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Contents

Digital resources, consisting of practice practical tasks and a practice assignment, are available to download at **www.hoddergibson.co.uk/higher-admin-tasks**

Introduction

Higher Administration and IT has two parts: the theory element of the course, which is worth 50 marks and is assessed via a written exam to be completed within one hour and 30 minutes, and the IT element of the course, which is out of 70 marks and is assessed via an assignment which is done under assessment conditions within two hours.

Unit 1 of this book covers Administrative Theory and Practice. The theory chapters contain the information you need to pass the written exam. These chapters include the following features:

- **Key term –** an explanation of words used in the text
- **Top tip –** a key point for you to remember from that outcome
- **Study tip –** ideas for how to study and revise that outcome
- **What you need to know –** a checklist for that outcome
- **Study activities for this outcome –** give you the opportunity to practise what you have learnt
- **Case study –** a real-life case study with scaffolded questions of increasing difficulty (Building, Strengthening and Extending) to test knowledge and skills

A practice written exam-style question paper can be found at the end of this book. You can uses this to test your knowledge and understanding of the theory elements of the course.

Suggested solutions to the case studies and the practice exam paper are provided in a separate section of the book.

The practical element of the course is covered in Unit 2. These chapters contain simple step-by-step approaches that are clear for you to understand. The chapters contain the following features:

- **Command word tip –** key words that you might encounter in exam questions. They have only been included in chapters where the exam board has asked a theory question based on the practical in previous question papers.
- **Exam tip –** key points to help you study for your exam.
- **Top tip –** key points for you to remember.

Knowledge and understanding of the practical elements of the course can be tested using the digital resources available to download at **www.hoddergibson.co.uk/higher-admin-tasks** These resources include practice practical tasks, as well as a **practice exam-style assignment.**

Why study Higher Administration and IT?

Here are some quotes from former students about their experience studying the course:

'I never did Administration and IT until I was in S6. I tended to pick Graphic Communication and Art subjects. By doing Administration and IT at Higher and passing, when I left University I was able to do my own accounts as I have set up a business selling portraits. The ICT skills that I learned in Administration and IT are invaluable.'

'By studying Administration and IT I feel that it really helped me when it came to report writing and doing homework in other subjects.'

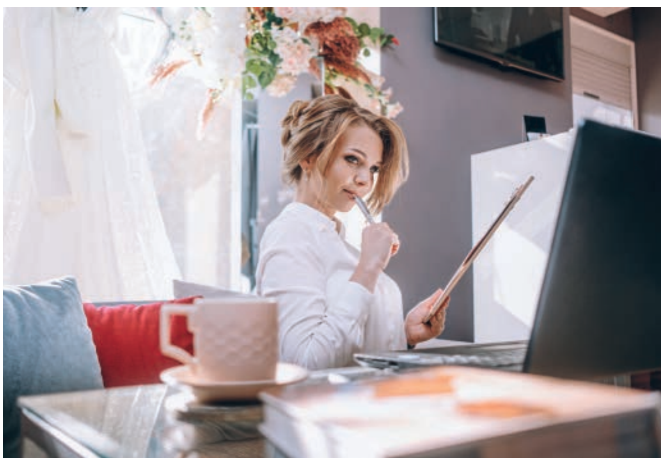
'I left school passing Higher Administration and IT. I am now a manager for a multinational insurance company – the skills I learned by doing Higher Administration and IT are having good time management skills and looking to train staff to the best of my ability so that I can retain the staff and good IT skills.'

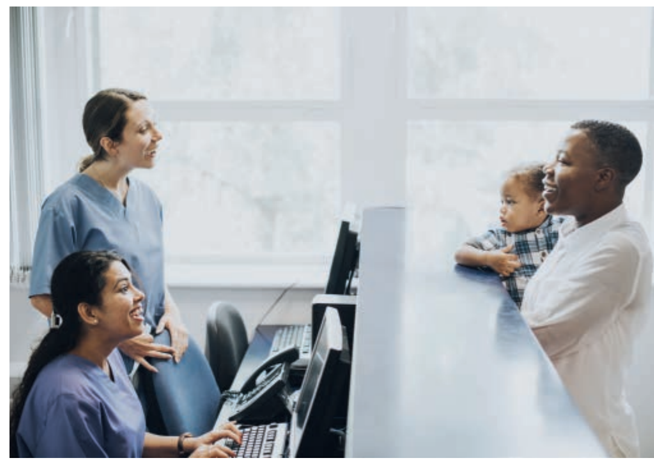
'I am a nurse. Apart from Human Biology the one subject I am still using in my day-to-day job is the ICT skills that I picked up from Administration and IT. I have to record patients' results in a spreadsheet and at times have to sort through records using database skills that I learned in Administration and IT.'

What jobs can you get after studying Higher Administration and IT?

Below are examples of jobs where you would use Higher Administration and IT skills:

- PR manager
- Corporate finance
- Investment banking
- Event planner
- Stockbroker
- Nurse
- Wedding planner
- Police officer
- Fire officer
- Office manager
- Administrative assistant
- Marketing executive
- HR manager
- Accountant





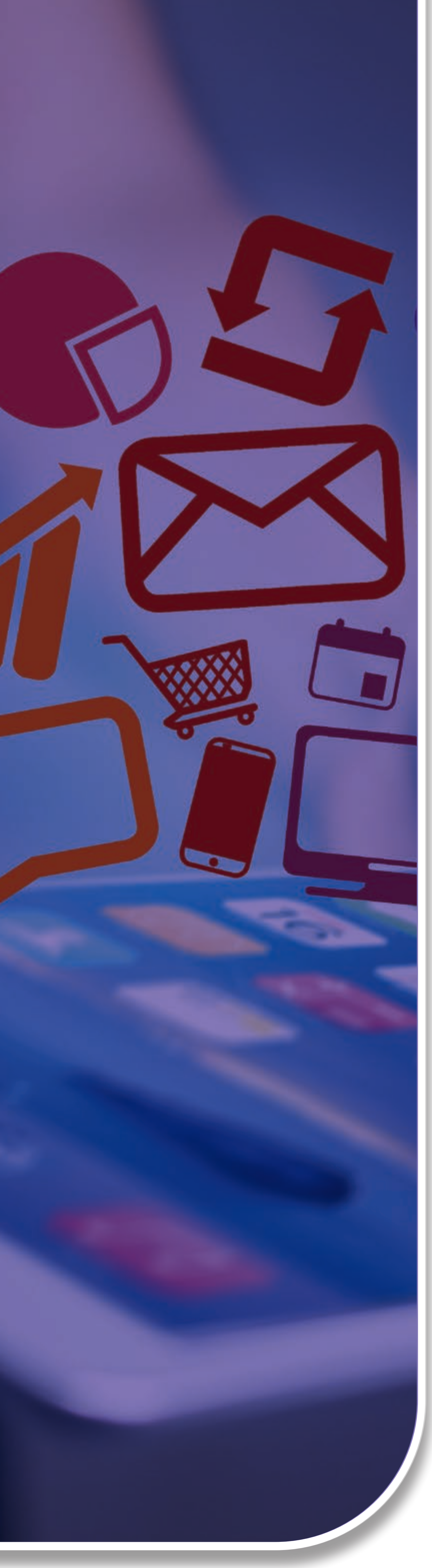
Impacts

In the theory element of Higher Administration and IT, it is important that you know a bank of impacts to help answer the questions.

An example of an impact is that if you get trained in health and safety then there should be a reduction in accidents. The reduction in accidents is an **impact**.

