improvements.**

Intellectual Output 6 Certified EUPA Training Curricula level 2

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 2: Handling incoming mail **Duration:** 2 hours	☒ Lecture ☒ Work in Groups ☒ Simulation ☒ Group discussion	☒ Projector ☒ Laptop	• **EUPANEXT_LO_002_M_001 Handling Incoming Mail**
Section 3: Handling outgoing mail **Duration:** 2 hours	☒ Lecture ☒ Work in Groups ☒ Simulation ☒ Group discussion	☒ Projector ☒ Laptop	• **EUPANEXT_LO_003_M_001: Handling outgoing mail** • **EUPANEXT_LO_003_M_002: Handling International Mail**

THEME 2: STOCK

This theme deals with handling the stock in a professional business environment. The topic is allocated to level two only.

LEVEL 2

- 2.2 HANDLE THE STOCK

UNIT 2.2: HANDLE THE STOCK

1) Short description

The Unit 2.2 deals with making the learners familiar in order to handle the stock as one of the important procedures in order to run an office efficiently.

2) Suggested duration of the Unit (hours)

4 hours

3) Aims and objectives

By the end of this unit, learners will be able to:

- List common office supplies
- Describe main organisational procedures for ordering, accepting delivery, storing, stock taking, monitoring, and disposing stock
- Describe how to deal with stock security
- Elaborate on the pros and cons of keeping stock and explain the reasoning of stock control procedures
- Describe different stock monitoring methods
- Outline the procedure used for ordering from a specific supplier

4) Content of the Unit

Section 1: Organisational procedures for handling stock [1 hour]

- Common office supplies
- Organisational procedures for handling stock
    - o Ordering
    - o Accepting delivery

Intellectual Output 6 EUPA Training Curricula level 2

- o   Storing
- o   Stock taking
- o   Monitoring
- o   Disposing
- Dealing with stock security

Section 2: Reasoning for stock control [0,5 hours]

- Advantages and disadvantages of keeping stock
- The importance of procedures

Section 3: Stock monitoring methods [2,5 hours]

- Stock monitoring methods
- Possibilities for PAs
- The procedure for ordering stock
- Calculating stock to be ordered

5) Methodology to be used during the training of Unit 2.2

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 1: Organisational procedures for handling stock **Duration:** 1 hour	☒ Lecture ☒ Work in Groups	☒ Projector ☒ Laptop	
Section 2: Reasoning for stock control **Duration:** 0,5 hours	☒ Lecture ☒ Work in Groups	☒ Projector ☒ Laptop	
Section 3: Stock monitoring methods **Duration:** 2,5 hours	☒ Lecture ☒ Work in Groups ☒ Written exercise ☒ Simulation ☒ Group discussion	☒ Projector ☒ Laptop	• **EUPANEXT_LO_004_M_001 Ordering office supplies** • **EUPANEXT_LO_005_M_001 Monitoring Stock level**

Work Area 2: Office Equipment and Technology

Themes in the work area

The following themes are included in the work area" Office Equipment and Technology" for level 2.

Theme 3: Office Equipment

Units in the work area

The following Units are included in the work area" Office Equipment and Technology" for level 2.

2.3 Use of office equipment to carry out simple tasks including simple troubleshooting

Short Description of the work area

At level two, the work area deals with the ability of learners to properly make use of office equipment to meet different simple business tasks including simple troubleshooting

Aim of the work area

The aim of the work area is to provide the learners with the proper skills and competences in order to meet simple business tasks using office equipment and technology, which is an important procedure in order to run the office efficiently. This includes simple office equipment troubleshooting tasks following the health and safety legislation and regulations.

Learning outcomes in the work area

Unit 2.3: Use of office equipment to carry out simple tasks including simple troubleshooting

- LO006 Demonstrate the ability to identify the proper use of office equipment to meet different simple business tasks and use this equipment, carry out simple trouble shooting in accordance with health and safety legislation and regulations.

Intellectual Output 6 EUPA Training Curricula level 2

Knowledge, skills and competences covered in each of the learning outcomes are described in the Qualification framework.

THEME 3: OFFICE EQUIPMENT

Being familiar with the standard office equipment and the efficient handling of it for carrying out routine tasks is crucial for the smooth performance of the office. In particular, this is important in case of simple troubleshooting (e.g. change toner, refill paper, etc.) these capabilities will support the whole team in the enterprise.
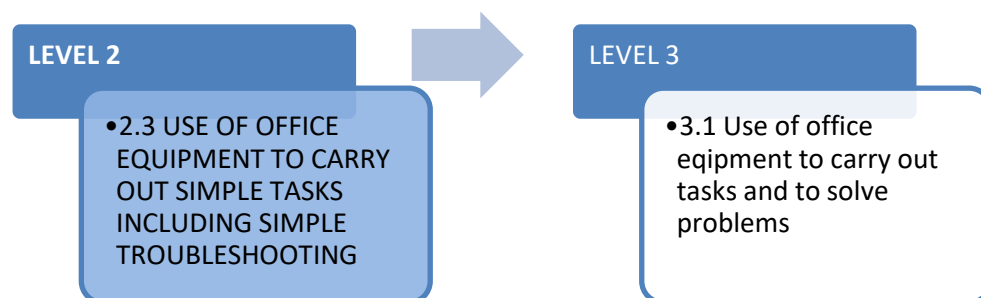
LEVEL 2

- 2.3 USE OF OFFICE EQUIPMENT TO CARRY OUT SIMPLE TASKS INCLUDING SIMPLE TROUBLESHOOTING

LEVEL 3

- 3.1 Use of office eqipment to carry out tasks and to solve problems

UNIT 2.3: USE OF OFFICE EQUIPMENT TO CARRY OUT SIMPLE TASKS INCLUDING SIMPLE TROUBLESHOOTING

1) Short description

The Unit deals with the proper skills and competences in order the learners to meet simple business tasks using office equipment and technology efficiently.

2) Suggested duration of the Unit (hours)

3 hours

3) Aims and objectives

By the end of this unit, learners will be able to:

- Identify different office equipment and their use including multipurpose machines
- Use and maintain equipment appropriately
- Perform simple troubleshooting to equipment

4) Content of the Unit:

Section 1: Different types of equipment and their use [1 hour]

- Different types of office equipment (telephone, fax machine, photocopier, printer, binding machine, etc.)
- Matching business task with business equipment

Section 2: Appropriate use and maintenance of equipment [1 hour]

Intellectual Output 6 EUPA Training Curricula level 2

- Correct and incorrect use of equipment

- Efficient use of equipment in different situations

Section 3: Simple troubleshooting [1 hour]

- Examples of simple troubleshooting

- Health and safety regulations and troubleshooting

5) Methodology to be used during the training of Unit 2.3

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 1: Different types of equipment and troubleshooting **Duration:** 1 hour	☒ Lecture ☒ Work in Groups ☒ Role Play ☒ Group discussion	☒ Projector ☒ Laptop ☒ Video or DVD player	
Section 2: Appropriate use and maintenance of equipment **Duration:** 1 hour	☒ Lecture ☒ Group discussion ☒ Practical exercise	☒ Projector ☒ Laptop ☒ Post it notes	
Section 3: Simple troubleshooting **Duration:** 1 hour	☒ Lecture ☒ Group discussion ☒ Practical exercise ☒ Exercise using ICT ☒ Simulation	☒ Projector ☒ Laptop ☒ Post it notes	- **EUPA_LO_006_M_001 Use of office equipment**

Work Area 3: Communication and social, telephone handling, code of conduct, equal opportunities and relations

Themes in the work area

The following themes are included in the work area" Communication and social, telephone handling, code of conduct, equal opportunities and relations" for level 2.

Theme 4: Business Communication

Theme 5: Telephone Techniques

Theme 6: Code of conduct and equal opportunities

Theme 7: Relationships

Units in the work area

The following Units are included in the work area" Communication and social, telephone handling, code of conduct, equal opportunities and relations" for level 2.

2.4 Use of business communication skills clearly and effectively (Theme 4: Business Communication)

2.5 Use telephone techniques effectively (Theme 5: Telephone Techniques)

2.6 Understand and apply code of conduct according to organizational principles (Theme 6: Code of conduct and equal opportunities

2.7 Recall and apply key principles of good relationships with customers, external stakeholders and colleagues (Theme 7: Relationships)

Short Description of the work area

At level two, the work area includes the following themes:

Theme 4: Business communication, which enables learners to learn and apply appropriate and effective communication in the business and workplace context.

Theme 5: Telephone techniques, which revolves around the basics of effective communication over the phone.

Theme 6: Code of conduct and equal opportunities, includes training material on code of conduct and applications in daily practice.

Theme 7: Relationships helps learners understand and build effective and strong business relationships with several stakeholders, external and internal customers, etc.

Aim of the work area

Unit 2.4 helps learners understand the key principles of effective verbal and non-verbal communication and demonstrate competence in applying these principles in a clear and effective way.

Unit 2.5 includes training materials on the main principles of effective telephone communication, allowing learners to demonstrate competence in applying these principles in a clear and effective way.

Unit 2.6 defines and describes the concept of a Code of Conduct within the social, economic and cultural context of an organisation. At this level, the topic is viewed in a basic manner, focusing mostly on explaining what a code of conduct is, and helping learners follow the main principles dictated by a code of conduct.

Unit 2.7 includes the key principles of data protection, security and confidentiality within the workplace and in the business environment and some application that might relate to these principles. Moreover, it describes key principles for establishing good relationships with customers and other external stakeholders and demonstrating competence in applying these principles in a clear and effective way. Finally, Public Relations activities are analysed and explained to the learners.

Learning outcomes in the work area

Unit 2.4: Use of business communication skills clearly and effectively

- LO007 Demonstrate the ability to recall the main principles of effective verbal and non-verbal communication and demonstrate competence in applying these principles in a clear and effective way.

Unit 2.5: Use Telephone Techniques effectively

- LO008 Demonstrate the ability to recall the main principles of effective telephone communication and demonstrate competence in applying these principles in a clear and effective way.

Unit 2.6: Understand and apply code of conduct according to organizational principles

- LO009 Demonstrate the ability to define, describe and follow the organisation's Code of Conduct within the social, economic and cultural context.
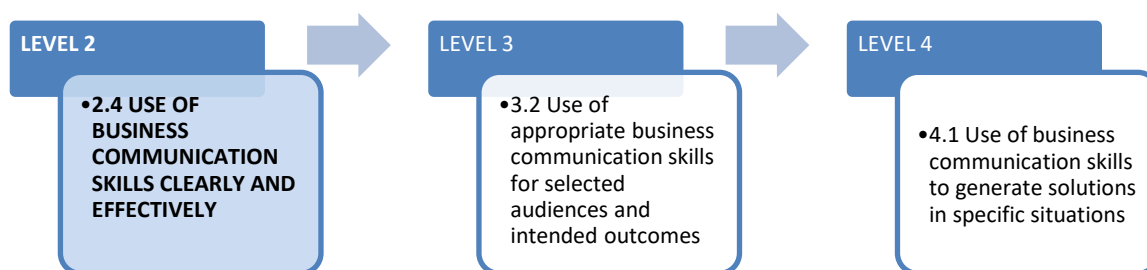
Unit 2.7: Recall and apply key principles of good relationships with customers, external stakeholders and colleagues in a clear and effective way

- LO010 Demonstrate the ability to recall the key principles of data protection, security and confidentiality within the workplace and in the business environment and apply these principles effectively and efficiently.

