

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



IMA  
International  
Management Assistants



Erasmus+

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## Contents

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1. INTRODUCTION TO EUPA_NEXT TRAINING CURRICULUM LEVEL 2 .....	6
2. A MAP OF THE TRAINING MATERIALS DEVELOPED BY EUPA_NEXT .....	7
3. RECOMMENDATIONS FOR PARTICIPATION .....	8
4. CERTIFICATION .....	8
 WORK AREA 1: OFFICE PROCEDURES .....	 9
THEME 1: MAIL .....	9
Unit 2.1: Handle the Mail .....	9
THEME 2: STOCK .....	10
Unit 2.2: Handle the stock .....	10
 WORK AREA 2: OFFICE EQUIPMENT AND TECHNOLOGY.....	 11
THEME 3: OFFICE EQUIPMENT .....	11
Unit 2.3: Use of office equipment to carry out simple tasks including simple troubleshooting .....	11
 WORK AREA 3: COMMUNICATION AND SOCIAL, TELEPHONE HANDLING, CODE OF CONDUCT, EQUAL OPPORTUNITIES AND RELATIONS .....	 12
THEME 4: BUSINESS COMMUNICATION .....	12
Unit 2.4: Use of business communication skills clearly and effectively .....	12
THEME 5: TELEPHONE TECHNIQUES.....	13
Unit 2.5: Use telephone techniques effectively .....	13
THEME 6: CODE OF CONDUCT AND EQUAL OPPORTUNITIES.....	14
Unit 2.6: Understand and apply code of conduct according to organizational principles .....	14
THEME 7: RELATIONSHIPS.....	15

Intellectual Output 6 Training Curricula level 2

Unit 2.7: Recall and apply key principles of good relationships with customers, external stakeholders and colleagues in a clear and effective way.....	15
<b>WORK AREA 4: WRITTEN COMMUNICATION .....</b>	<b>16</b>
<b>THEME 8: WRITTEN COMMUNICATION .....</b>	<b>16</b>
Unit 2.8: Use written communication skills to produce a variety of routine business documents .....	16
<b>WORK AREA 5: FILING SYSTEM DOCUMENTATION AND DATABASES.....</b>	<b>17</b>
<b>THEME 9: FILING .....</b>	<b>17</b>
Unit 2.9: Use filing skills to maintain an established system .....	17
<b>THEME 10: BUSINESS DOCUMENTS.....</b>	<b>18</b>
Unit 2.10: Business documents.....	18
<b>THEME 11: DATABASES.....</b>	<b>19</b>
Unit 2.11: Use basic database skills to enter information in a database .....	19
<b>WORK AREA 6: BOOKKEEPING, ACCOUNTING AND FINANCIAL TRANSACTIONS .....</b>	<b>20</b>
<b>THEME 12: ACCOUNTING.....</b>	<b>20</b>
Unit 2.12: Perform routine business transactions.....	20
<b>WORK AREA 7: BUSINESS TRAVEL, DIARY SYSTEMS, MEETING ORGANISATION AND EVENT MANAGEMENT .....</b>	<b>21</b>
<b>THEME 13: BUSINESS TRAVEL AND ACCOMMODATION.....</b>	<b>21</b>
Unit 2.13 Recommend business travel and accommodation arrangements and prepare relevant documentation .....	21
<b>THEME 14: MEETINGS.....</b>	<b>22</b>
Unit 2.14 Prepare for a routine meeting (including meeting documentation.....	22
<b>THEME 15: DIARY SYSTEMS .....</b>	<b>23</b>
Unit 2.15: Use diary systems for routine business purposes .....	23
<b>WORK AREA 8: VISITORS/ CUSTOMER SERVICE.....</b>	<b>24</b>