Here are some examples of impacts:

- increase/decrease in positive/negative reviews
- increase/decrease in positive/negative reputation
- increase/decrease in customers
- increase/decrease in profits
- increase/decrease in sales
- increase/decrease in sales revenue
- increase/decrease in customer loyalty
- increase/decrease in waste
- increase/decrease in customer satisfaction
- increase/decrease in mistakes
- increase/decrease in accidents in the workplace
- increase/decrease in staff morale
- increase/decrease in staff turnover
- increase/decrease in customer footfall
- increase/decrease in highly skilled employees
- increase/decrease in costs/expenses
- increase/decrease in absenteeism.



Command words

The following are examples of command words that students might encounter in exam questions.

Identify

Name something – all you need is one word. One identification = 1 mark.

EXAMPLE

- Question: **Identify** three time stealers.
- Answer: Distractions, inability to say no, unnecessary phone calls.

Outline

Give a brief statement – a short sentence. One outline = 1 mark.

EXAMPLE

- Question: **Outline** one barrier to communication.
- Answer: Background noise such as the radio can be a barrier to communication.

Describe

Give a description and use examples where possible within the description. Try to get 'this means' into your answer. One description = 1 mark.

EXAMPLE

- Question: **Describe** strategies to improve the effectiveness of time and task management.
- Answer: Each job can be given a priority. This means that each job can be presented in a list which highlights the most important tasks first and makes them more manageable.

Compare

You must be able to compare the similarities and differences between the items. If you are answering the question like a similarity, start with the word 'both'. If you are answering the questions like a difference, then use the word 'whereas' in the middle of your answer. One comparison = 1 mark.

EXAMPLE

- Question: **Compare** the role of an Administrative Assistant and Chairperson.
- Possible answers:
  - They both meet before the meeting to discuss the agenda together. (1 mark)
  - An Administrative Assistant types up the agenda whereas the Chairperson signs off the agenda. (1 mark)

Distinguish

You must be able to give a difference between two items and use the word 'whereas'. One difference = 1 mark.

EXAMPLE

- Question: **Distinguish** between formal and informal meetings.
- Answer: A formal meeting will have minutes recorded for all attendees, whereas an informal meeting may have no minutes.

Discuss

Give advantages and disadvantages where possible. Use examples if you can in your answer and make a conclusion if possible. One discussion point = 1 mark.

EXAMPLE

- Question: **Discuss** the impact of poor communication between an Administrative Assistant and their manager.
- Answer: Employees may wrongly inform customers which leads to the organisation receiving a bad reputation.

Explain

Give a definition and then give an impact. If the question is asking for an advantage, give a definition and say, 'this is good because' and then give an impact. If the question asks for a disadvantage, say, 'this is bad because' and then give an impact. One explanation (must be impact) = 1 mark.

EXAMPLE

- Question: **Explain** one benefit of good time and task management.
- Answer: Good time and task management will lead to good working relationships. This is good because morale will be high which will increase productivity.

Implications/Consequences

Implication: You should state what the likely outcome will be of a particular action, either on a person or the organisation. One outcome = 1 mark.

Consequence: You must be able to identify the initial impact of the action being followed. One consequence = 1 mark.

EXAMPLE

- Question: Describe a **consequence** and the **implication** to an organisation of inadequate planning for a meeting.
- Answer: The venue may be double booked, meaning that the meeting may need to be postponed and attendees may be greatly inconvenienced.

Justify

You must be able to give reasons why a certain course of action is being taken (an advantage).

EXAMPLE

- Question: **Justify** the need for an employee to receive training in using the organisation's IT systems.
- Answer: Employees will feel more confident if trained in the use of IT systems and therefore will have a higher morale at work, which will increase productivity.

Unit 1

Administrative Theory and Practice

Chapter 1 The role of an Administrative Assistant and meetings

1.1 The role of an Administrative Assistant

Figure 1.1

An Administrative Assistant provides different kinds of administrative support for the organisation. This is a vital role in keeping the organisation working effectively on a daily basis. An Administrative Assistant will be involved in the planning and organising of events, such as business meetings and conferences. As such they will be expected to multitask and undertake a broad range of duties.

The two documents used in the recruitment process are the Job description and the Person specification.

A **Job description** is a document which outlines what a vacant position will entail. It will include information such as:

- the job title
- description of the duties of the job
- the main purpose of the job
- the department the job belongs to
- who the job reports to
- the duties associated with the job (for example, providing administrative support by writing emails and answering calls from customers)

- working conditions (such as job location, starting and finishing time and training)
- salary
- holiday entitlement.

A **Person specification** is a document which outlines the requirements of the applicants for them to be considered for the job. It will include requirements such as:

- skills
- experience
- qualifications.

These categories are grouped into 'essential' characteristics, which means that the applicant must have this requirement, and 'desirable' characteristics, which means that it would be an advantage if you have this requirement.

Below is an example of a Job description and a Person specification for an Administrative Assistant.

Position	Administrative Assistant
Reports to	Senior Administrator
Salary	£15,000 per year
Holiday entitlement	25 days per year
Key responsibilities	• Maintaining and updating databases. The ideal candidate must be able to search and sort databases and produce forms and reports. • Answering the telephone and transferring calls to appropriate members of staff. • Receiving and passing on messages when the member of staff is not available. • Delivering excellent customer service to give a good impression of the organisation. • Making appointments in the electronic diary for meetings and events. • Ensuring all tasks are completed on time. • Undertaking word processing tasks, e.g. letters to customers, preparing reports for management, preparing agenda and minutes. • Sending and receiving emails to/from customers/suppliers/employees. • Using office equipment to support colleagues, e.g. photocopying booklets. • Undertaking reception duties, e.g. dealing with and directing visitors, ensuring the visitors' book is signed and badges issued.

Table 1.1 Job description of an Administrative Assistant

	Essential	Desirable
Education/employment history	• N5 English • N5 Administration and IT • N5 Mathematics • HNC Administration or other business-related subject	• One year's experience working in an office environment. • Over one year's experience working in customer service.
Skills and qualities	• Good time keeping and attendance record. • A good working knowledge of IT software to complete tasks, e.g. word processing, PowerPoint, Excel spreadsheets. • Good communication skills to create a good impression with customers. • Good file management skills to ensure that documents are stored securely and able to be found when needed. • Able to work independently or as part of a team to ensure tasks are completed effectively. • Motivated, keen to learn and willing to keep up with technological changes.	• Be able to work calmly under pressure. • Be able to touch type.

Table 1.2 Person specification of an Administrative Assistant

Duties	Skills	Qualities
• File information. • Update schedules. • Organise business travel. • Schedule meetings and events. • Operate the telephone system. • Reply to generic emails and enquiries. • Maintain office equipment. • Deal with requests for information. • Prepare documents such as letters, agendas and memos.	• Communication • Organisation • Problem solving • Interpersonal • ICT	• Tactful • Team player • Friendly • Approachable • Patient • Confident

Table 1.3 Duties, skills and qualities of an Administrative Assistant

Senior Administrative Assistant

Administrative Assistants and Senior Administrative Assistants (or Office Managers/Coordinators) provide advanced administrative support to an organisation. However, Senior Administrative Assistants generally have greater experience or are more qualified than Administrative Assistants and they are more likely to work closely with management, working on tasks which may require greater sensitivity, confidentiality or skill.

Below are examples of a Job description and a Person specification for a Senior Administrative Assistant.

Figure 1.2

Position	Senior Administrative Assistant
Reports to	Senior Management
Salary	£25,000 per year
Holiday entitlement	30 days per year
Key responsibilities	• Operating a petty cash system. • Ordering office supplies for the whole organisation. • Providing training on administrative systems to the office staff. • Conducting appraisals for the office staff. • Monitoring and controlling **PDP** for staff. • Managing electronic diaries for senior management. • Delegating tasks to office staff. • Supervising junior and apprentice Administrative Assistants. • Preparing reports for management meetings. • Liaising with the Chairperson about the agenda for upcoming meetings.