- LO011 Demonstrate the ability to recall the key principles of good relationships with customers and other external stakeholders, demonstrate competence in applying these principles in a clear and effective way. Be able to perform Public Relations activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions.

- LO012 Demonstrate the ability to recall the key principles of good working relationships within the organisation and demonstrate competence in applying these principles in a clear and effective way within the organisation. Be able to perform Public Relations activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions.

Knowledge, skills and competences covered in each of the learning outcomes are described in the Qualification framework.

THEME 4: BUSINESS COMMUNICATION

Theme Business Communication describes the use of business communication and social skills in different levels, starting from simple use of business communication and social skills, progressing to adaptation to situations and audiences including solutions of simple problems and progressing to generation of solutions through business communication to non-routine problems

LEVEL 2

- •2.4 USE OF BUSINESS COMMUNICATION SKILLS CLEARLY AND EFFECTIVELY

LEVEL 3

- •3.2 Use of appropriate business communication skills for selected audiences and intended outcomes

LEVEL 4

- •4.1 Use of business communication skills to generate solutions in specific situations

UNIT 2.4: USE OF BUSINESS COMMUNICATION SKILLS CLEARLY AND EFFECTIVELY

1) Short description

The Unit 2.4 deals with making the learners familiar in order to apply the appropriate communication skills for business life. It includes practical advice concerning both verbal and non-verbal communication and ultimately helps learners understand the key principles of effective verbal and non-verbal communication and demonstrate competence in applying these principles in a clear and effective way.

2) Suggested duration of the Unit (hours)

4 hours

3) Aims and objectives

By the end of the units, learners will be able to:

- Recall the main principles of effective telephone communication and demonstrate competence in applying these principles in a clear and effective way
- Describe internal and external communication
- Explain how is information transmitted
- Describe body language
- List words that one should avoid in communication
- Use the most appropriate words to respond to a specific routine situation or a problem
- Use appropriate non-verbal signals to respond to a specific routine situation or a problem

Intellectual Output 6 EUPA Training Curricula level 2

eüpa

Validation of Formal, Non-Formal and Informal Learning

next

- Illustrate the ability for communicating effectively in the workplace

- Differentiate between verbal and non-verbal communication

- Demonstrate competence in applying the principles of verbal and non-verbal communication in a clear and effective way

- Distinguish between internal and external communication

- Assess non-verbal signals of others and draw careful conclusions through combination of different signals or through combination of body language and voice

4) Content of the Unit

Section 1: Verbal and non-verbal communication [2 hours]

- Video and analysis: Hello Mr. President

- Types of business communication
  - o Verbal and non-verbal communication
  - o Written communication
  - o Verbal communication
    - Advantages
    - Disadvantages

- Internal and external communication

- How information is transmitted

- The voice

- Body language
  - o Innate or acquired
  - o Gestures, face expressions and eye contact

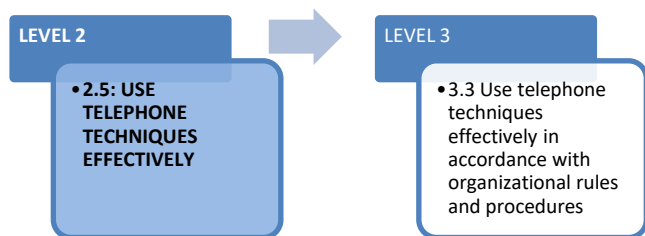### Section 2: Proxemics, active listening, speaking [2 hours]

- distances and meanings
  - o tables and positions

- Interpersonal communication
  - o active listening
  - o interest and respect
  - o the importance of a speaker's posture and body language

5) Methodology to be used during the training of Unit 2.4

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 1: Verbal and non-verbal communication **Duration:** 2 hours	☒ Lecture ☒ Work in Groups ☒ Role Play ☒ Video analysis	☒ Projector ☒ Laptop ☒ Video or DVD player	• **EUPA_LO_007_M_001 Hello Mr. President**
Section 2: Proxemics, active listening, speaking **Duration:** 2 hours	☒ Lecture ☒ Work in Groups ☒ Role Play ☒ Group exercise with cards	☒ Projector ☒ Laptop ☒ Video or DVD player	• **EUPA_LO_007_M_002 ZOOM**

THEME 5: TELEPHONE TECHNIQUES

Theme Telephone Techniques describes the basic principles of telephone communication and the appropriate skills needed by the learners in different levels, starting from simple principles of telephone communication, progressing to more complex telephone skills and methods of monitoring their application.

LEVEL 2

- 2.5: USE TELEPHONE TECHNIQUES EFFECTIVELY

LEVEL 3

- 3.3 Use telephone techniques effectively in accordance with organizational rules and procedures

UNIT 2.5: USE TELEPHONE TECHNIQUES EFFECTIVELY

1) Short description

The Unit 2.5 deals with making the learners familiar with the telephone techniques used in business communication. It includes the main principles of effective telephone communication and demonstrates basic competence in applying these principles.

2) Suggested duration of the Unit (hours)

6 hours

3) Aims and objectives

By the end of the units, learners will be able to:

- Recall the main principles of effective telephone communication
- Explain the advantages and limitations of telephone communication
- Identify and describe different stages involved in telephone (incoming and outgoing) and techniques that should be used in each of them
- Identify positive and negative words and phrases
- Identify strategies for improving vocabulary
- Explain why body language is important in communication over the phone
- Describe key information they should take when taking a phone message
- Describe how information could affect confidentiality and security and how to handle these issues and list relevant examples
- Use the telephone techniques for inbound and outbound telephone communications

Intellectual Output 6 EUPA Training Curricula level 2

- Use effective telephone techniques to solve routine problems through the phone
- Take messages through the phone
- Filter the phone calls of colleagues based on instructions
- Identify the important phone calls and the ones that must promoted directly
- Demonstrate competence in applying principles of effective telephone communication autonomously (under some supervision) in a clear and effective way

4) Content of the Unit

Section 1: Introduction [1 hour]

- Types of communication
- Advantages and limitations of telephone communication
- Effectiveness of a telephone call

Section 2: Structure of a telephone call [1 hour]

- Incoming calls
- Outgoing calls

Section 3: Non-verbal communication [1,5 hours]

- Internal and external communication
- Voice
- Body language in telephone communication

Section 4: Verbal communication [2,5 hours]

- Words and expressions
- Using magic words
- Strategic Vocabulary
  - Negative and Positive Expressions
  - Improve your vocabulary
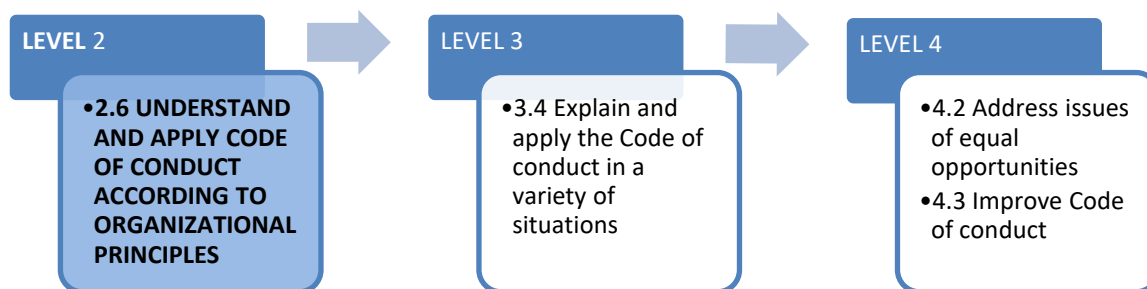- Completing the telephone call
- Taking messages

Intellectual Output 6 EUPA Training Curricula level 2

5) Methodology to be used during the training of Unit 2.5

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 1: Introduction **Duration:** 1 hour	☒ Lecture ☒ Work in Groups	☒ Projector ☒ Laptop Play	
Section 2: Structure of a telephone call **Duration:** 1 hour	☒ Lecture ☒ Work in Groups	☒ Projector ☒ Laptop	
Section 3: Non-verbal communication **Duration:** 1,5 hours	☒ Lecture ☒ Work in Groups ☒ Role play	☒ Projector ☒ Laptop	
Section 4: Verbal communication **Duration:** 2,5 hours	☒ Lecture ☒ Work in Groups ☒ Role Play ☒ Group exercise with cards	☒ Projector ☒ Laptop	**EUPA_LO_008_M_001 Hold the line**

THEME 6: CODE OF CONDUCT AND EQUAL OPPORTUNITIES

The code of conduct includes some basic codes that apply for all organisations: appearance, dress code and social skills. It can vary slightly depending on country, culture, religion as well as economic, social and political situations.

LEVEL 2
- 2.6 UNDERSTAND AND APPLY CODE OF CONDUCT ACCORDING TO ORGANIZATIONAL PRINCIPLES

LEVEL 3
- 3.4 Explain and apply the Code of conduct in a variety of situations

LEVEL 4
- 4.2 Address issues of equal opportunities
- 4.3 Improve Code of conduct

UNIT 2.6: UNDERSTAND AND APPLY CODE OF CONDUCT ACCORDING TO ORGANIZATIONAL PRINCIPLES

1) Short description

The Unit will address important basic codes that apply for all organisations: Appearance, dress code, social skills and most importantly, it will help learners understand the concept, role and importance of a code of conduct.