Intellectual Output 6 Training Curricula level 2

<b>THEME 16: VISITORS/ CUSTOMERS .....</b>	<b>24</b>
Unit 2.16 Handle visitors and customers with professionalism.....	24
 <b>WORK AREA 9: ICT SKILLS .....</b>	 <b>25</b>
<b>THEME 17: WORD PROCESSING .....</b>	<b>25</b>
Unit 2.17: Use word processing software to produce simple routine document.....	25
<b>THEME 18: SPREADSHEETS .....</b>	<b>26</b>
Unit 2.18: Use spreadsheets to produce simple routine sheets .....	26
<b>THEME 19: PRESENTATIONS .....</b>	<b>27</b>
Unit 2.19: Presentations .....	27
<b>THEME 20: INTERNET .....</b>	<b>28</b>
Unit 2.20: Internet.....	28
<b>THEME 21: EMAILS.....</b>	<b>29</b>
Unit 2.21: Emails .....	29
 <b>WORK AREA 10: NUMERIC SKILLS.....</b>	 <b>30</b>
<b>THEME 12: NUMERIC SKILLS .....</b>	<b>30</b>
Unit 2.22: Make basic mathematical calculations .....	30

## 1. Introduction to Eupa\_Next Training Curriculum Level 2

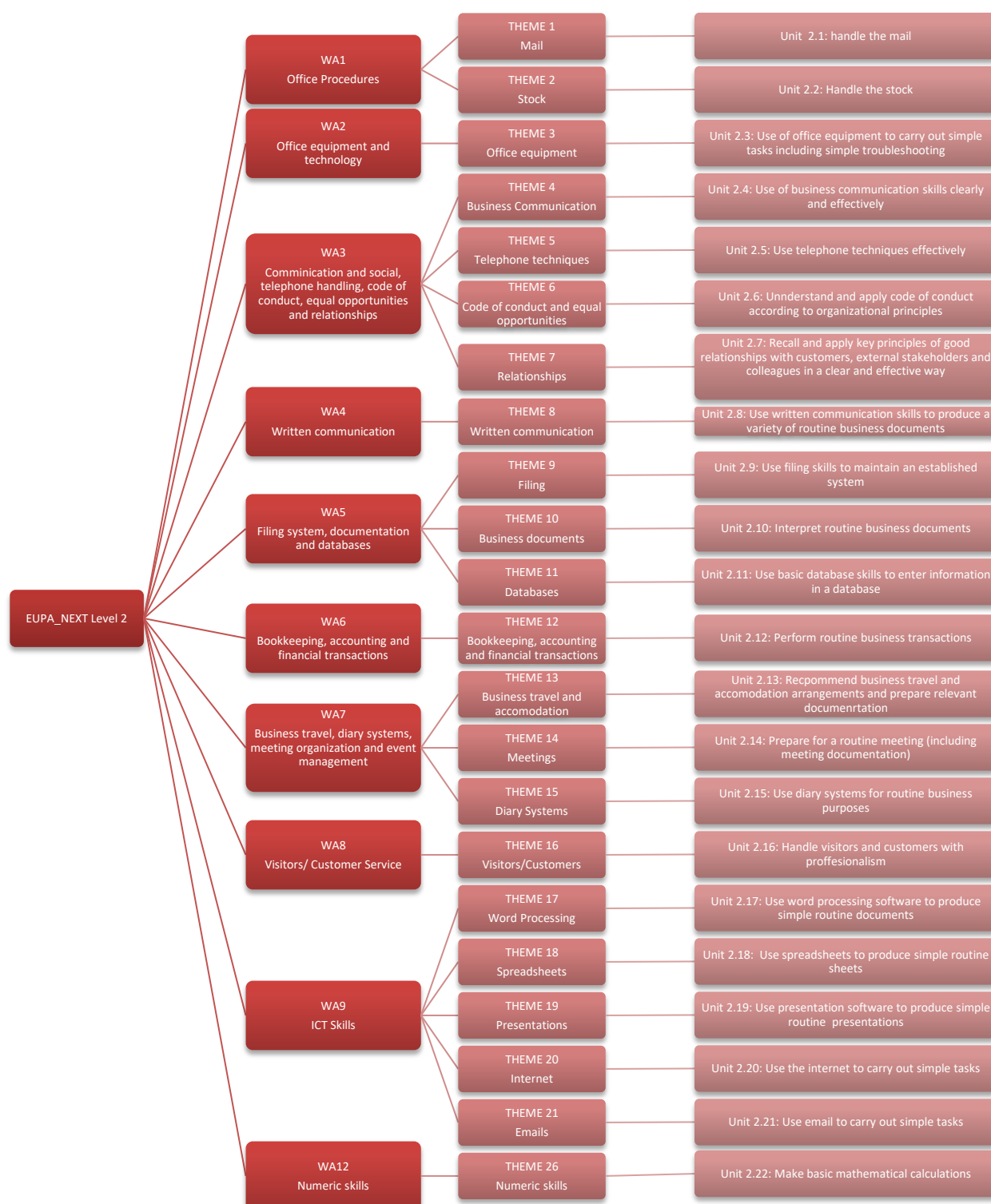
The EUPA\_NEXT training curriculum follows the modular philosophy and is compatible with the Qualification Framework that has been developed previously. It is structured in Work Areas, each covering different topic. Work areas are then defined as sets of units that cover the knowledge, skills and competences for one or more learning outcomes.