Table 1.4 Job description of a Senior Administrative Assistant

KEY TERM

PDP – Personal Development Plan.

	Essential	Desirable
Education/employment history	• Higher English • Higher Administration & IT • N5 Mathematics • HND Administration/ Office Studies	• Over five years' experience working in an office environment. • Over five years' experience working in customer service. • Over two years' management experience. • Higher Business Management.
Skills and qualities	• Good time keeping and attendance record. • A good working knowledge of IT software to complete tasks. • Good communication skills to create a good impression with the customer. • Able to work independently or as part of a team to ensure tasks are completed effectively. • Motivated, keen to learn and willing to keep up with technological changes. • Delegation skills. • Leadership skills to offer support to other members of the office.	• Be able to work calmly under pressure. • Be able to touch type.

Table 1.5 Person specification of a Senior Administrative Assistant

Duties	Skills	Qualities
• Maintain and order office supplies. • Manage the electronic diary/ schedule for management. • Supervise Junior Administrative Assistants. • Prepare reports and presentations for management. • Train Administrative Assistants. • Arrange the work rota of Administrative Assistants. • Delegate work to Administrative Assistants.	• Reliable • Adaptable • Communication • IT • Problem solving • Leadership • Assertive • Planning	• Optimistic • Calm • Flexible • Honest • Model good behaviour • Empathetic

Table 1.6 Duties, skills and qualities of a Senior Administrative Assistant

TOP TIP

There are Administrative Assistants in the office and they have managers who are classed as Senior Administrative Assistants. The Senior Administrative Assistant will take on a management type role in the office as they are responsible for junior administrative staff.

Junior Administrative Assistant	Senior Administrative Assistant
• Prepares key business documents such as letters. • Deals with requests for information. • Conducts reprographic duties such as photocopying. • Operates the telephone system/switchboard. • Conducts reception duties. • Organises business travel and accommodation requests. • Undertakes filing either electronically or digitally. • Creates and updates spreadsheets and databases for use.	• Operates and controls the petty cash system and pays employee expenses. • Maintains and orders office supplies/equipment. • Manages the electronic diary/schedule of the senior management team. • Supervises the Junior Administrative Assistants. • Prepares presentations and reports for the senior management team. • Delegates and evaluates the work of the Administrative Assistants.

Table 1.7 Differences between a Junior Administrative Assistant and a Senior Administrative Assistant

1.2 Types of meetings

A meeting is a gathering together of people for a specific purpose. In today's world, we are very heavily dependent on ICT to conduct a meeting. Technology is used, such as the internet, webcams, smartphones and tablets so that people within an organisation can communicate and effectively hold a meeting in an office or remotely.

The main purposes of meetings are:

- to plan for the future
- to make and agree on decisions
- to set targets and objectives
- to motivate staff and encourage team building
- to consult on issues and solve problems
- to discuss and generate ideas
- to share good practice and concerns.

There are two types of meetings:

- **Informal**: these are often held in business. These meetings can range from chats during tea breaks to regular sales team meetings. There are no procedures or rules to follow.
- **Formal**: these are held for a specific purpose and at regular intervals: for example, the Annual General Meeting (AGM). These meetings have to follow rules and procedures.

Figure 1.3 Informal meetings have no set procedures to follow

Figure 1.4 Formal meetings have set rules and procedures

1.3 Roles and responsibilities

The main positions of responsibility for formal meetings are as follows:

- Chairperson: responsible for keeping order and taking charge at the meeting
- Secretary: provides administrative support
- Treasurer: prepares financial reports.

Before	During	After
• Compiles the agenda for the meeting. • Ensures the meeting is set up according to the **Standing Orders/ Articles of Association**. • Ensures the Secretary has notified all attendees of the meeting. • Checks that the meeting venue meets the requirements of the meeting and raises any issues with the Secretary.	• Ensures there is a **quorum**. • Starts and ends the meeting on time. • Keeps control of the meeting. • Makes sure everyone has a chance to speak. • Explains complex issues. • Decides when it is time to vote. • Declares and records the results of the vote. • Makes decisions. • Closes or adjourns the meeting.	• Liaises with the Secretary regarding the preparation of the draft minutes and agenda for the next meeting. • Takes follow-up actions resulting from the items discussed. • Makes any necessary decisions between meetings, usually in consultation with the Secretary.

Table 1.8 Duties of Chairperson before, during and after meetings

KEY TERMS

Quorum – The minimum amount of people to be in attendance at a meeting to make the meeting valid.

Standing Orders/Articles of Association – The formal written rules of how meetings should be organised and conducted within organisations.

Before	During	After
• Books the venue. • Makes sure the room is laid out appropriately. • Organises refreshments. • Books any equipment needed. • Informs reception where the meeting is taking place. • Makes a note in appropriate diaries – Chairperson. • Makes extra copies of the agenda and minutes of the previous meeting. • Makes a note of any apologies received. • Prepares name badges for attendees. • Informs reception of the meeting and where it is being held. • Checks the room is as expected. • Checks equipment is working. • Makes sure there are signs directing attendees to the meeting room. • Places a 'Meeting in progress' sign on the door. • Prepares an attendance register.	• Passes any papers to the Chairperson. • Reads the minutes of the previous meeting and reports any apologies received. • Makes sure the Chairperson signs the minutes of the previous meeting. • Makes sure everyone signs the attendance register. • Takes notes for the minutes of the meeting. • Makes a separate note for actions by the Chairperson. • Distributes expense claim forms.	• Tidies the room and collects all unused papers. • Drafts the minutes and gives a copy to the Chairperson. • Makes a note in the diary of when the agenda for the next meeting should be sent out. • Follows up any actions arising from the meeting. • Writes any letters as required from the meeting. • Makes a note of the date of the next meeting. • Prepares the agenda and Chairperson's agenda for the next meeting.

Table 1.9 Duties of a Secretary/Administrative Assistant before, during and after meetings

The Chairperson will decide on the agenda items	whereas	the Administrative Assistant will create the agenda and send it to attendees. (One mark)
The Chairperson will inform the Administrative Assistant of the requirements for a venue	whereas	the Administrative Assistant will research and book the venue. (Second mark)
The Chairperson will decide/request specific equipment or requirements for the meeting	whereas	the Administrative Assistant will ensure the equipment is booked. (Third mark)
The Chairperson will decide on attendees	whereas	the Administrative Assistant will invite attendees/ send Notice of Meeting. (Fourth mark)
The Chairperson will work through the agenda items in order during the meeting	whereas	the Administrative Assistant will take the minutes. (Fifth mark)
The Chairperson will check the accuracy of the minutes before they are distributed	whereas	the Administrative Assistant will type up the minutes. (Sixth mark)

Table 1.10 Differences between the duties of a Chairperson and an Administrative Assistant in relation to meetings

1.4 Consequences of inadequate meetings

If meetings are not properly planned, the consequences could be as follows:

- The meeting may be postponed.
- A badly designed agenda may lead to confusion and time being wasted.
- If attendees have not received the agenda on time, they may not be fully prepared for the meeting.
- An attendee may feel embarrassed if dietary requirements have not been met: for example, vegetarian and vegan options.
- If reception is not informed of the meeting, attendees may be misdirected.
- If parking has not been arranged, for example, disabled access, this could lead to lateness and stress and the meeting not starting on time.

1.5 Documentation in meetings

There are two documents that are used in a meeting that you need to be aware of in Higher Administration and IT:

- Agenda
- Minutes.

Agenda

This document is usually sent to attendees some time before the meeting to give them an opportunity to prepare for the meeting.

NOTICE OF MEETING
A meeting of the Board of Directors will be held in the Board Room on 14 February 2022 at 0900 hours.