2) Suggested duration of the Unit (hours)

3 hours

3) Aims and objectives

By the end of this unit, learners will be able to:

- Define and describe code of conduct (e.g. dress code, handling of confidential information, harassment, and conflict of interest)
- Describe the role of a code of conduct in a work environment
- Present examples of code of conduct
- Describe different types of dress code.
- Describe how the social, economic and cultural context should be taken into account.
- Apply aspects of the code of conduct according to the organisational principles Follow the Organization's Code of Conduct

eupa

Validation of Formal, Non-Formal and Informal Learning

next

4) Content of the Unit

Section 1: Concept and basic aspects of a code of conduct [1,5 hours]

- Code of conduct
    - Definition
    - Common sections of a code of conduct
- Role and importance of a code of conduct
    - Role and importance of social and cultural context

Section 2: Code of conduct and appearance [1,5 hours]

- First impression is based on appearance
    - Successful personal image
        - Dress successfully
    - Professional Dress Code
- Different dress codes
    - Basic Biz
    - Top Drawer Casual
    - High Quality Business
   - After hours' casual
    - Weekend casual

5) Methodology to be used during the training of Unit 2.6

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 1: Concept and basic aspects of a code of conduct **Duration:** 1,5 hours	☒ Lecture ☒ Work in Groups	☒ Projector ☒ Laptop	
Section 2: Code of conduct and appearance **Duration:** 1,5 hours	☒ Lecture ☒ Work in Groups	☒ Projector ☒ Laptop	- **EUPA_LO_009_M_001 Creative social skills** - **EUPA_LO_009_M_002: Can you recognise the dress code?**

Intellectual Output 6 EUPA Training Curricula level 2

THEME 7: RELATIONSHIPS

Theme Relationships sets the basis for effective relationship building and maintenance of good, constructive relationships not only with customers and other external stakeholders, but also with employees, colleagues and other internal stakeholders
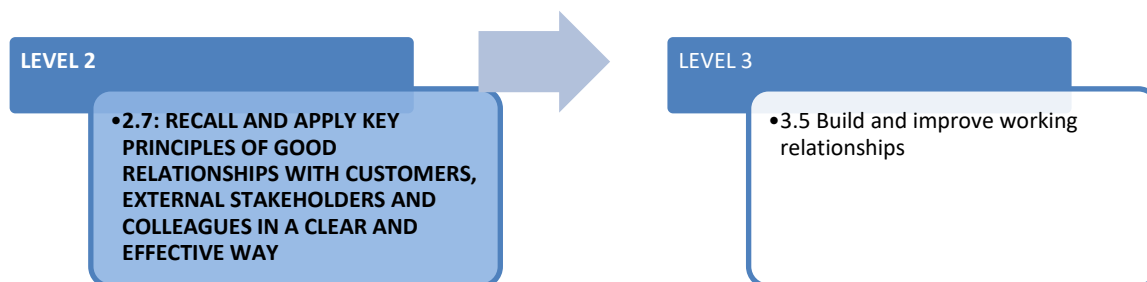
LEVEL 2

- 2.7: RECALL AND APPLY KEY PRINCIPLES OF GOOD RELATIONSHIPS WITH CUSTOMERS, EXTERNAL STAKEHOLDERS AND COLLEAGUES IN A CLEAR AND EFFECTIVE WAY

LEVEL 3

- 3.5 Build and improve working relationships

UNIT 2.7: RECALL AND APPLY KEY PRINCIPLES OF GOOD RELATIONSHIPS WITH CUSTOMERS, EXTERNAL STAKEHOLDERS AND COLLEAGUES IN A CLEAR AND EFFECTIVE WAY

1) Short description

The Unit will address important key principles for confidentiality and positive organisational behaviour when working with customers, external stakeholders and colleagues.

2) Suggested duration of the Unit (hours)

4 hours

3) Aims and objectives

After the completion of this unit, learners will be able to:

- Describe the Organization's key principles of data protection, security and confidentiality.

- List examples where principles of confidentiality should be taken into consideration.

- Explain why confidentiality is important.

- Comply with agreed protocols and apply confidentiality principles in a clear and effective way.

- Illustrate how the organization's key principles of data protection, security and confidentiality apply in different situations.

- Demonstrate the ability to deal with data protection and confidentiality within the workplace and in the business environment autonomously under small supervision.

4) Content of the Unit

Section 1: Confidentiality in the workplace [1,5 hours]

- Confidentiality in the workplace
  - o Definition
    - Health Records
    - Information Privacy
    - Privacy
    - Discussion
  - o Case study
  - o Why is confidentiality important?
  - o General principles of confidentiality

Section 2: Good relationships with internal & external stakeholders [2,5 hours]

- Internal and external stakeholders
  - o Internal stakeholders
  - o External stakeholders
- Importance and benefits of positive relationships
- Key principle of good working relationships
  - o Understand the relationships with customers and other internal stakeholders
  - o How to maintain relationships with key stakeholders
- Positive Organisational Behaviour at work
- PR activities promoting relationships with internal stakeholders
- Communication within the organisation

5) Methodology to be used during the training of Unit 2.7

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 1: Confidentiality in the workplace **Duration:** 1,5 hours	☒ Lecture ☒ Work in Groups ☒ Case study ☒ Group	☒ Projector ☒ Laptop	• **EUPA_LO_010_M_001 Shield and protection** • **EUPA_LO_010_M_002 Case study: Confidentiality**

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
	discussion		
Section 2: Good relationships with internal and external stakeholders **Duration:** 2,5 hours	☒ Lecture ☒ Work in Groups ☒ Group discussion ☒ Simulation ☒ Case study	☒ Projector ☒ Laptop	• **EUPA_LO_011_M_001 Identify stakeholders** • **EUPANEXT_LO_012_M_001 Positive organisational behaviour**

Work Area 4: Written Communication

Themes in the work area

The following themes are included in the work area" Written Communication" for level 2.

Theme 8: Written Communication

Units in the work area

The following Units are included in the work area" Written Communication" for level 2.

2.8 Use written communication skills to produce a variety of routine business documents

Short Description of the work area

At level two, the work area deals with three main issues namely:

1. The ability of learners to recall the main principles of effective forms of written communication.
2. The ability of learners to produce a variety of routine business documents.
3. The ability of learners to communicate in writing in the business environment.

Aim of the work area

The aim of the work area is to make the learners familiar with the proper use of effective forms of written communication by enabling them to produce different routine business documents and communicate in an adequate way for the business environment.
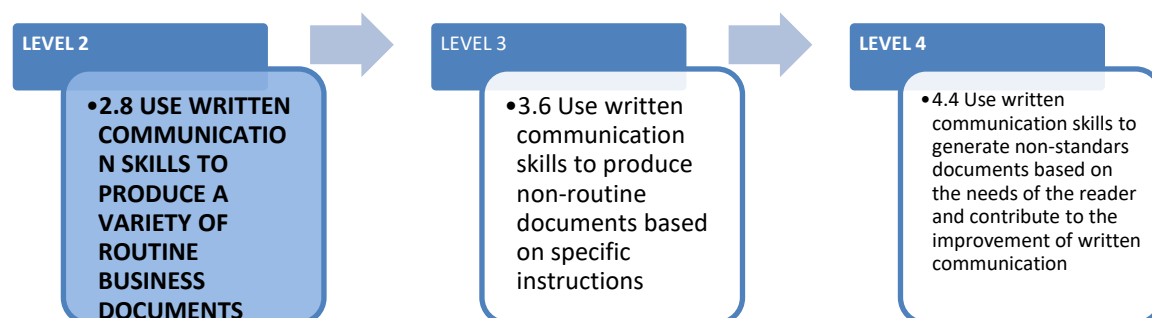
Learning outcomes in the work area

Unit 2.8: Use written communication skills to produce a variety of routine business documents

Intellectual Output 6 EUPA Training Curricula level 2

- LO013 Demonstrate the ability to recall the main principles of effective forms of written communication and demonstrate competence in applying these principles in a clear and effective way in order to produce simple routine documents
- LO014 Demonstrate the ability to produce a variety of routine business documents (based on predefined templates)
- LO015 Demonstrate the ability to communicate in writing in the business environment (use business terms, avoid jargon etc.)

Knowledge, skills and competences covered in each of the learning outcomes are described in the Qualification framework.

THEME 8: WRITTEN COMMUNICATION

Being familiar with the terminology and the production of routine business documents as is crucial for the smooth performance of the office and for keeping good relationships with clients. This theme at this level, is concerned with the production of routine documents in predictable situations.

LEVEL 2	LEVEL 3	LEVEL 4
•2.8 USE WRITTEN COMMUNICATION SKILLS TO PRODUCE A VARIETY OF ROUTINE BUSINESS DOCUMENTS	•3.6 Use written communication skills to produce non-routine documents based on specific instructions	•4.4 Use written communication skills to generate non-standars documents based on the needs of the reader and contribute to the improvement of written communication

UNIT 2.8: USE WRITTEN COMMUNICATION SKILLS TO PRODUCE A VARIETY OF ROUTINE BUSINESS DOCUMENTS

1) Short description

The Unit deals with making the learners familiar in order to use written communication skills (e.g. terminology, routine documents) in the daily work.

2) Suggested duration of the Unit (hours)

3 hours

3) Aims and objectives

After the completion of the unit, learners will be able to:

- Describe different types of documents that may be used at work

- List advantages and disadvantages of written communication.

- Describe the basic structure of written communication and the content of each part

- Describe different formats in which text may be presented

- List and explain the main principles of business writing, taking into consideration the type of document, the target audience and the objectives of the document

- Compose different types of simple documents applying the main principles of business writing.

- Organise, structure and present information in routine documents so that it is clear and accurate, and meets the needs of the audience.

Intellectual Output 6 EUPA Training Curricula level 2

- Organise content required to produce routine documents
- Use basic formatting features to produce documents to an agreed style.
- Select the appropriate type of a document depending on different criteria
- Demonstrate competence in applying principles autonomously in a clear and effective way in order to produce simple documents that are not based on predefined templates
- Describe the procedure you will follow when you produce various types of routine business documents based on predefined templates. Produce a variety of routine business documents autonomously under small supervision.
- Demonstrate competence in producing simple routine documents, based on predefined templates autonomously under small supervision.
- Explain what is meant by the term 'writing in the business environment'
- List business terms that you use at the Organization in order to communicate in writing, specific to industry or field of work.
- Use language that suits the purpose and audience
- Select the right business terms that should be used at the Organization in order to communicate in writing at a level that is appropriate.
- Use correct grammar, punctuation and spelling.
- Point out mistakes and correct the provided documents so that the level of writing is appropriate to given situation.

4) Content of the Unit

Section 1: Different types of documents and basic principles of written communication [2 hours]

- Collection and discussion about several types of documents in daily work in the business world
- Definition and characteristics of the different types of documents
- Basic principles of written communication
- Advantages a d disadvantages of written communication

Section 2: Use different techniques to present different types of information and adequate writing tone/terminology [2 hours]

- Working with tables and graphs
- Writing tone types
- Appropriate tone
- Formal / informal tone

- Magic words

- Business writing tips

Section 3: Structure of a document and templates: Letter, Fax, Memo, Email [2 hours]

- Structure of a document

    o Introduction

    o Main body

    o Conclusions

- Templates

    o Why work with templates?

    o Different templates explained

5) Methodology to be used during the training of Unit 2.8

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 1: Different types of documents and basic principles of written communication **Duration:** 2 hours	☒ Lecture ☒ Work in Groups ☒ Creative group work	☒ Projector ☒ Laptop	• **EUPA_LO_013_M_001** **Writing skills**
Section 2: Use different techniques to present different types of information and adequate writing tone/terminology **Duration:** 2 hours	☒ Lecture ☒ Work in Groups	☒ Projector ☒ Laptop	• **EUPA_LO_015_M_001** **Writing appropriately**.
Section 3: Structure of a document and templates: Letter, Fax, Memo, Email **Duration:** 2 hours	☒ Lecture ☒ Work in Groups	☒ Projector ☒ Laptop	• **EUPA_LO_014_M_001** **Making an order**

Work Area 5: Filing System Documentation and Databases

Themes in the work area

The following themes are included in the work area "Filing System Documentation and Databases" for level two.