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.

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.

	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

## 2. A map of the training materials developed by EUPA\_NEXT



### 3. Recommendations for participation

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

### 4. Certification

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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

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### THEME 1: MAIL

#### UNIT 2.1: HANDLE THE MAIL

##### Unit 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.

##### Suggested duration:

5 hours

##### Aims and objectives

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

- Discuss the issues involved in handling mail such as sorting, prioritisation, confidentiality issues etc.
- Describe and apply company policies for handling mail
- Apply guidelines for data protection and confidential documents
- List different mail services
- Maintain the address database

##### Content of the Unit:

- Section 1: What is mail and why it is important [1 hour]
- Section 2: Handling incoming mail [2 hours]
- Section 3: Handling outgoing mail [2 hours]

## THEME 2: STOCK

### UNIT 2.2: HANDLE THE STOCK

#### Unit description:

The Unit 2.2 focuses on the ability to handle the stock control procedures as well as to maintain the right level of stock in order to run the office smoothly by using specific procedures and tools.

#### Suggested duration:

4 hours

#### 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
- Describe different stock monitoring methods

#### Content of the Unit:

- Section 1: Organisational procedures for handling stock [1 hour]
- Section 2: Reasoning for stock control [0,5 hours]
- Section 3: Stock monitoring methods [2,5 hours]

## WORK AREA 2: OFFICE EQUIPMENT AND TECHNOLOGY

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### THEME 3: OFFICE EQUIPMENT

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

##### Unit description:

The Unit 2.3 deals with the ability of learners to use the office equipment properly and efficiently to perform different business tasks including simple troubleshooting.

##### Suggested duration:

3 hours

##### 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

##### Content of the Unit:

- Section 1: Different types of equipment and their use [1 hour]
- Section 2: Appropriate use and maintenance of equipment [1 hour]
- Section 3: Simple troubleshooting [1 hour]

## WORK AREA 3: COMMUNICATION AND SOCIAL, TELEPHONE HANDLING, CODE OF CONDUCT, EQUAL OPPORTUNITIES AND RELATIONS

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### THEME 4: BUSINESS COMMUNICATION

#### UNIT 2.4: USE OF BUSINESS COMMUNICATION SKILLS CLEARLY AND EFFECTIVELY

##### Unit description:

The Unit 2.4 deals with the ability to apply the appropriate communication skills in 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 to be able to demonstrate competence in applying these principles in a clear and effective way.

##### Suggested duration:

4 hours

##### 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 and distinguish internal and external communication
- Explain how is information transmitted
- Describe body language
- List words that one should use and to avoid in communication
- 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
- Assess non-verbal signals of others and draw careful conclusions through combination of different signals or through combination of body language and voice

##### Content of the Unit:

- Section 1: Verbal and non-verbal communication [2 hours]
- Section 2: Proxemics, active listening, speaking [2 hours]

Intellectual Output 6 EUPA Training Curricula level 2

## THEME 5: TELEPHONE TECHNIQUES

### UNIT 2.5: USE TELEPHONE TECHNIQUES EFFECTIVELY

#### Unit description:

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

#### Suggested duration:

6 hours

#### Aims and objectives:

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

- Recall and apply 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
- 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
- Use effective telephone techniques to solve routine problems through the phone
- Filter the phone calls of colleagues based on instructions

#### Content of the Unit:

- Section 1: Introduction [1 hour]
- Section 2: Structure of a telephone call [1 hour]
- Section 3: Non-verbal communication [1,5 hours]
- Section 4: Verbal communication [2,5 hours]

## THEME 6: CODE OF CONDUCT AND EQUAL OPPORTUNITIES

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

#### Unit description:

The Unit will address important basic codes that apply to 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.