AGENDA

1. Apologies for Absence
2. Minutes of Previous Meeting
3. Matters Arising
4. Staffing Review
5. Financial Performance
6. Operational Issues
7. Marketing Strategy
8. Administrative Update
9. Any Other Business
10. Date of Next Meeting

Wendy Gibson

Secretary

Figure 1.5 Example of a meeting agenda

An agenda is important for the following reasons:

- It is a legal requirement if the organisation is a **Public Limited Company (plc)**.
- It gives attendees the information they require to decide whether they need to attend.
- It gives attendees time to prepare their thoughts, research information and prepare the resources required.
- It will alert attendees to the possibility of a vote.
- It will enable attendees to gauge how long the meeting will take.
- It gives attendees the opportunity to alert the Chairperson to any additional items to be added.

Minutes

Minutes are the official record of the meeting and are usually taken by the Secretary. A record is also made of **proposers**' and **seconders**' **motions**, any decisions that are made and any actions that need to be taken. The minutes are usually recorded in the same order as the items appear on the agenda.

KEY TERMS

Public Limited Company (plc) – Type of organisation owned by shareholders that sells its shares openly on the stock market.

Proposers of motions – A member in the meeting who puts forward an idea.

Seconders of motions – A member in the meeting who formally supports the idea put forward.

MINUTES OF MEETING

Minutes of the Board of Directors meeting held in the Board Room on
14 February 2022 at 0900 hours.

PRESENT
Steph Wood (Chairperson)
Wendy Gibson (Secretary)
Lee Alderdice
Anna Kowalska
Mohammad Akhtar

1. APOLOGIES FOR ABSENCE

Apologies were received from Lorna Ward and Craig Wood who are both currently ill.

2. MINUTES OF THE PREVIOUS MEETING

The minutes of the previous meeting were taken as read, agreed and signed by the Chairperson.

3. MATTERS ARISING

Wendy Gibson queried the level of absences from the Kirkcaldy branch.

4. STAFFING REVIEW

Mohammad Akhtar has asked that all branch managers submit their staffing return by tomorrow at 1200 hours.

5. FINANCIAL PERFORMANCE

Anna Kowalska circulated the targets for each branch in terms of sales revenue.

6. OPERATIONAL ISSUES

Anna Kowalska has asked all staff to complete their GDPR training by 1 March 2022.

7. MARKETING STRATEGY

Wendy Gibson is taking the lead for this initiative and will update the presentation as soon as possible.

8. ADMINISTRATIVE UPDATE

There were no updates to report, with the exception of the GDPR training update.

9. ANY OTHER BUSINESS

There was no other business discussed.

10. DATE OF NEXT MEETING

The next meeting will be held on 21 February 2022 at 0900 hours in the Board Room.

Chairperson: ______________________________

Date: ______________________________

Figure 1.6 Example of meeting minutes

1.6 ICT in meetings

In today's business world, most meetings are done remotely, which means that we need technology to have meetings.

Figure 1.7

Technology used in meetings

The types of technology used in meetings include:

- **Email**: Documents for meetings can be sent electronically so that employees can view documents before they attend the meeting. Groups can be set up for regular meetings.
- **Videoconferencing**: This reduces the need to travel to attend meetings. Body language and facial expressions can be seen, which helps with communication. It is also possible for presentations of products to be shown, which means better decision making. Meetings can be recorded and reviewed at a later date.
- **Audio conferencing**: This means that a number of people can speak to each other at the same time. This is useful if a face-to-face meeting is not needed.
- **Videophones**: These allow a number of people to hold a meeting without the need to be in the same place.
- **Networks**: User groups can be set up and password protected to allow information to be shared.
- **Collaborative whiteboarding**: This allows people at different locations to use the same computer program simultaneously over a network. Text can be highlighted, for example, and it is often used with videoconferencing.
- **Online application sharing**: Known as groupware, this allows participants to access diaries, calendars and shared documents. People can collaborate on documents without having to meet.
- **Electronic diaries**: Dates and times can be selected when all participants are free. Details of a meeting can be entered into all participants' diaries. Meeting attendees can accept or decline immediately. Other diaries can be checked before a date and time is chosen in order to ensure that most people can attend before a notification request is sent. Finally, you can use the notes section to give more detail and reminders/alarms to action tasks or to countdown to a meeting.
- **Collaborative platforms (TEAMS)**: Collaborative platforms, such as Microsoft Teams, allow users to share and collaborate on documents while allowing instant communication between individuals either verbally or through videoconferencing. This means that employees can now communicate from any location with a connected device.

Benefits of technology in meetings

The benefits of using technology in meetings include:

- Attendees can communicate with other individuals across vast geographical distances without the need for travel.
- A financial saving can be made as the expense of travel and accommodation is no longer required.
- Meetings can be planned and held in a shorter time frame than would be possible with more traditional meetings.
- Meetings can be recorded and saved to refer back to at a later date and to act as a permanent record of what was discussed.
- Collaborative platforms now allow employees to share ideas, problems and solutions more efficiently across the organisation.
- Demonstrations and key information can be displayed in a variety of different media, better informing the attendees ahead of the decision-making process.

Consequences of technology in meetings

The consequences of using technology in meetings include:

- The effectiveness of the meeting depends on the quality of the technology. If there are connectivity issues or technical problems, the meeting cannot go ahead and this will affect productivity.
- There are security risks and implications as hackers and unauthorised personnel may be able to gain access to the information being discussed or the documents being used.
- Technology can be financially expensive to purchase, install and maintain.
- Many staff dislike the lack of human contact and feel that the remote meetings are impersonal, which could reduce their motivation and morale.
- It can be difficult to gauge body language and verbal cues when not in the room with someone and this may mean that information is not passed on effectively.
- As attendees are no longer travelling geographical distances, it can be difficult to schedule a meeting which takes account of different time zones.

WHAT YOU NEED TO KNOW

1	Skills and qualities of an Administrative Assistant and a Senior Administrative Assistant.	✓
2	The difference between a Job description and a Person specification.	✓
3	The role of an Administrative Assistant and a Chairperson when planning a meeting.	✓
4	The tasks to be completed before, during and after a meeting/event.	✓
5	The documents used in a meeting.	✓
6	The ICT used in a meeting.	✓

STUDY ACTIVITIES FOR THIS OUTCOME

- Create a blank Person specification and Job description and then fill it in for a job that you want to do when you are older. Use completed job descriptions and person specifications to help you.
- Think about the role that the Administrative Assistants play in your school office. Describe what their role is and what skills you think they have. This will help you relate the content of this Outcome into practice and help you remember more.
- Imagine you are an Administrative Assistant and it is your job to arrange a meeting. Think about what you would be expected to do before, during and after a meeting and why.
- Move on to if you were in charge of the meeting. What would you be expected to do during and after the meeting?
- Finally, imagine you are responsible for organising a meeting that involved people from all over the world. It is your responsibility to arrange the technology. What technology would you use and why?

CASE STUDY

Niall Logan is a Senior Administrator and has been working for Ceres Entertainments, which is based in Pitlochry. The organisation arranges music festivals around Britain.

