

## **Unit 25: Produce Business Documents**

**Unit reference number:** **Y/506/1809**

**QCF level:** **2**

**Credit value:** **3**

**Guided learning hours:** **24**

**Unit type:** **Competence**

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### **Unit summary**

A key part of the role of business administrator is to produce documents that are fit for purpose, that are accurate, and that comply with organisational guidelines. The documents may need to be produced in different software packages so you will need to have a good understanding of the IT software that the organisation uses.

In this unit you will learn how to produce documents that are fit for purpose, that are free from errors in spelling and grammar, and that meet the requirements of the intended audience. You will have the opportunity to explore the organisation's procedures on version control and security of documentation, and to follow organisational requirements in relation to styles, fonts and formatting.

## Learning outcomes and assessment criteria

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria outline the requirements the learner is expected to meet to achieve the unit.

Learning outcomes	Assessment criteria
1 Understand how to prepare business documents	<ul style="list-style-type: none"><li>1.1 Explain the requirements for language, tone, image and presentation for different documents</li><li>1.2 Explain how to integrate images into documents</li><li>1.3 Describe how corporate identity impacts upon document production</li><li>1.4 Explain the requirements of data protection, copyright and intellectual property legislation relating to document production</li><li>1.5 Describe organisational procedures for version control</li><li>1.6 Describe security requirements relating to document production</li></ul>
2 Be able to prepare business documents	<ul style="list-style-type: none"><li>2.1 Identify the purpose, audience, content, style, format and deadlines of a document</li><li>2.2 Use document production resources in line with organisational guidelines</li><li>2.3 Use correct grammar, spelling, punctuation and sentence structure</li><li>2.4 Produce documents that meet the requirements within the agreed timescale</li></ul>
3 Be able to distribute business documents	<ul style="list-style-type: none"><li>3.1 Provide final documents in the appropriate medium for authorised readers</li><li>3.2 Specify restrictions and distribution lists in accordance with the requirements</li><li>3.3 Maintain the requirements of security in the production, distribution and storage of documents</li></ul>

## Unit amplification

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### **AC1.1: Explain the requirements for language, tone, image and presentation for different documents**

- *Language*: document aimed at the correct audience; avoid technical terms that the audience may not understand
- *Tone*: formal, e.g. avoid using slang, use full sentences
- *Image and presentation*: spelling, grammar and punctuation are accurate; corporate guidelines have been followed
- *Documents*: business letters, reports, emails, minutes of minutes, instructions, newsletters

### **AC1.2: Explain how to integrate images into documents**

- *Integrate images into documents*: choosing the correct image to suit the topic within the document; image fit for purpose, e.g. picture, video; ensuring image can be viewed easily by audience

### **AC1.3: Describe how corporate identity impacts upon document production**

- *Corporate identity*: following corporate guidelines on fonts, styles etc ensures standardisation of documentation across the organisation; portraying a consistent image of the organisation; using specific house styles and structures appropriate to the organisation
- *Impact*: document production may take longer; other people/departments may need to be involved; agreement needed from multiple parties

### **AC1.4: Explain the requirements of data protection, copyright and intellectual property legislation relating to document production**

- *Data protection (Data Protection Act 1998)*: information is fairly and accurately processed (information is processed for limited purposes, information is processed in line with an individual's rights, information is stored appropriately); document may need to be authorised by a manager; produced and communicated on a secure system
- *Copyright (Copyright, Designs and Patents Act 1988)*: permission to use copyrighted material (copyright licence in place, special copyright conditions); authorisation by manager/other departments may need to be sought
- *Intellectual property*: agreements covering ownership of materials; authorisation by manager/other departments may need to be sought

**AC1.5: Describe organisational procedures for version control**

*The knowledge to meet this AC depends on the particular organisational requirements and context. Learners need to apply the knowledge specific to their organisation to meet this AC*