Theme 9: Filing

Theme 10: Business Documents

Theme 11: Databases

Units in the work area

The following Units are included in the work area" Filing System Documentation and Databases" for level two.

2.9: Use filing skills to maintain an established system (Theme 9: Filing)

2.10: Interpret routine business documents (Theme 10: Business Documents)

2.11: Use basic database skills to enter information in a database (Theme 11: Databases)

Short Description of the work area

At level two, the work area deals with three main issues namely:

- The ability of learners to use filing skills to maintain an established system.
- The ability of learners to interpret routine business documents.
- The ability of learners to use basic database skills to enter information in a database.

Aim of the work area

The aim of the work area is to make the learners familiar with the proper use of filing systems, to work with routine business documents as well as to use basic skills in order to enter information in a database.

Learning outcomes in the work area

Unit 2.9: Use filing skills to maintain an established system

- LO016: Demonstrate the ability to maintain established physical and electronic filing systems.

Unit 2.10: Interpret routine business documents

- LO017: Demonstrate the ability to prepare, interpret and check entries of routine business documents.
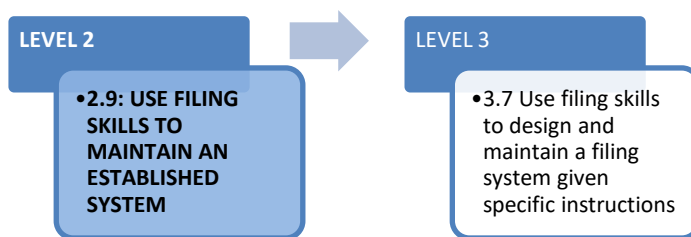
Unit 2.11: Use basic database skills to enter information in a database

- LO018: Demonstrate the ability to enter, edit, organise and store accurate and relevant data in an existing database system (electronic or manual).

Knowledge, skills and competences covered in each of the learning outcomes are described in the Qualification Framework.

THEME 9: FILING

Being familiar with filing skills used in daily work in the business world is very important for every office worker. This theme concerns not only working with established systems but also with issues of design and maintenance of an effective and efficient system of files.

LEVEL 2

- **2.9: USE FILING SKILLS TO MAINTAIN AN ESTABLISHED SYSTEM**

LEVEL 3

- 3.7 Use filing skills to design and maintain a filing system given specific instructions

UNIT 2.9: USE FILING SKILLS TO MAINTAIN AN ESTABLISHED SYSTEM

1) Short description

The Unit deals with making the learners familiar in order to use filing skills to maintain an established system.

2) Suggested duration of the Unit (hours)

4 hours

3) Aims and objectives

The trainer will introduce and familiarize the learners with following topics:

- Different filing systems in the business world today
- How to work with filing systems

4) Content of the Unit

Section 1: Introduction to filing Systems [1 hour]

- Different filing systems
    - o paper-based
    - o electronic
- Types of documents/records

Section 2: Working with filing Systems [3 hours]

- Grouping and sorting documents
- File codes

Intellectual Output 6 EUPA Training Curricula level 2

- Responsibility

- Confidentiality

5) Methodology to be used during the training of Unit 2.9

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 1: Introduction to filing Systems **Duration:** 1 hour	☒ Lecture ☒ Group discussion	☒ Projector ☒ Laptop	
Section 2: Working with filing systems **Duration:** 3 hours	☒ Lecture ☒ Group discussion ☒ Written Exercise	☒ Projector ☒ Laptop	• **EUPA_LO_016_M_001 Practice Filing Systems**

THEME 10: BUSINESS DOCUMENTS

The theme "Business Documents" with its Unit "Interpret routine business documents" is part of level two only. However, it is crucial for an enterprise that the staff on all levels is familiar with handling routine business documents.

LEVEL 2

- **2.10 BUSINESS DOCUMENTS**

UNIT 2.10: BUSINESS DOCUMENTS

1) Short description

The Unit deals with making the learners familiar in order to being capable to interpret routine business documents.

2) Suggested duration of the Unit (hours)

2 hours

3) Aims and objectives

The trainer will introduce and familiarize the learners with the topic of interpreting routine business documents

4) Content of the Unit

Section 1: How to interpret routine business documents [1 hour]

- ISO, Control Factors and Business Documents
- Main types of business documents
- Key points to check in a document
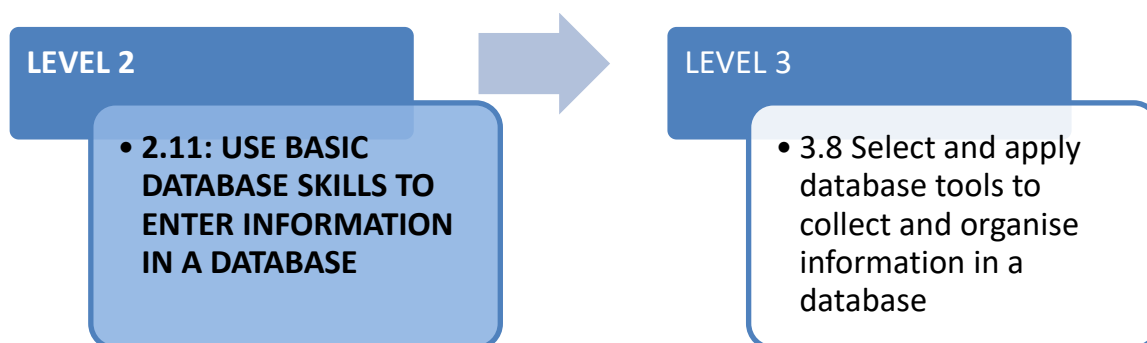
Section 2: Document entries [1 hour]

- Entries
  - o Document numbers
  - o Customer details
  - o VAT, total
- Other key points to check on a document
- Written exercise

5) Methodology to be used during the training of Unit 2.10

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 1: How to interpret routine business documents **Duration:** 1 hour	☒ Lecture ☒ Work in Groups	☒ Projector ☒ Laptop	
Section 2: Document entries **Duration:** 1 hour	☒ Lecture ☒ Work in Groups ☒ Written exercise	☒ Projector ☒ Laptop	• **EUPA_LO_017_M_001 Identify mistakes**

THEME 11: DATABASES

Being familiar with filing skills used in daily work with databases is essential when working with databases.

LEVEL 2

- **2.11: USE BASIC DATABASE SKILLS TO ENTER INFORMATION IN A DATABASE**

LEVEL 3

- 3.8 Select and apply database tools to collect and organise information in a database

UNIT 2.11: USE BASIC DATABASE SKILLS TO ENTER INFORMATION IN A DATABASE

1) Short description

The unit deals with making the learners familiar in order to use filing skills to enter information in a database.

2) Suggested duration of the Unit (hours)

1 hour

3) Aims and objectives

The trainer will introduce and familiarize the learners with following topics:

- what is a database
- how to use it effectively

4) Content of the Unit

Section 1: Introduction to basic Database [0,5 hours]

- What is a database
    - o Basic terms
    - o Information in a database
    - o Where to store data
    - o Different forms of electronic database

Section 2: How to work with a database [0,5 hours]

- Important skills needed
- How to, step-by-step

5) Methodology to be used during the training of Unit 2.11

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 1: Introduction to basic Database **Duration:** 0,5 hours	☒ Lecture ☒ Group Discussion	☒ Projector ☒ Laptop	
Section 2: How to work with a database **Duration:** 0,5 hours	☒ Lecture ☒ Group Discussion ☒ Written exercise ☒ Exercise using ICT	☒ Projector ☒ Laptop	• **EUPA_LO_018_M_001 Create a simple travel agent's database**

Work Area 6: Bookkeeping, Accounting and Financial Transactions

Themes in the work area

The following themes are included in the work area "Bookkeeping, Accounting and Financial Transactions" for level 2.

Theme 12: Accounting

Units in the work area

The following Units are included in the work area"Bookkeeping, Accounting and Financial Transactions" for level 2.

2.12 Perform routine business transactions

Short Description of the work area

At level two, the work area deals with two main issues namely:

- The ability of learners to use Business Transactions and to implement simple and routine accounting.
- The ability of learners to make payments to suppliers and receive payments from customers in conformity with organisational procedures.

Aim of the work area

It is the aim of the work area to make the learners familiar with the proper use Business Transactions, to implement simple and routine accounting and to make payments to suppliers and receive payments from customers in conformity with organisational procedures.

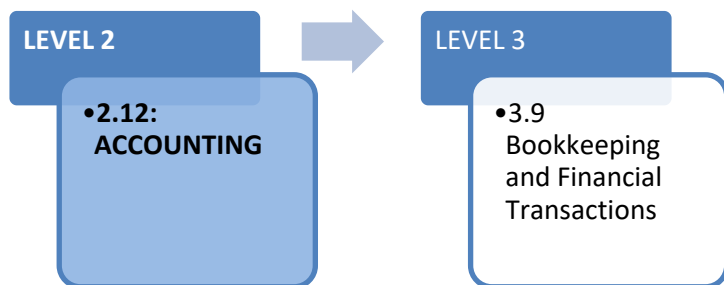# Learning outcomes in the work area

Unit 2.12 Perform routine business transactions

- LO019: Demonstrate the ability to use Business Transactions and to implement simple and routine accounting
- LO020: Demonstrate the ability to make payments to suppliers and receive payments from customers in conformity with organisational procedures.

Knowledge, skills and competences covered in each of the learning outcomes are described in the Qualification framework.

THEME 12: ACCOUNTING

Being familiar with accounting skills used in daily work in the business world is very important for every office worker.

LEVEL 2	LEVEL 3
•**2.12: ACCOUNTING**	•3.9 Bookkeeping and Financial Transactions

UNIT 2.12: PERFORM ROUTINE BUSINESS TRANSACTIONS

1) Short description

The Unit deals with making the learners familiar in order to use Business Transactions and to implement simple and routine accounting (e.g. petty cash reconciliation).