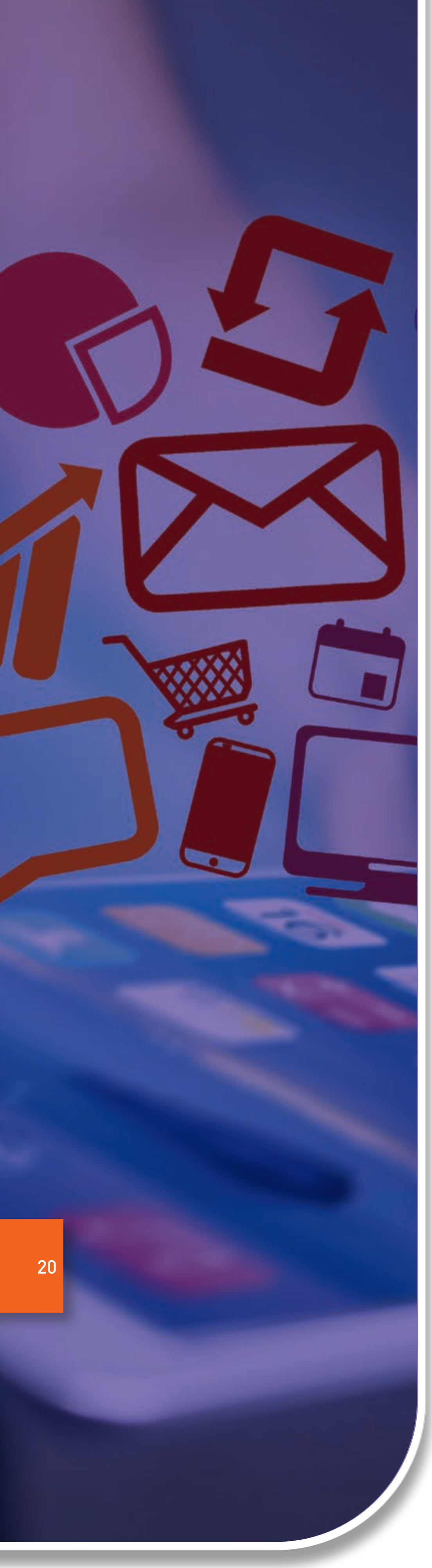
It is Niall's job to sit in on senior management meetings and action what is said and agreed in a meeting. Niall has a very busy job so he must **delegate** many tasks to other administrators so that the music festivals that are held throughout Britain are a great success.

His usual day starts about 8.45 am. It may be earlier if he needs to get a particular piece of work done. The first thing he will do is check emails to see if anyone needs a job done straightaway or whether he has heard back from an artist who is willing to play at an upcoming music event. At 10.30 am and 2.30 pm, he checks in on the apprentices. He may manage a scheduled appraisal. The rest of the day is spent helping senior management with whatever project work needs to be completed. Every Friday, he will provide the administrative support for senior management. This is a big job as some of the directors work remotely, so he will have to arrange a time that suits them by checking their electronic diaries and scheduling appointments (making sure that he does not double book). With so many of management working remotely, it is Niall's responsibility to arrange the software so that the meeting can take place smoothly. This involves making sure management have access to their smartphones or tablets, sending out an invite to the meeting so that management can join the remote platform and emailing the agenda for the meeting. Once this is done, Niall must take minutes of the meeting and then type these up and consult the chairperson.

Q1	One of Niall's roles is to provide administrative support in a meeting. **Outline** the tasks that he would have to do in a meeting. (4)	Building
Q2	Niall has to use different ICT for meetings to happen each week. **Describe** the different methods of ICT that could be used in a meeting. (4)	Building
Q3	Niall is responsible for training junior Administrative Assistants. **Describe** other roles that Niall is responsible for in his job. (3)	*Strengthening*
Q4	**Distinguish** between the role of an Administrative Assistant and a Senior Administrative Assistant. (4)	*Strengthening*
Q5	**Justify** the need for an agenda before a meeting. (3)	*Strengthening*
Q6	One of Niall's jobs is to arrange a meeting. **Explain** the consequences of inadequate meetings. (4)	**Extending**
Q7	**Discuss** the advantages of a Senior Administrative Assistant using an electronic diary. (4)	**Extending**
Q8	**Explain** the advantages of remote meetings. (3)	**Extending**

KEY TERM

Delegate – Give employees the authority to carry out tasks.



Chapter 2 Time and task management

Figure 2.1

One of the most important skills for effective working is that of time management. By using your time effectively you will be more productive in getting the task in hand done. Time is a resource that is easy to waste – whether it is spending 10 minutes looking for a document you did not make the effort to store correctly or talking to colleagues/friends rather than doing the task in hand.

Good time-management techniques should ensure that:

- the best use is made of the time available
- time-wasting activities are minimised
- more time is made available for important or urgent jobs.

2.1 Causes of poor time and task management

In order to overcome the causes of poor time and task management, it is a useful exercise to identify the time stealers (also known as time wasters) that can affect the workflow. Table 2.1 identifies the most common time stealers and suggests ways in which they can be tackled to improve time and task management.

Lack of self-discipline or shuffling papers	Use your Priorities list and Action plan. Do not procrastinate (put off) tasks that you do not particularly like doing. Tackle one or two uninteresting tasks per day – do not allow them to pile up. Reward yourself for completing these tasks. Practise handling papers only once, i.e. do not keep picking up and putting down papers – deal with them as they arrive whenever possible.
Darting about from one task to another	Prioritise all work and stick to the list (unless emergency situations arise). Finish a task before moving on to the next task on your list.
Delegate	If you have staff in a more junior position to yourself, learn to delegate. Accept that others can do tasks as well as you can.
Meeting overrunning	Ensure that meetings have a time limit – maybe use alarms so that people know how much time they have to talk.
Making unnecessary journeys	Group tasks so that visits to other departments, the photocopier, the mailroom, etc. are cut down to one or two trips per day.
Searching for lost papers	File, file, file! Set up and maintain filing systems that are backed up with cross-referencing.
Lack of forward planning	Make use of planning aids such as Priorities lists and Action plans.
Interruption from the telephone	Learn to control the conversation. Do not allow conversations to run on for too long. If it becomes apparent that there is a lot to be discussed, suggest a meeting at a more appropriate time. Schedule a time of the day to make calls.
Unexpected visits from colleagues	Learn to control the conversation, be assertive and explain that you are busy and maybe arrange for a time to meet.
Taking on too much work	Learn to say No. Be assertive. If your work is piling up, you must approach your line manager and ask for help or for a halt to new work and tasks being allocated until your desk is clear.

Table 2.1 Causes of poor time and task management

2.2 Effective time and task management

The skills for effective time management are shown in Table 2.2.

Organisation	Looking ahead and planning, but also monitoring progress and achievement. Making sure that all employees have a valuable task to perform.
Prioritising	Identifying urgent tasks and highlighting those tasks that can be delegated.
Delegation	Deciding when it would be appropriate to ask someone else to do some of the tasks – the person being asked to do the task must have the relevant knowledge and skills. Delegating means the manager can focus on key tasks so deadlines can be met. It can also motivate junior staff.
Resource management	Making effective use of time, staff and equipment.
Controlling	Controlling resources and being able to create and work in a calm and relaxed environment.
Planning	Looking ahead and identifying potential opportunities and threats by setting targets and strategies for future projects.
Directing	Directing clearly to avoid time wasting through lack of understanding. Setting the standards required to undertake duties effectively and efficiently. Instructing colleagues how to undertake duties.

Table 2.2 Skills for effective time management

2.3 Impact of time and task management

The benefits of good time and task management to the employee and the organisation are shown in Table 2.3.