- *Version control procedures may include:* numbering each version of a document; using version control tables; use of 'Draft' watermark; preventing editing of approved documents

**AC1.6: Describe security requirements relating to document production**

- *Security:* information does not breach security protocols; if security is breached production may need to be minimised or stopped; storing of business documents, e.g. rooms either locked or with restricted access; protecting documents, e.g. password protection, read-only access; use a screen filter on the computer screen

## Information for tutors

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### Suggested resources

#### Books

Carysforth C – *Administration NVQ Level 2* (Heinemann, 2006)  
ISBN 9780435463335

Sutherland J and Sutherland D – *Business and Administration NVQ Level 2* (Hodder Education, 2011) ISBN 9781444144208

#### Assessment

This unit is internally assessed. To pass this unit the evidence that the learner presents for assessment must demonstrate that they have met the required standard specified in the learning outcomes and assessment criteria and the requirements of the Assessment Strategy.

To ensure that the assessment tasks and activities enable learners to produce valid, sufficient, authentic and appropriate evidence that meet the assessment criteria, centres should apply the *Unit assessment guidance* provided and the requirements of the Assessment Strategy given below.

Wherever possible, centres should adopt a holistic approach to assessing the units in the qualification. This gives the assessment process greater rigour and minimises repetition, time and the burden of assessment on all parties involved in the process.

#### Unit assessment requirements

This unit must be assessed in the workplace in accordance with the Skills CFA Assessment Strategy for Business Administration, Customer Service and Management and Leadership in *Annexe A*. Simulation is not allowed for this unit. All evidence of occupational competence should be generated through performance under workplace conditions; this includes evidence of achievement for knowledge-based learning outcomes and associated assessment criteria.

## **Unit assessment guidance**

This guidance supports assessors in making decisions about how best to assess each unit and the evidence needed to meet the assessment requirements. Centres can adapt the guidance for learners and the particular assessment context, as appropriate.

The main source of evidence for demonstrating the achievement of learning outcome 2 and learning outcome 3 is a combination of direct observation of the learner using available technology to produce business documents, examination of the learner's work products and question and answer (Q&A) sessions. The learner's work products could include a range of business documents such as letters, emails, newsletters and presentations as well as the learner's planning notes. The work products should be reviewed by the assessor to check for accurate spelling, grammar and sentence construction as well as formatting and styling appropriate to the purpose of the document (AC2.1, AC2.3 and AC2.4). Witness testimony could be used to confirm consistent performance as well as provide supporting evidence AC2.4, AC3.1 and AC3.3.

Question and answer (Q&A) sessions should be used to provide further evidence for AC2.2, AC3.2 and AC3.3. For example, the learner could be asked to explain how they identified the restrictions and distribution list for particular documents produced and how they met the requirements for security in the production, distribution and storage of the documents produced. Alternatively, a learner diary could be used to provide this evidence.

Question and answer (Q&A) sessions or learner diary could be used to meet the requirements of learning outcome 1. If Q&A is used then it should be integrated with the assessment for learning outcome 2 and learning outcome 3 to provide the opportunity for the learner to link and apply their knowledge to their workplace activities. There are good opportunities to relate the assessment of the knowledge requirements to the competence activities. For example, the learner could explain how to integrate images in a document while they are producing a document and, if appropriate, they could use the document to describe how corporate identity impacts on its production (AC1.2 and AC1.3). If a learner diary is used, then the entries should be contextualised to the completed documents to link and apply the knowledge requirements in a similar manner as with the Q&A. The learner's answers must have sufficient range and breadth to meet the requirements. For example, the response for AC1.4 must have sufficient detail about the different legal requirements that affect the production of business documents. As some of the assessment criteria refer to organisational requirements and procedures, witness testimony may also be required to verify the learner's evidence.

Evidence of Recognition of Prior Learning (RPL) can also be used within the unit to confirm competence. Wherever possible, the learning outcomes in this unit should be assessed holistically across the qualification.