2) Suggested duration of the Unit (hours)

1.5 hours

3) Aims and objectives

The trainer will introduce and familiarize the learners with following topics:

- Issue receipts, invoices and credit notes using organisation's procedures

- Reconcile petty cash account using organisations' procedures

- Make a payment to a supplier and keep all relevant records updated

- Make a payment to a customer and keep all relevant records updated

4) Content of the Unit:

Section 1: Business Transactions [0,5 hours]

- Business Transactions and accounting

Section 2: Financial documents and payment procedures [1 hour]

- Financial documents for payment procedures

Intellectual Output 6 EUPA Training Curricula level 2

- Documents during a Payment Procedure

- VAT – Basic principles

- Petty cash reconciliation

5) Methodology to be used during the training of Unit 2.12

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 1: Business Transactions **Duration:** 0,5 hours	☒ Lecture	☒ Projector ☒ Laptop	
Section 2: Financial documents and payment procedures **Duration:** 1 hour	☒ Lecture ☒ Practical Exercise ☒ Written exercise	☒ Projector ☒ Laptop	• **EUPA_LO_019_M_001 Invoice** • **EUPA_LO_020_M_001 Payments through the development of posters**

eupa

Validation of Formal, Non-Formal and Informal Learning

next

Work Area 7: Business Travel, Diary Systems, Meeting Organisation and Event Management

Themes in the work area

The following themes are included in the work area "*Business Travel, Diary Systems, Meeting Organisation and Event Management*" for level 2.

Theme 13: Business Travel and Accommodation

Theme 14: Meetings

Theme 15: Diary Systems

Units in the work area

The following Units are included in the work area "*Business Travel, Diary Systems, Meeting Organisation and Event Management*" for level 2.

Unit 2.13 Recommend Business Travel and Accommodation Arrangements and Prepare Relevant Documentation (Theme 13: Business Travel and Accommodation)

Unit 2.14: Prepare for a routine meeting (including meeting documentation) (Theme 14: Meetings)

Unit 2.15: Use diary systems for routine business purposes (Theme 15: Diary Systems)

Short Description of the work area

At level two, the work area deals with three main issues namely:

1. The ability of learners to properly make travelling and accommodation arrangements

2. Their ability to organise and participate in a meeting as well as to prepare documentation of a meeting

3. Their ability to follow diary systems

Aim of the work area

It is the aim of the work area to provide the learners with the proper skills and competences in order to implement simple business tasks regarding travelling and accommodation arrangements, meetings and other events.

Learning outcomes in the work area

UNIT 2.13: Recommend Business Travel and Accommodation Arrangements and Prepare Relevant Documentation

LO021 Demonstrate the ability to recommend business travel and accommodation arrangements in accordance with a deadline and in line with budget requirements and organisational procedures

LO022 Demonstrate the ability to produce and collate travel documentation within an appropriate timescale in order to meet traveller's needs and legal requirements (e.g. visa procedures).

LO023 Demonstrate the ability to state the importance of checking travel plans immediately prior to the journey and carry out the process in a clear and effective way.

Unit 2.14: Prepare for a routine meeting (including meeting documentation)

LO024 Demonstrate the ability to prepare for a routine meeting by drawing up a simple checklist, liaising with the Chair of the meeting, and produce the relevant documents required.

LO025 Demonstrate the ability to produce drafts of all pre and post-meeting documentation before and after a routine meeting

Unit 2.15: Use diary systems for routine business purposes

LO026 Demonstrate the ability to operate an electronic diary for routine business purposes to meet the needs of workgroups and customers.

LO027 Demonstrate the ability to compare and contrast paper and electronic diary systems and report on findings to line manager.

LO028 Demonstrate the ability to use diary systems to handle requests from others for new or modified diary entries in order to provide effective business support.

LO029 Demonstrate the ability to make accurate diary entries and maintain an up-to-date system.

Knowledge, skills and competences covered in each of the learning outcomes are described in the Qualification framework.

THEME 13: BUSINESS TRAVEL AND ACCOMMODATION

Theme Business travel and accommodation deals with preparing and managing all aspects of business trips from planning, booking, to preparing travel documentation and solving unexpected problems that may arise.
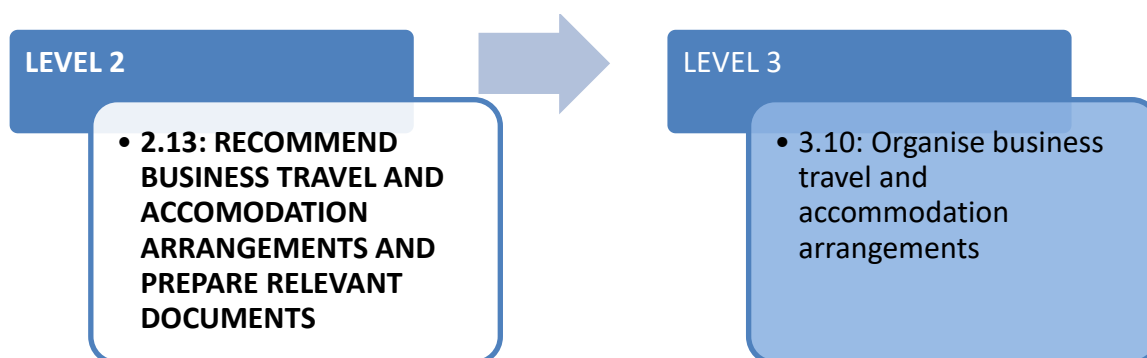
LEVEL 2

- **2.13: RECOMMEND BUSINESS TRAVEL AND ACCOMODATION ARRANGEMENTS AND PREPARE RELEVANT DOCUMENTS**

LEVEL 3

- 3.10: Organise business travel and accommodation arrangements

UNIT 2.13 RECOMMEND BUSINESS TRAVEL AND ACCOMMODATION ARRANGEMENTS AND PREPARE RELEVANT DOCUMENTATION

1) Short description

The Unit deals with making the learners familiar in order to know the basics around booking tickets, researching travelling and accommodation options and produce travel documentation

2) Suggested duration of the Unit (hours)

3 hours

3) Aims and objectives

By the end of the units, learners will be able to:

- Identify business travel and accommodation arrangements in accordance with a deadline and in line with budget requirements and organisational procedures
- Book suitable business travel or accommodation arrangements
- Produce and collate routine travel documentation within an appropriate timescale in order to meet traveller's needs and legal requirements
- Check documentation before handling to the traveller to ensure that all necessary documents are there.
- Carry out the process for checking travel plans immediately prior to the journey in a clear and effective way.
-

4) Content of the Unit

Section 1: Travelling basics [0,5 hours]

- Why it is important
  - The role of a personal assistant
  - Let's start with the basics
  - How do we travel?
  - Reasons for traveling

Section 2: Before and during the trip [1 hour]

- Booking
- Sources of information
- Transportation
  - Types of transportation
- Accommodation
  - Types of accommodation

Section 3: During and after travelling [1,5 hours]

- Critical information needed
- Documentation
  - Travel documents
  - Business documents
- Your organized Travel & Accommodation spreadsheet
- Trip itinerary
- Use checklists to help you with the organisation of trips
- Legal requirements
- Payments
- Case study

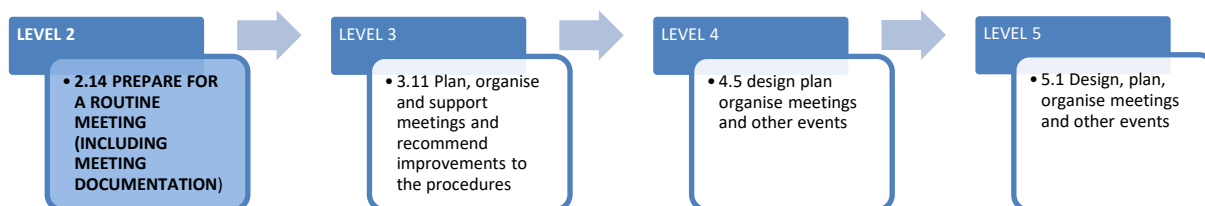## 5) Methodology to be used during the training of Unit 2.13

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 1: Travelling basics Duration: 0,5 hours	☒ Lecture ☒ Simulation	☒ Projector ☒ Laptop ☒ Video or DVD play	• **EUPA_LO_021_M_001 Recommend an itinerary**

Intellectual Output 6 EUPA Training Curricula level 2

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 2: Before and during the trip **Duration:** 1 hour	☒ Lecture ☒ Simulation	☒ Projector ☒Laptop	• **EUPA_LO_022_M_001 Prepare the itinerary**
Section 3: During and after travelling **Duration:** 1.5 hours	☒ Lecture ☒ Simulation	☒ Projector ☒Laptop	• **EUPA_LO_032_M_001 Eliminate the risks**

This theme deals with different types of meetings that take place in organizations and the role of administration employees in their planning, organization and preparation, as well as their support during and after the meeting.

LEVEL 2	LEVEL 3	LEVEL 4	LEVEL 5
• 2.14 PREPARE FOR A ROUTINE MEETING (INCLUDING MEETING DOCUMENTATION)	• 3.11 Plan, organise and support meetings and recommend improvements to the procedures	• 4.5 design plan organise meetings and other events	• 5.1 Design, plan, organise meetings and other events

UNIT 2.14 PREPARE FOR A ROUTINE MEETING (INCLUDING MEETING DOCUMENTATION

1) Short description

This unit is focused on the development of the ability of learners to prepare for a routine meeting, liaise with the chair and the ability to produce the drafts of the meeting documentation.

2) Suggested duration of the unit (hours)

3 hours

3) Aims and objectives

In this unit learners will develop their skills in meeting preparation, by creating checklists, producing pre and post meeting documentation and supporting the meeting.

By the end of this unit, learners will

- Explain the role of the person preparing a meeting.
- Describe the different types of meetings and their main features.
- Explain how to plan meetings that meet agreed aims and objectives.
- Explain the role of the person preparing a meeting.
- Describe the different types of meetings and their main features.
- Explain how to plan meetings that meet agreed aims and objectives.
- List the items to put on a simple check list to help you prepare for the meeting
- Describe what type of organisation and support is provided before, during and after the meeting (e.g. meeting confirmation, dissemination of agenda, minutes taking, dissemination of evaluation forms, dissemination of minutes etc.)
- Explain how to identify suitable venues for different types of meetings.
- Describe the types of resources needed for different types of meetings.

Intellectual Output 6 EUPA Training Curricula level 2

- Name the different meeting documentation and how this will be produced.

- Explain the purpose of collecting and evaluating participant feedback from the meeting.

- Collect the feedback questionnaires and evaluate them with routine computer programme

- Create first draft version of meeting agenda, to be reviewed by the meeting chair

- Complete post meeting documentation with autonomy in cooperation with the chair of the meeting, and provide participants with individual tailor-made packages.

- Prepare a draft plan of procedures (to be followed before, during or after the meeting) including budgetary items, to be approved by the Chair of the meeting

- Make sure autonomously (under small supervision) that attendees' needs are met and solve routine problems (e.g. vegetarians).