Benefits of good time and task management to the employee	Benefits of good time and task management to the organisation
• Tasks are completed to a high standard and on time, which will lead to higher self-esteem. • Employees will feel less stressed in the workplace, therefore making them more productive. • As employees feel less stressed, their job satisfaction increases which will improve morale and motivation. • There are better working relationships between employees and management as there is no tension between workload and quality. • Generally, employees who are working to a high standard are more likely to achieve a promotion, increasing salary and status.	• Work is completed on time and to a high standard, increasing the productivity of the organisation. • As employees are less stressed at work, they are less likely to be absent. • Staff who are more motivated with high levels of job satisfaction are less likely to leave the organisation. • Improved employee relations encourage a positive and welcoming atmosphere, which will improve the reputation of the business. • The efficiency and the effectiveness of the organisation will allow for improvements in customer service, leading to increased profits.
Consequences of poor time and task management to the employee	**Consequences of poor time and task management to the organisation**
• Tasks are completed to a poor standard and late, which will lead to a sense of underperformance and inadequacy. • Employees will feel highly stressed in the workplace, therefore decreasing their productivity further. • As employees feel more stressed, their job satisfaction decreases which will lower morale and motivation. • Tension between workload and quality of effort might result in poor working relationships between employees and management. • Generally speaking, employees who are underperforming are more likely to receive disciplinary sanctions, such as warnings.	• Work is often incomplete or not submitted on time which leads to a reduction in productivity. • As employees are more stressed at work, absence increases which leads to greater workload. • Staff who are unmotivated with low job satisfaction are more likely to leave the organisation. • Poor employee relations encourage a bad atmosphere, which will damage the reputation of the business. • The inefficiency and the ineffectiveness of the organisation will lead to poor customer service, resulting in decreasing profits.

Table 2.3 The benefits of good time and task management to the employee and the organisation

2.4 Individual and organisational targets

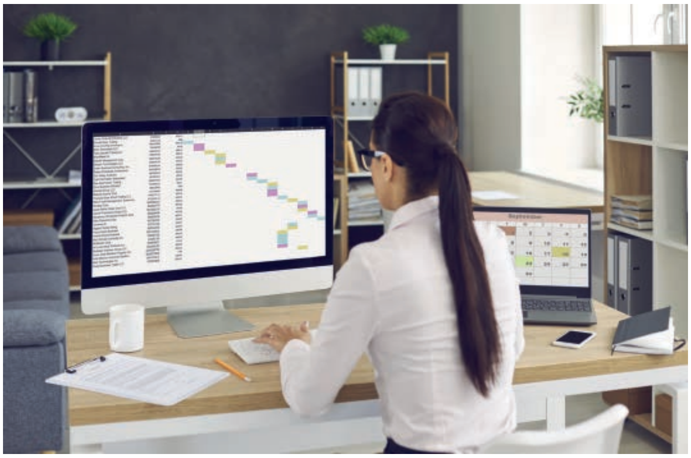


Figure 2.2

It is important within any organisation that employees share the management's vision. It is the role of the Senior Administrative Assistant to set both personal and departmental targets to enable the organisation to meet its long-term goals.

These targets will be based on a number of factors and can be recorded in a variety of different ways, as shown in Table 2.4.

Method	Description
Gantt chart	• This is a chart that a manager could put up to allow individuals to see at a glance key dates and the tasks that have to be completed. • It can also be used to monitor when tasks have been completed. • A Gantt chart is used to plot actions on a timeline and can help to ensure that employees are working towards achieving a deadline or that they will complete certain tasks within a specified time. • It allows identification of busy times/quieter times. It will also help to show where tasks or activities may conflict with each other, or show at which times workload may increase or decrease. This will allow an employee to see where they can take on other tasks or projects and where they may struggle with their workload. • This also contributes to good time and task management as it can help to ensure that employees are not overloaded with work at specific times and that work can be delegated effectively to employees who have sufficient time to complete it.
To-do list	• A to-do list is a list of the tasks and activities that need to be completed over a set period of time. • This is a document that an individual could use on a day-to-day basis to remind them of the tasks that need to be completed. • When completed, the task is ticked off.
Priorities list	• The same list of tasks but this time written out in an order showing which task needs to be tackled first. • It should contain a mixture of high, low and medium priorities. • To-do lists are a great way to be organised. However, quite often individuals complete the most straightforward and unimportant tasks first as they are the easiest, when there are more important or critical tasks that need to be completed first. • To overcome this, a Priorities list could be created. Similar to a to-do list, the tasks on these lists are ranked in order of priority so that the most urgent tasks are undertaken first. Therefore, it is extremely important that employees are aware of how to prioritise their workload.
Action plan	• This is a document that could be prepared to help plan a long-term project, e.g. an Annual General Meeting (AGM). • It shows the tasks that need to be completed, an estimate of how long the tasks should take and any notes to explain actions.
Electronic diary (e-diary)	• Useful for arranging meetings as days, weeks and months can be seen at one glance. • The e-diaries of all participants can be seen at the same time. Most e-diaries have electronic task lists. • They also have reminder systems to flag up due dates. • They allow regular meetings or appointments to be entered into the diary in one entry when the recurring entries feature is used. • Reminders can be set to alert the diary owner that a task or appointment is due. • Other staff members' diaries can be checked online to schedule meetings or reminders. • Entries can be searched for specific information or dates. • Files can be attached to e-diary entries. • Double bookings can be flagged up to avoid meetings or activities being booked at the same time. • An address book facility is included to allow ease of contact with other staff members.
Personal Development Plan (PDP)	• A PDP is a document which can be used to record areas of strength and areas of weakness for future development. • Targets for improving specific areas can be recorded on the PDP along with the methods that may be used to support development and improvement and a target timescale for this. • Employees can identify areas where they feel they have particular strengths and areas where they would like to further develop their knowledge and skills. • A PDP can be completed by an employee with their line manager or supervisor. This encourages positive discussion and feedback on an employee's performance and future targets. An employee may feel motivated by discussing areas of strength and by planning future training and development with their manager.

Table 2.4 Recording personal and departmental targets

2.5 SMART targets

Targets can appear in many different documents such as Action plans or Priorities lists, diaries or PDPs, and in many different forms. Whether targets are complex or simple, short term or long term, for an individual or for the organisation, they should all have certain characteristics – they should be SMART targets.

Specific	The targets must be well defined and **state exactly** what is required or what is to be achieved.
Measurable	What will be the measurement unit to **see whether or not the target has been achieved**? The results must be quantifiable and expressed in some form of measure to check performance.
Agreed	Have you **discussed and agreed** the targets with your line manager? The target must be discussed and agreed between both parties before being implemented.
Realistic	... but challenging. Do you have the **necessary knowledge** and/or skills to complete the target or has an over-ambitious target been set?
Timed	Have you set a **completion date**? It is important that key dates and timescales are agreed at the point of setting targets.

Table 2.5 SMART targets

STUDY TIP

To help your understanding, do a SMART target for yourself. For example, you wish to apply to university:

- **S**pecific – I need to get two A Higher passes to study Business at university.
- **M**easurable – If I get a Band 1 or Band 2 in my exams.
- **A**greed – I have discussed this with my guidance teacher and parents/carers and they will support me.
- **R**ealistic – I am studying four Highers, so I am capable.
- **T**imed – I can achieve this by May for my exam.

2.6 Dealing with changing priorities

Although a Priorities list and Action plan may be completed methodically, plans may still have to be amended because of unforeseen (unexpected) circumstances. There will be certain occasions when urgent action will be required on the Administrative Assistant's part and other work that has been planned for that day will have to be tackled later.

The following are examples of unexpected circumstances:

Staff absence

- Employee calling in sick at short notice.
- A prolonged absence of a colleague for a sustained period of time.
- An employee resigning from their position.
- Difficulties in recruiting new staff.

Technical issues

- Electrical power outage.
- The computer network crashing and preventing users from accessing files.
- Software updates and changes.
- Hardware breaking or not fit for purpose.

Figure 2.3 Software updates can cause unforeseen delays

Organisational changes

- Management changing deadlines.
- The appointment of a new manager/senior leader with different visions/objectives.
- Problems with suppliers or customers.
- Organisational culture affects effectiveness.

2.7 Monitoring and evaluating progress

Where targets are set for employees, a system for controlling and monitoring those targets needs to be in place. Such systems should not be over-complicated and should not be viewed by employees as a way in which they are being spied upon. They should be seen as a constructive aid to help the individual worker achieve targets and receive any necessary assistance.