#### Suggested duration:

3 hours

#### 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 and follow the Organization's Code of Conduct

#### Content of the Unit:

- Section 1: Concept and basic aspects of a code of conduct [1,5 hours]
- Section 2: Code of conduct and appearance [1,5 hours]

## 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

#### Unit description:

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

#### Suggested duration:

4 hours

#### 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.

#### Content of the Unit:

- Section 1: Confidentiality in the workplace [1,5 hours]
- Section 2: Good relationships with internal & external stakeholders [2,5 hours]

## WORK AREA 4: WRITTEN COMMUNICATION

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### THEME 8: WRITTEN COMMUNICATION

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

##### Unit description:

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

##### Suggested duration:

3 hours

##### Aims and objectives:

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

- Describe the basic structure of written communication and the content of each part
- 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.
- Select the appropriate type of a document depending on different criteria
- Use language that suits the purpose and audience

##### Content of the Unit:

- Section 1: Different types of documents and basic principles of written communication [2 hours]
- Section 2: Use different techniques to present different types of information and adequate writing tone/terminology [2 hours]



## WORK AREA 5: Filing System Documentation and Databases

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### THEME 9: FILING

#### UNIT 2.9: USE FILING SKILLS TO MAINTAIN AN ESTABLISHED SYSTEM

##### Unit description:

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

##### Suggested duration:

4 hours

##### Aims and objectives:

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

- Explain different filing systems in the business world today
- Discuss techniques for maintaining an up to date filing system
- File physical and electronic documents in accordance to the filing system strategy of the organisation.
- Check whether the records (physical and electronic) are up to date.
- Locate a specific file or an electronic record.

##### Content of the Unit:

- Section 1: Introduction to filing Systems [1 hour]
- Section 2: Working with filing Systems [3 hours]

## THEME 10: BUSINESS DOCUMENTS

### UNIT 2.10: BUSINESS DOCUMENTS

#### Unit description:

The Unit deals with making the learners familiar in order to being capable to interpret routine business documents. To be able to handle them correctly.

#### Suggested duration:

2 hours

#### Aims and objectives:

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

- List and describe use of different types of business documents
- Explain and make entries of business documents
- Check, identify and correct errors in business documents
- Prepare business documents (invoice, order, credit note, etc.) according to the instructions autonomously under small supervision
- Sort the documents according to various criteria

#### Content of the Unit:

- Section 1: How to interpret routine business documents [1 hour]
- Section 2: Document entries [1 hour]

## THEME 11: DATABASES

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

#### Unit description:

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

#### Suggested duration:

1 hour

#### Aims and objectives:

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

- Explain a database and describe key principles of database systems
- Name different types of databases that a company may keep
- Explain the importance of accuracy in databases.
- Enter, edit and organize data in an existing electronic and manual database system.
- Check a database for accuracy, identify missing information and correct the database.
- Maintain an existing database system autonomously under small supervision.
- Describe methods of keeping the database up to date.

#### Content of the Unit:

- Section 1: Introduction to basic Database [0,5 hours]
- Section 2: How to work with a database [0,5 hours]

## WORK AREA 6: Bookkeeping, Accounting and Financial Transactions

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### THEME 12: ACCOUNTING

#### UNIT 2.12: PERFORM ROUTINE BUSINESS TRANSACTIONS

##### Unit 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).

##### Suggested duration:

1.5 hours

##### 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

##### Content of the Unit:

- Section 1: Business Transactions [0,5 hours]
- Section 2: Financial documents and payment procedures [1 hour]

## WORK AREA 7: Business Travel, Diary Systems, Meeting Organisation and Event Management

### THEME 13: BUSINESS TRAVEL AND ACCOMMODATION

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

##### Unit 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

##### Suggested duration:

3 hours

##### 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 handing 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.

##### Content of the Unit:

- Section 1: Travelling basics [0,5 hours]
- Section 2: Before and during the trip [1 hour]
- Section 3: During and after travelling [1,5 hours]

## THEME 14: MEETINGS

### UNIT 2.14 PREPARE FOR A ROUTINE MEETING (INCLUDING MEETING DOCUMENTATION)

#### Unit 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.

#### Suggested duration:

3 hours

#### Aims and objectives:

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

- Explain the role of the person preparing a meeting.
- Describe the different types of meetings and their main features.
- Organize a routine meeting by liaising with the Chair of the meeting for any organisational matters
- Explain how to identify suitable venues for different types of meetings.
- Describe the types of resources needed for different types of meetings.
- Attend to any requirements during the meeting as directed by the meeting organiser
- Create first draft version of meeting agenda, to be reviewed by the meeting chair
- Collect the feedback questionnaires and evaluate them with routine computer programme
- Complete post meeting documentation with autonomy in cooperation with the chair of the meeting, and provide participants with individual tailor-made packages.