- Attend to any requirements during the meeting as directed by the meeting organiser

- Assist the attendees with information for any routine problems during the meeting (e.g. checking time schedules, booking hotel rooms, calling taxis, recommend restaurants)

- Prepare a simple check list to prepare for a routine meeting.

- Organize a routine meeting by liaising with the Chair of the meeting for any organisational matters

- Prepare invitations for potential participants and confirm attendance.

- Follow up actions to be completed before, during and after the meeting (e.g. meeting confirmation, dissemination of agenda, minutes taking, dissemination of evaluation forms, dissemination of minutes etc.) and do so in the agreed timescale.

- Produce all the relevant documents needed for the meeting (e.g. list of attendance, agenda, signings, signage)

- Circulate necessary documents prior to the meeting

- Solve routine problems such as confirmations and cancellation of attendance, using simple methods and tools

- Keep record of arrangements made and services used.

- Make sure equipment and layout are appropriate (e.g. beamer)

4) Content of the unit:

Section 1: Basics of company meetings [0,5 hours]

- Professional meetings
- Physical and virtual meetings

Section 2: Preparation of meeting [1 hour]

- The role of the person responsible for preparation
- The purpose of the meeting
- Developing meeting checklist
- Scheduling the meeting

Intellectual Output 6 EUPA Training Curricula level 2

- Venue selection

- Equipment and other resources

- Meeting agenda

- Budget

Section 3: Support during the meeting [0,5 hours]

- Best practices

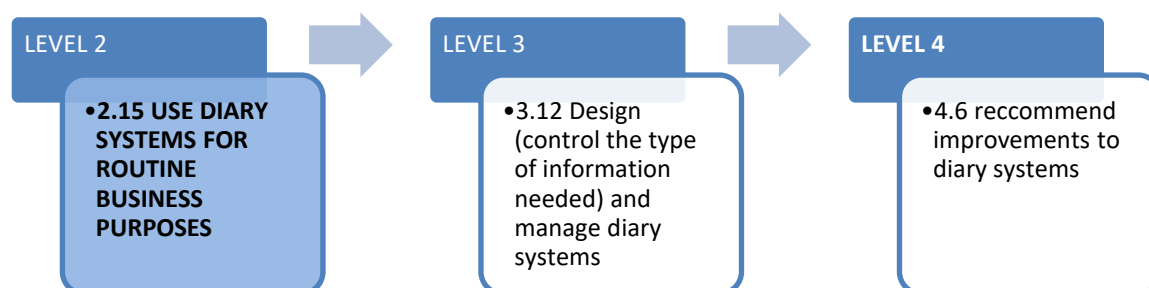## Section 4: Post-meeting actions [1 hour]

- Thank you letter

- Evaluation report

- Meeting minutes

- Other documentation

5) Methodology to be used during the training of unit 2.14

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 1: Basics of company **Duration:** 0,5 hours	☒ Lecture ☒ Group Discussion	☒ Projector ☒ Laptop	
Section 2: Preparation of meeting **Duration:** 1 hour	☒ Lecture ☒ Group Discussion ☒ Simulation	☒ Projector ☒ Laptop	• **EUPA_LO_024_M_001 Develop own simple checklist**
Section 3: Support during the meeting **Duration:** 1 hour	☒ Lecture ☒ Group Discussion	☒ Projector ☒ Laptop	
Section 5: Post-meeting actions **Duration:** 1 hour	☒ Lecture ☒ Group discussion ☒ Written exercise ☒ Role play	☒ Projector ☒ Laptop	• **EUPA_LO_025_M_001 Compose post meeting documentation**

THEME 15: DIARY SYSTEMS

This theme on level 2 has to do with the familiarization of learners with the basics of diary and calendar systems.

LEVEL 2	LEVEL 3	LEVEL 4
•2.15 USE DIARY SYSTEMS FOR ROUTINE BUSINESS PURPOSES	•3.12 Design (control the type of information needed) and manage diary systems	•4.6 reccommend improvements to diary systems

UNIT 2.15: USE DIARY SYSTEMS FOR ROUTINE BUSINESS PURPOSES

1) Short description

The Unit deals with making the learners familiar with the use of diary systems, both electronic and manual. It helps them use and edit such systems for routine business purposes

2) Suggested duration of the Unit (hours)

5 hours

3) Aims and objectives

By the end of the units, learners will be able to:

- Choose appropriate electronic diary system to meet the needs of the organization
- Operate an electronic diary for routine business purposes
- Choose between electronic and paper diary system and justify your choice.
- Collect and apply requests from others for new or modified diary entries in order to provide effective business support.
- Obtain all necessary information required for making the changes.
- Communicate agreed changes to those affected.
- Solve routine problems occurred using simple rules and tools
- Make new entries accurately and clearly.
- Record agreed changes to diary systems in accordance to the request.

4) Content of the Unit

Section 1: Introduction [1 hour]

- Time Management

- Diary systems and time management

- What is a Diary System

- Activities involved in managing diary systems

- Types of diary systems

    o Electronic

    o Manual – Paper based

Section 2: Electronic diary systems [1,5 hours]

- Common types of electronic diary systems

- Electronic diary systems vs. needs

- Advantages and disadvantages of electronic diary systems

Section 3: Manual diary systems [1,5 hours]

- Different Types of Manual Diary Systems

- Advantages and disadvantages of Manual Diary Systems

Section 4: Daily Work and Diary Systems [1 hour]

- The Master List

- A simple Daily Diary System

- Advantages of a Master List

- Electronic Master Lists

- Handle requests, prioritizing, provide effective business support

5) Methodology to be used during the training of Unit 2.15

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 1: Introduction **Duration:** 1 hour	☒ Lecture ☒ Work in Groups ☒ Simulation	☒ Projector ☒ Laptop	
Section 2: Electronic diary systems	☒ Lecture ☒ Simulation	☒ Projector ☒ Laptop	• **EUPANEXT_LO26_M001: Using MS Outlook and a Mobile Phone Calendar**

Intellectual Output 6 EUPA Training Curricula level 2

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Duration: 1,5 hour			
Section 3: Manual diary systems **Duration:** 1,5 hour	☒ Lecture ☒ Case study	☒ Projector ☒ Laptop	• **EUPANEXT_LO27_M001: Manual vs electronic systems**
Section 4: Daily Work and Diary Systems **Duration:** 1 hour	☒ Lecture ☒ Questions and answers ☒ Case study ☒ Simulation	☒ Projector ☒ Laptop	• **EUPANEXT_LO28_M001: Manual vs electronic systems** • **EUPANEXT_LO29_M001: Maintain it up to date**

eüpa
Validation of Formal, Non-Formal and Informal Learning
next

Work Area 8: Visitors/ Customer Service

Themes in the work area

The following themes are included in the work area "Visitors/ Customer Service" for level 2.

Theme 16: Handle visitors and customers with professionalism

Units in the work area

The following Units are included in the work area "Visitors/ Customer Service" for level 2.

Unit 2.16 Handle visitors and customers with professionalism (Theme 13: Handle visitors and customers with professionalism)

Short Description of the work area

At level two, the work area deals with three main issues namely:

1. Welcome visitors and customers in a professional manner.
2. Use appropriate tone of voice and body language when dealing with visitors and customers.
3. Basic understanding of customer care principles

Aim of the work area

It is the aim of the work area to provide the learners with the proper skills and competences in order to welcome visitors and customers in a professional manner, use appropriate tone of voice and body language when dealing with visitors and customers, and learn a basic understanding of customer care principles.

Learning outcomes in the work area

UNIT 2.16: Handle visitors and customers with professionalism

LO030 Demonstrate the ability to welcome visitors and customers in a professional manner, identify the purpose of their visit and make them feel welcome during their period of waiting.
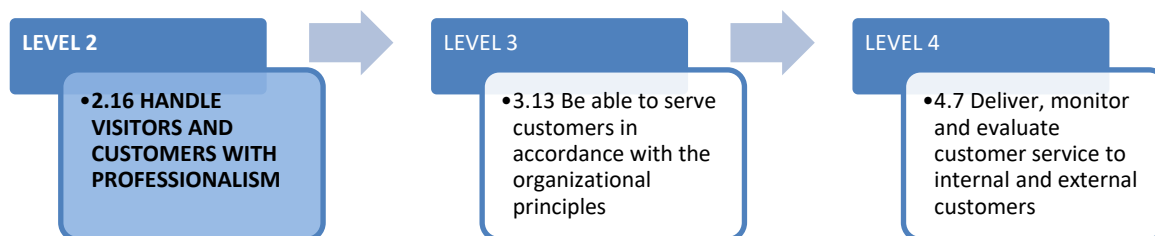
LO031 Demonstrate the ability to use appropriate tone of voice and body language when dealing with visitors and customers.

LO032 Demonstrate a basic understanding of customer care principles and be able to apply these in an effective way, including the ability to solve routine problems using simpler rules to the satisfaction of visitors and customers.

Knowledge, skills and competences covered in each of the learning outcomes are described in the Qualification framework.

THEME 16: VISITORS/ CUSTOMERS

This theme deals with abilities to welcome visitors and customers in a professional manner, use appropriate tone of voice and body language when dealing with visitors and customers, and learn a basic understanding of customer care   principles.

LEVEL 2	LEVEL 3	LEVEL 4
•2.16 HANDLE VISITORS AND CUSTOMERS WITH PROFESSIONALISM	•3.13 Be able to serve customers in accordance with the organizational principles	•4.7 Deliver, monitor and evaluate customer service to internal and external customers

UNIT 2.16 HANDLE VISITORS AND CUSTOMERS WITH PROFESSIONALISM

1) Short description

The Unit deals with deals with abilities to welcome visitors and customers in a professional manner, use appropriate tone of voice and body language when dealing with visitors and customers, and learn a basic understanding of customer care principles.

2) Suggested duration of the Unit (hours)

2.5 hours

3) Aims and objectives

By the end of the units, learners will be able to:
- Demonstrate professional manners when visitors and customers are visiting
- Use appropriate questions to discover the purpose of visit of customers or visitors
- Use techniques to make visitors feel welcome during their period of waiting.
- Use an appropriate tone of voice when dealing with different types of visitors) (e.g. angry visitor, regular visitor) and different situations (conflict resolution, persuasion etc.)
- Demonstrate the use of body language signals that are appropriate when dealing with visitors and customers in terms of eyes, hand gestures and feet.
- Demonstrate ability to apply simple customer care principles (e.g. support customers as a team, listen to customers and their feedback, don't be a robot, know your product)
- Use problem-solving techniques to solve common problems using simple rules to the satisfaction of visitors and customers.