Targets can be monitored and controlled using various methods, including:

- **Random or sample checks** of work where some, but not all, tasks are looked over by the immediate superior.
- **Line manager checks**, whereby a completed task is also undertaken by the immediate superior in order to pinpoint if there are any problem areas or to ensure results obtained are the same.
- **Buddy systems**, where an employee is paired with a more experienced employee who can be called upon for help and advice.
- **Mentoring systems**, where an employee who is familiar with all the details of the job or organisation acts as mentor. The mentor will be able to offer training, and can give short-term targets and guidance for next steps.
- **Gantt charts**, which show at a glance whether or not projects are on schedule – key milestones are marked on the chart.
- **Audits and system checks**, whereby existing procedures are reviewed and, if necessary, amended in order to bring greater efficiencies or improved work practices.
- **Regular meetings** between staff and line managers.

TOP TIPS

Offices today are very busy places and it is important you are able to think out of the box to make sure you manage your time and tasks effectively. Here are some ideas to help you manage your time and tasks effectively when working in an office.

- Use an electronic diary to set reminders of when tasks need to be completed by.
- Give each task a priority and note how long you spend on each task.
- Try to prioritise tasks into urgent and non-urgent, high, medium and low priority.
- Complete one task before moving on to another.
- Try to avoid interruptions by ensuring telephone calls are dealt with in minimum time and that chatty colleagues are discouraged.
- Have a set time for catching up on calls/emails/ visitors.
- Use a quiet/separate space to ensure that you can focus on the tasks you have to complete without interruptions or distraction.
- Action plans could be used to break the task down into smaller components with timings.
- Use a Gantt chart to indicate the overall timescale of the project and milestones/deadlines that need to be met.

WHAT YOU NEED TO KNOW

1	The skills required.	✓
2	SMART targets.	✓
3	Monitoring targets.	✓
4	Dealing with changes in targets.	✓
5	Time stealers and how to avoid them.	✓
6	Benefits of good time management to employee and organisation.	✓
7	Consequences of bad time and task management to the organisation.	✓

STUDY ACTIVITIES FOR THIS OUTCOME

- Think about when you are revising for your exams/assessments. Get a blank piece of paper and write what the most important things are to help you prepare for your exam/assessment (Priorities list).
- Think about how you feel when you have left your homework to the last moment – how could this be avoided? What are the impacts of not planning your time well?
- Get a large sheet of paper and on one half of the page, write the advantages of having good time and task management skills and then think of the benefits to an organisation. On the other half, write the consequences of poor time and task management.
- You should have a good understanding about how busy an office can be. Create a table with two columns and eight rows. In the first column, write about all the distractions you think there could be in an office. In the matching column (right), write the solutions to these problems.
- Imagine you are in the middle of revising for your prelims/exams. Describe (make your point and say 'This means') the skills you need to have to be able to manage your time and tasks effectively so that you concentrate when studying and give yourself the best chance of success for your exam/prelim the next day.

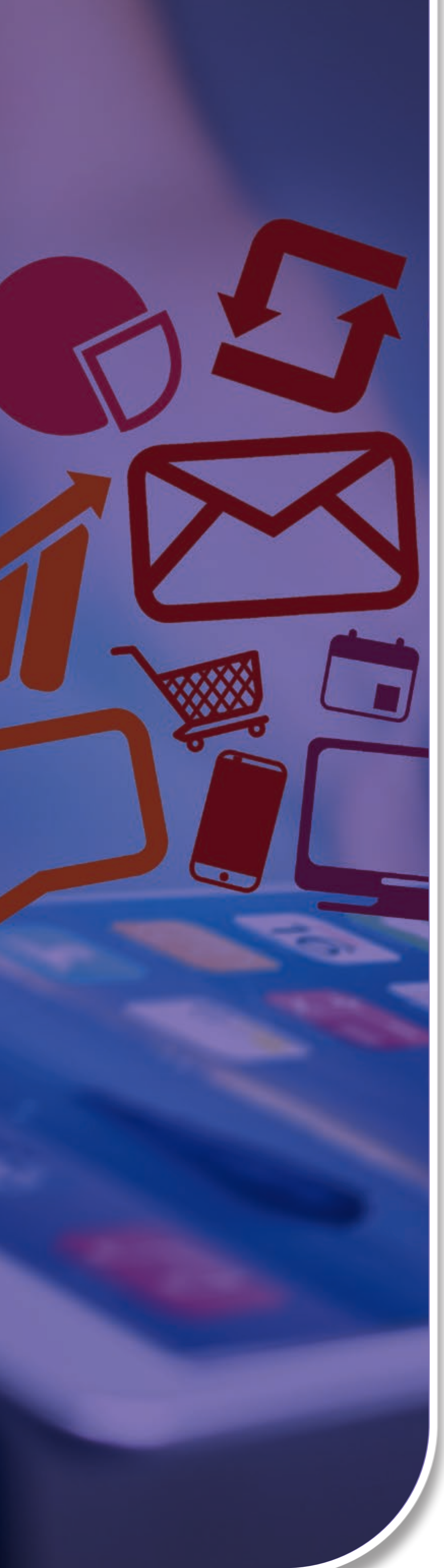
CASE STUDY

Moray Technologies is an organisation offering a wide range of products and services to the electronics market. Due to the demand of their products, they have recently taken on new staff in the office to help deal with the many orders they receive from all over the world. Amal Nagra has recently started as an Administrative Assistant. She has been working for the organisation for four months and is finding the role very challenging.

The company takes orders from all over the world, so Amal finds when Amal gets into work in the morning that she has over 50 unread emails from customers and the phone is always ringing with people asking her to do different tasks. To make matters worse, Amal has to check the company Twitter account and reply to any messages. She really enjoys the job and everyone who works with her is very friendly, but she does find that they will come over and speak to her for up to 15 minutes at a time and she then feels that she falls behind with her work.

Amal has requested a buddy meeting with someone more senior than her where she is hoping to raise some of these concerns. She has heard people in the office talking about SMART targets, so she is going to mention this to her buddy during the meeting.

Q1	**Identify** four of the time stealers that are mentioned in the case study and outline how these can be resolved. (8)	Building
Q2	Amal has a buddy meeting to attend. Besides a buddy system, **describe** other ways that targets can be monitored and controlled. (3)	Building
Q3	Amal has been told to make her targets for her PDP SMART. **Describe** what is meant by a SMART target. (5)	**Extending**
Q4	**Describe** time and task management skills that an Administrative Assistant should have. (4)	**Extending**
Q5	**Explain** the consequences to the organisation that has employees who have poor time and task management skills. (5)	*Strengthening*
Q6	**Explain** the benefits to the employee of good time and task management. (5)	*Strengthening*



Chapter 3 Effective teams

Figure 3.1 Italy's national men's team celebrate victory in the final of the UEFA Euro 2020 football tournament

3.1 Introduction to effective teams

When a business owner puts a team together to **collaborate** and solve a problem, it is important that everyone has a clearly defined role within the team. A football team will put 11 players on the pitch, each with a specific purpose. The same is true for a business team, which needs a combination of skills, qualities and experience so that the team is productive.

> **KEY TERM**
>
> **Collaborate** – Work together.

Definition of a team

A team can be defined as a group that has been specially formed for a particular purpose in order to achieve a particular aim. A team is characterised by three factors:

- a shared purpose or goal
- a sense of belonging to a team (having an identity)
- a dependence and reliance on each other.

When your team members are not sure about their role, they are more likely to try to do what someone else is doing. A team that has a Head of Finance representative should clearly define how that person supports the financial functions of an organisation.

Team attitude

In a team, attitude is infectious. If one or more members of the team has a bad attitude, this ambience can permeate throughout the rest of the team. This will not help the business achieve its goals. Business leaders need to work hard to keep everyone motivated and to identify negative attitudes early on, so that the appropriate individuals can address the problem. This is classed as team conflict.