#### Content of the unit:

- Section 1: Basics of company meetings [0,5 hours]
- Section 2: Preparation of meeting [1 hour]
- Section 3: Support during the meeting [0,5 hours]
- Section 4: Post-meeting actions [1 hour]

## THEME 15: DIARY SYSTEMS

### UNIT 2.15: USE DIARY SYSTEMS FOR ROUTINE BUSINESS PURPOSES

#### Unit 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

#### Suggested duration:

5 hours

#### 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.

#### Content of the Unit:

- Section 1: Introduction [1 hour]
- Section 2: Electronic diary systems [1,5 hours]
- Section 3: Manual diary systems [1,5 hours]
- Section 4: Daily Work and Diary Systems [1 hour]

## WORK AREA 8: Visitors/ Customer Service

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### THEME 16: VISITORS/ CUSTOMERS

#### UNIT 2.16 HANDLE VISITORS AND CUSTOMERS WITH PROFESSIONALISM

##### Unit 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.

##### Suggested duration:

2.5 hours

##### 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 and different situations
- 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
- Use problem-solving techniques to solve common problems using simple rules to the satisfaction of visitors and customers.

##### Content of the Unit:

- Section 1: Handle visitors [0.5 hours]
- Section 2: Communication [1 hour]
- Section 3: Body language [1 hour]



### THEME 17: WORD PROCESSING

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

##### Unit 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.

##### Suggested duration:

4 hours

##### 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 and paragraphs
- Select and use appropriate page layouts to present and print documents

##### Content of the Unit:

- Section 1: Microsoft office word introduction [0,5 hours]
- Section 2: Working with a document [1 hour]
- Section 3: Formatting text and paragraph [1,5 hours]
- Section 4: Templates [1 hour]

## THEME 18: SPREADSHEETS

### UNIT 2.18: USE SPREADSHEETS TO PRODUCE SIMPLE ROUTINE SHEETS

#### Unit description:

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

#### Suggested duration:

6 hours

#### 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 as well as spreadsheet cells, rows, columns and worksheets.
- Select and use appropriate page layouts to present and print spreadsheets
- Select and use simple formulas and data analysis tools to meet the routine requirements of the office
- Select and develop an appropriate chart or graph from a readymade table

#### Content of the Unit:

- Section 1: Microsoft Excel Environment [0,5 hours]
- Section 2: Working with excel sheet [0,5 hours]

## THEME 19: PRESENTATIONS

### UNIT 2.19: PRESENTATIONS

#### Unit 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

#### Suggested duration:

2 hours

#### 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
- Print different versions of the presentation
- 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

#### Content of the Unit:

- Section 1: Microsoft PowerPoint environment [1 hour]
- Section 2: Creating a simple presentation [1 hour]

## THEME 20: INTERNET

### UNIT 2.20: INTERNET

#### Unit 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.

#### Suggested duration:

2 hours

#### 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

#### Content of the Unit:

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

## THEME 21: EMAILS

### UNIT 2.21: EMAILS

#### 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.

#### Suggested duration:

2 hours

#### 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.

#### Content of the Unit:

- Section 1: Email Environment [1 hour]
- Section 2: The Outlook Environment [1 hour]

## Work Area 10: Numeric Skills

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### THEME 12: NUMERIC SKILLS

#### UNIT 2.22: MAKE BASIC MATHEMATICAL CALCULATIONS

##### Unit description:

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

##### Suggested duration:

1 hour

##### Aims and objectives:

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

- Describe four basic mathematical calculations (additions, subtraction, multiplication and division)
- List situations where each of the calculations is used in everyday life as well as in business life.
- Apply basic mathematical calculation to accomplish simple business tasks (e.g. calculate discount or VAT).

##### Content of the Unit:

- Section 1: Basic mathematical calculations [0,5 hours]
- Section 2: Application for PAs [0,5 hours]

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