Intellectual Output 6 EUPA Training Curricula level 2

4) Content of the Unit

Section 1: Handle visitors [0.5 hours]
- Needs and expectations
- Service quality
- types of service
- Attitudes towards the customer
- Make the customer feel at home
- waiting area

Section 2: Communication [1 hour]
- Internal and External Communication
- Message details
- Voice characteristics
- Practical advice regarding the voice
- Our voice – tone of voice

Section 3: Body language [1 hour]
- Body language
- Non-verbal communication
- Words – Meaning

5) Methodology to be used during the training of Unit 2.16

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 1: Handle visitors **Duration:** 0.5 hours	☒ Lecture ☒ Role play ☒ Group discussion	☒ Projector ☒ Laptop	• **EUPA_LO_030_M_001 Handle visitors** • **EUPA_LO_030_M_002 Different types of customers, always professional**
Section 3: Body language **Duration:** 1 hour	☒ Lecture ☒ Role Play	☒ Projector ☒ Laptop	• **EUPA_LO_031_M_001 Body language**
Section 2: Communication **Duration:** 1 hour	☒ Lecture ☒ Creative Group Work	☒ Projector ☒ Laptop	• **EUPA_LO_032_M_001 A picture for customer care**

Work Area 9: ICT Skills

Themes in the work area

The following themes are included in the work area ICT Skills for level 2.

Theme 17: Word Processing

Theme 18: Spreadsheets

Theme 19: Presentations

Theme 20: Internet

Theme 21: Emails

Units in the work area

The following Units are included in the work area "ICT Skills" for level 2.

Unit 2.17 Use word processing software to produce simple routine document

Unit 2.18 Use spreadsheets to produce simple routine sheets

Unit 2.19 Use presentation software to produce simple routine presentations

Unit 2.20 Use the internet to carry out simple tasks

Unit 2.21 Use email to carry out simple tasks

Short Description of the work area

At level two, the work area deals with three main issues namely:

1. Welcome visitors and customers in a professional manner.
2. Use appropriate tone of voice and body language when dealing with visitors and customers.

Intellectual Output 6 EUPA Training Curricula level 2

3. Basic understanding of customer care principles

Aim of the work area

It is the aim of the work area to provide the learners with the proper skills and competences in order to welcome visitors and customers in a professional manner, use appropriate tone of voice and body language when dealing with visitors and customers, and learn a basic understanding of customer care principles.

Learning outcomes in the work area

UNIT 2.17: Use word processing software to produce simple routine document

LO033 Demonstrate the ability to welcome visitors and customers in a professional manner, identify the purpose of their visit and make them feel welcome during their period of waiting.

UNIT 2.18: Use spreadsheets to produce simple routine sheets

LO034 Demonstrate ability to use a spreadsheet safely and securely to enter, edit and organise numerical and other data including simple formulas to meet the routine requirements of the office.

UNIT 2.19: Use presentation software to produce simple routine presentations

LO035 Demonstrate ability to use presentation software safely and securely to produce simple electronic presentations that meet the requirements of the office

UNIT 2.20: Use the internet to carry out simple tasks

LO036 Demonstrate ability to connect to internet sites safely and securely using browser software and search tools including identification of relevant business sites and communicating information online as required by the office.
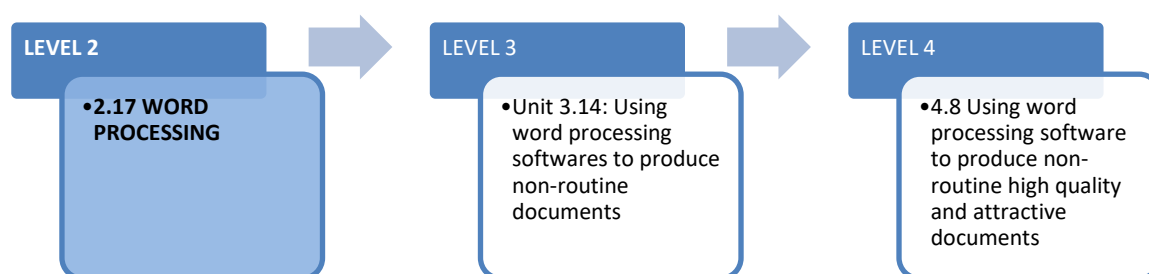
UNIT 2.21: Use email to carry out simple tasks

LO037 Demonstrate ability to use email software tools and techniques to compose and send messages; manage incoming email efficiently, safely and securely to meet the requirements of the office.

Knowledge, skills and competences covered in each of the learning outcomes are described in the Qualification framework.

This theme on level 2 has to do with the familiarization of learners with the basics of word processing.

LEVEL 2	LEVEL 3	LEVEL 4
•2.17 WORD PROCESSING	•Unit 3.14: Using word processing softwares to produce non-routine documents	•4.8 Using word processing software to produce non-routine high quality and attractive documents

UNIT 2.17: USE WORD PROCESSING SOFTWARE TO PRODUCE SIMPLE ROUTINE DOCUMENT

1) Short description

The Unit deals with the ability to use word processing software safely and securely to produce simple documents that meet the requirements of the office.

2) Suggested duration of the Unit (hours)

4 hours

3) Aims and objectives

By the end of the units, learners will be able to:

- Enter text and other information using layouts appropriate to the type of information.
- Create a simple text document safely and securely to meet the requirements of the office.
- Store and retrieve document files effectively, in line with local guidelines and conventions where available.
- Select and use appropriate templates for different purposes.
- Select and use appropriate techniques to format characters (bold, italics, underline) and paragraphs (margins and justification)
- Select and use appropriate page layouts to present and print documents (orientation, paper size, selection of printer)

4) Content of the Unit

Section 1: Microsoft office word introduction [0,5 hours]
- Introduction
- Microsoft Word environment

Intellectual Output 6 EUPA Training Curricula level 2

Section 2: Working with a document [1 hour]

- Create a new document in Word
- Enter text in a new document
- Save, close and open a document

Section 3: Formatting text and paragraph [1,5 hours]

- Select and Format text
- Select and delete a text
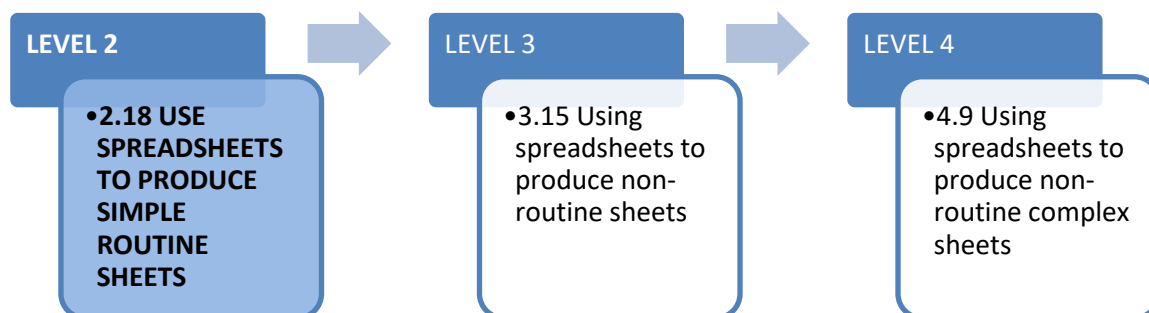- Formatting a Paragraph

Section 4: Templates [1 hour]

- Explanation of templates
- Advantages of using a template

5) Methodology to be used during the training of Unit 2.17

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 1: Microsoft office word introduction **Duration:** 0,5 hours	☒ Lecture ☒ Practical Exercise	☒ Projector ☒Laptop	
Section 2: Working with a document **Duration:** 1 hour	☒ Lecture ☒ Practical Exercise	☒ Projector ☒Laptop	
Section 3: Formatting text and paragraph **Duration:** 1,5 hours	☒ Lecture ☒ Practical Exercise	☒ Projector ☒Laptop	
Section 4: Templates **Duration:** 1 hour	☒ Lecture ☒ Practical Exercise	☒ Projector ☒Laptop	• **EUPA_LO_033_M_001 Create document**

THEME 18: SPREADSHEETS

This theme on level 2 has to do with the familiarization of learners with the basics of spreadsheets.

LEVEL 2	LEVEL 3	LEVEL 4
• 2.18 USE SPREADSHEETS TO PRODUCE SIMPLE ROUTINE SHEETS	• 3.15 Using spreadsheets to produce non-routine sheets	• 4.9 Using spreadsheets to produce non-routine complex sheets

UNIT 2.18: USE SPREADSHEETS TO PRODUCE SIMPLE ROUTINE SHEETS

1) Short description

The Unit deals with the ability to use spreadsheets to produce simple routine sheets that meet the requirements of the office.

2) Suggested duration of the Unit (hours)

6 hours

3) Aims and objectives

By the end of the units, learners will be able to:

- Create a simple spreadsheet safely and securely to enter, edit, organise, and manually format numerical and other data.
- Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available.
- Select and use appropriate templates for different purposes.
- Select and use appropriate techniques to format characters (bold, italics, underline) as well as spreadsheet cells, rows, columns and worksheets.
- Select and use appropriate page layouts to present and print spreadsheets (orientation, paper size, selection of printer)
- Select and use simple formulas (sum, average, count, min, and max). and data analysis tools (sort and filter) to meet the routine requirements of the office
- Select and develop an appropriate chart or graph from a readymade table (e.g. line, column and pie chart)

4) Content of the Unit

Section 1: Microsoft Excel Environment [0,5 hours]

- Excel worksheets and workbooks
- Save and Save as
- Insert, move, and rename
- The Views of your sheets
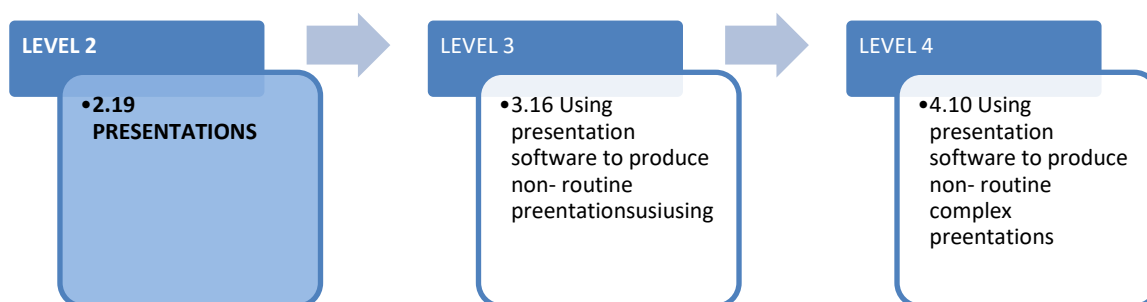
Section 2: Working with excel sheet [0,5 hours]

- Smart tools
- Commands
- Adding Data with the Fill Handle
- Formatting
- "Formulas Tab"
- Print

5) Methodology to be used during the training of Unit 2.18

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 1: Microsoft Excel Environment **Duration:** 0,5 hours	☒ Lecture	☒ Projector ☒ Laptop	
Section 2: Working with excel sheet **Duration:** 0,5 hours	☒ Lecture ☒ Exercise using ICT	☒ Projector ☒ Laptop	• **EUPA_LO_034_M_01 Practice the creation of spreadsheets with formulas**

THEME 19: PRESENTATIONS

This theme on level 2 has to do with the familiarization of learners with the basics of presentations.

LEVEL 2	LEVEL 3	LEVEL 4
•2.19 PRESENTATIONS	•3.16 Using presentation software to produce non- routine preentationsusiusing	•4.10 Using presentation software to produce non- routine complex preentations

UNIT 2.19: PRESENTATIONS

1) Short description

The Unit deals with the ability to use presentation software safely and securely to produce simple electronic presentations that meet the requirements of the office

2) Suggested duration of the Unit (hours)

2 hours

3) Aims and objectives

By the end of the units, learners will be able to:

- Create a simple presentation safely and securely to enter, edit and organise information on slides.
- Store and retrieve presentation files effectively, in line with local guidelines and conventions where available.
- Select, change and use appropriate templates for slides for different purposes.
- Enter text and other information using layouts appropriate to the type of information.
- Select and use appropriate techniques to format characters as well as slides (change layout).
- Insert simple charts and tables into presentation slides.
- Select and use appropriate views (handouts, slideshow etc.)
- Print different versions of the presentation (slides, handouts etc.)
- Describe how to present slides to meet needs and communicate effectively.
- Operate the presentation software safely and securely to produce simple electronic presentations that meet the requirements of the office

4) Content of the Unit

Section 1: Microsoft PowerPoint environment [1 hour]

- Microsoft PowerPoint
- A quick walkthrough of the PowerPoint 2007 interface
- Slides
- Saving, closing and opening a presentation

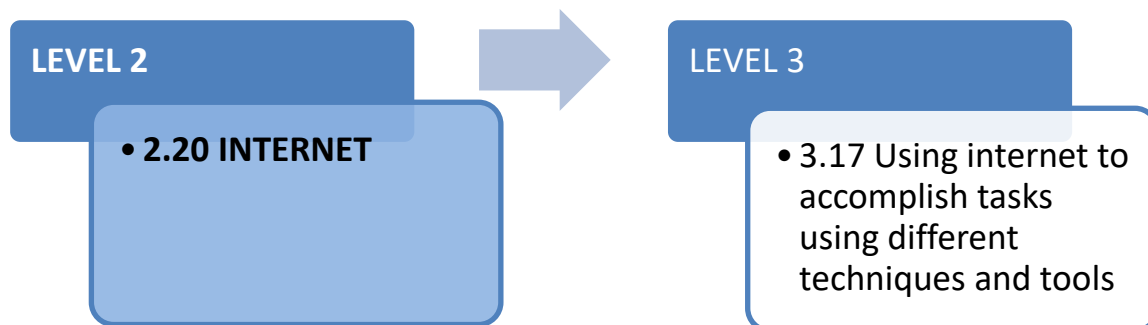**Section 2: Creating a simple presentation [1 hour]**

- Creating a simple presentation

5) Methodology to be used during the training of Unit 2.19

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 1: Microsoft PowerPoint environment **Duration:** 1 hour	☒ Lecture	☒ Projector ☒ Laptop	
Section 2: Creating a simple presentation **Duration:** 1 hour	☒ Lecture ☒ Exercise using ICT	☒ Projector ☒ Laptop	• **EUPA_LO_035_M_001 Creating a professional presentation**

THEME 20: INTERNET

This theme on level 2 has to do with the familiarization of learners with the basics of Internet.

LEVEL 2	→	LEVEL 3
• **2.20 INTERNET**		• 3.17 Using internet to accomplish tasks using different techniques and tools

UNIT 2.20: INTERNET

1) Short description

The Unit deals with the ability to connect to internet sites safely and securely using browser software and search tools including identification of relevant business sites and communicating information online as required by the office.

2) Suggested duration of the Unit (hours)

2 hours

3) Aims and objectives

By the end of the units, learners will be able to:

- Connect to internet and link to relevant business sites safely and securely using browser software
- Use search engines applying effective searching techniques such as keywords, minus operator, plus operator, the tilde operator, OR operator etc.
- Solve routine connection problems using simple tools and rules.
- Post on different social media and update different management platforms

4) Content of the Unit

Section 1: Internet introduction [1 hour]

- Introduction
- How can we connect?

Intellectual Output 6 EUPA Training Curricula level 2

- How to use the Internet safely and securely

- The use of the Internet

- Environment of the Internet Explorer Window

- Search engines

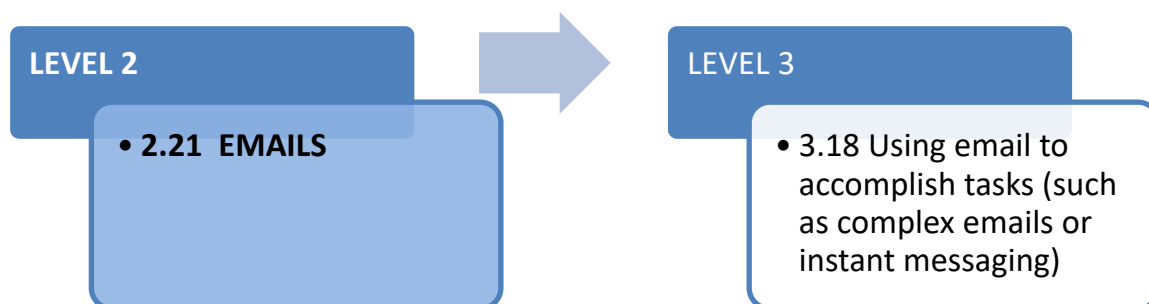**Section 2: The use of the Internet for your daily work [1 hour]**

- How to solve routine connection problems

- Social Media

5) Methodology to be used during the training of Unit 2.20

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 1: Internet introduction **Duration:** 1 hour	☒ Lecture	☒ Projector ☒ Laptop	
Section 2: The use of the internet for your daily work **Duration:** 1 hour	☒ Lecture ☒ Exercise using ICT	☒ Projector ☒ Laptop	• **EUPA_LO_036_M_039 Internet**

THEME 21: EMAILS

This theme on level 2 has to do with the familiarization of learners with the basics of emails.

LEVEL 2	LEVEL 3
• 2.21 EMAILS	• 3.18 Using email to accomplish tasks (such as complex emails or instant messaging)

UNIT 2.21: EMAILS

1) Short description

The Unit deals with the ability to use email software tools and techniques to compose and send messages; manage incoming email efficiently, safely and securely to meet the requirements of the office.

2) Suggested duration of the Unit (hours)

2 hours

3) Aims and objectives

By the end of the units, learners will be able to:

- Compose and send messages including subject, signature, priority and taking into consideration basic writing principles as well as grammar and spelling rules.
- Set notifications for email read and receipt
- Manage incoming mail efficiently by creating folders and subfolders and moving email to those manually.

4) Content of the Unit

Section 1: Email Environment [1 hour]

- Sending emails buttons
- Web mail

Section 2: The Outlook Environment [1 hour]

- Send Email from Outlook - Environment
- Basic Keyboard Shortcuts for Outlook 2007

Intellectual Output 6 EUPA Training Curricula level 2

- Print a message
- Security

5) Methodology to be used during the training of Unit 2.21

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 1: Email environment **Duration:** 1 hour	☒ Lecture	☒ Projector ☒ Laptop	
Section 2: The Outlook Environment **Duration:** 1 hour	☒ Lecture ☒ Written Exercise ☒ Exercise using ICT	☒ Projector ☒ Laptop	• **EUPANEXT_LO_037_M_001 Email**

Work Area 12: Numeric Skills

Themes in the work area

The following themes are included in the work area "Numeric skills" for level 2.

Theme 22: Numeric Skills

Units in the work area

The following Units are included in the work area " Numeric skills" for level 2.

2.22 Make basic mathematical calculations

Short Description of the work area

At level two, the work area deals with one main issue namely the ability of learners to apply, basic mathematical calculations in simple business situations.

Aim of the work area

It is the aim of the work area to make the learners familiar with the proper use of effective forms of written communication by enabling them to produce different routine business documents and communicate in an adequate way for the business environment.
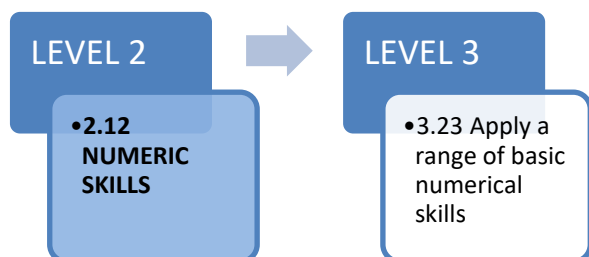
Learning outcomes in the work area

Unit 2.22: Make basic mathematical calculations

- LO038 Demonstrate knowledge of, and the ability to apply, basic mathematical calculations in simple business situations (e.g. calculate discount or vat).

Knowledge, skills and competences covered in each of the learning outcomes are described in the Qualification framework.

THEME 12: NUMERIC SKILLS

Being familiar with the terminology of numeric skills is crucial for the smooth performance of the office. This theme at this level is concerned with the production of routine documents in predictable situations.

LEVEL 2	→	LEVEL 3
•2.12 NUMERIC SKILLS		•3.23 Apply a range of basic numerical skills

UNIT 2.22: MAKE BASIC MATHEMATICAL CALCULATIONS

1) Short description

The Unit deals with making the learners familiar in order to apply, basic mathematical calculations in simple business situations (e.g. calculate discount or vat).

2) Suggested duration of the Unit (hours)

1 hour

3) Aims and objectives

After the completion of the unit, learners will be able to:

- Demonstrate ability to apply, basic mathematical calculation to accomplish simple business tasks (e.g. calculate discount or VAT).

4) Content of the Unit

Section 1: Basic mathematical calculations [0,5 hours]
- Basic mathematical calculations

Section 2: Application for PAs [0,5 hours]
- Calculating a discount
- Calculating VAT

5) Methodology to be used during the training of Unit 2.22

Section Title:	Training Methodology:	Training Equipment:	Training and Methodological tools:
Section 1: Basic mathematical calculations **Duration:** 0,5 hours	☒ Lecture	☒ Projector ☒ Laptop	
Section 2: Application for PAs **Duration:** 0,5 hours	☒ Lecture ☒ Written exercise	☒ Projector ☒ Laptop	• **EUPANEXT_LO_038_M_001 Basic mathematical calculations**