Ongoing team conflict can lead to:

- poor staff relations, resulting in increased stress and anxiety
- increased wastage of time as disagreements prevent decisions being made
- decreased productivity as more time is dedicated to conflict resolution instead of core activities.

Team formation

It doesn't matter whether teams are created and formed for a short-term project or a long-term initiative, they will all go through the same stages of formation.

Educational psychologist Bruce Tuckman identified a five-stage development process which leads to highly effective and successful teams.

Stage 1: Forming

- This is the stage where team members are selected and introduced to one another.
- It involves a period of orientation and getting acquainted with one another and therefore means that at this point the team is not very efficient.

Stage 2: Storming

- The storming stage is the most difficult and critical stage to pass through.
- It is a period marked by conflict and competition as individual personalities begin to emerge.
- To get through this stage, members must work to overcome obstacles, to accept individual differences and to work through conflicting ideas on team and task goals.

Stage 3: Norming

- Team members are beginning to work together to undertake the task at hand or solve problems.
- Team performance increases during this stage as members learn to co-operate and begin to focus on team goals.
- Routines and behaviours become 'normalised' and part of team dynamics.

Stage 4: Performing

- At this point, there is a clear and stable structure and members are committed to the team's mission.
- Problems and conflicts still emerge, but they are dealt with constructively.
- The team is at its most effective at this point.

Stage 5: Adjourning

- By this stage most, if not all, of the team's goals have been accomplished.
- The emphasis is on wrapping up final tasks and documenting the effort and results.
- Some team members may have been re-employed elsewhere.

TOP TIP

At each stage of team formation, you should always refer to how effective the team is as it moves through the stage.

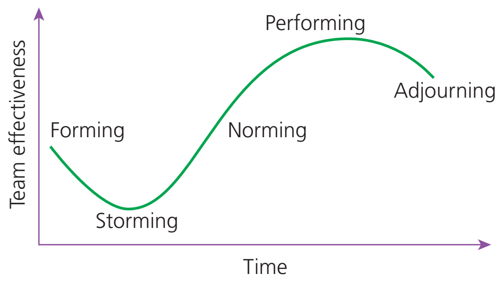


Figure 3.2 Tuckman's stages of team development

3.2 Features of effective teams

For a team to be successful it must have the following attributes:

- **Attitude to risk**: Effective teams must be willing to accept risks and attempt new procedures and activities. Success is best achieved through calculated risk and leaders must ensure they have considered all of the options before making decisions.
- **Team composition**: The team should be made up of individuals with varied skills, qualities and experience. A variety of positive traits will ensure that the team is more likely to achieve their strategic aims.
- **Interdependence**: Team members should rely and be dependent on other team members who possess different skills, qualities and experience. No one individual has all the skills and correct answers and each team member should make a valuable contribution to the success of the team.
- **Time together**: Effective teams should be given ample time to work and develop together. Time should be taken at the start to develop positive relationships in order to be successful through the project.
- **Shared goals**: All team members should share the same common goal and purpose. By believing 100 per cent in the shared purpose of the team, it is more likely that all team members will give their full effort to completion of the tasks. This will reduce team animosity and the likelihood of conflict, while improving efficiencies.
- **Nature of the task**: Every team member should believe in the task to be undertaken and contribute fully to achieving the SMART targets and strategic aims. The more involved each team member feels, the more effective the team is likely to be.
- **Positive environment**: There should be a positive and happy environment within a team in order for it to be successful. Leaders should facilitate an atmosphere of positivity and consistent growth. By doing so, they will allow each member of the team to develop further and enhance their skills and experience.
- **Team size**: There have been many studies into what makes teams effective and researchers have attempted to pinpoint the characteristics of good teams. Meredith Belbin, one of the leading management 'gurus', who has studied team working, identified a number of factors which affected teams.

According to Belbin:

- An effective team will normally consist of around four to six team members.
- If a team is too large, there is a danger of a situation where sub-groups within the team start to form and break away.
- If a team is too small, there is the danger of one person dominating or of there being too few ideas and skills being shared among the group.

Team roles

According to Belbin, those teams that work effectively have members who adopt a number of roles. Belbin identified nine of these roles which the members of an effective team, whatever its size, will clearly fulfil.

The Implementer
This is the person who **turns the idea into actions** and is keen to start tasks.

The Motivator
This is the person who is willing to **overcome obstacles.**

The Finisher
This is the person who keeps an eye on deadlines and ensures **completion of tasks.**

The Specialist
This is the person who has the specialist skills or **expertise** required for success (finance or marketing).

The Ideas Person
This is the person who is **creative**, imaginative and can solve problems.

The Checker
This is the person who **monitors and evaluates** the work.

The Organiser
This is the person who can **forward plan**, co-ordinate, delegate and is decisive.

The Go Getter
This is the person who networks, sources contracts and **accesses resources**.

The Team Player
This is the person who cares for others, minimises conflicts and **listens carefully**.

Figure 3.3 Belbin's nine team roles

Leadership

One of the essential components of effective teams is appropriate leadership. A leader can be described as someone who influences others towards the achievement of goals. Instead of having to coerce followers to achieve a task, a good leader will motivate people to willingly work towards their goals.

Effective leaders achieve this by:

- setting a clear vision or goals for the team
- meeting the needs of the team (for example, information, communication)
- meeting the needs of the individuals within the team (for example, support, training)
- meeting the needs of the task in hand (for example, resources, use of team skills)
- liaising between the team, management and other work areas.

In a business environment, an effective leader will:

- have a clear direction and the ability to make a team more productive so that deadlines are met
- rally the team to increase motivation
- delegate effectively to empower employees
- allocate tasks to suit the strengths and weaknesses of team members, which will lead to greater productivity
- lead by example

- improve communication, which will lead to better decision making
- facilitate effective communication, allowing a dialogue to develop and a better understanding of tasks.

Figure 3.4

3.3 Skills of team members

In order for a team to be successful, the members must have the following skills:

- **Leadership skills:** A leader is someone who influences others towards the achievement of goals. A good leader will be able to motivate the team by setting a clear vision and communicating information to team members. A good leader will provide support to all members of the team and will try to minimise conflict.
- **Listening skills**: Team members should be able to listen to each other's ideas and points of view.
- **Communication skills**: Team members should be able to put their thoughts into words for everyone to understand. Team members should be able to communicate both verbally and in writing.
- **Delegation skills**: Team members should know when to ask someone to do a task. A good team leader will know who to delegate to as they will be aware of that person's knowledge and skills. Individuals in the team will feel more motivated because they feel valued and trusted.

3.4 Benefits of teams to individuals and organisations

STUDY TIP

When asked to 'discuss' the advantages of teams in the workplace, you should refer to the benefits to both the employee and the employer in your response.

The benefits of teams to individuals and organisations are shown in Table 3.1.

Individual	Organisation
Improved morale and motivation: Individuals working in a team will have a greater sense of involvement and this can improve job satisfaction.	**Multi-skilling**: Teams allow the workforce to be more flexible and to adapt to needs as required. For example, when a member of staff is absent, other members of the team can cover their duties between them.
Shared knowledge and skills: Teams can greatly benefit from sharing ideas and knowledge with one another; this can help develop an individual's role within the organisation.	**Responsibility**: Effective teams need less supervision, because they are more likely to take on more responsibility. This could result in layers of management being reduced, which would reduce costs for an organisation.
Risk taking: Individuals working in teams have the ability to share the risk. This encourages them to try out new ideas that they might not have tried as an individual.	**Higher productivity**: The organisation could benefit from increased productivity and lower staff turnover because of the improved morale and motivation of employees.
Sense of being valued and belonging: Individuals working in a team may have an increased feeling of belonging and team identity.	**Risk taking**: Teams are more likely to take risks and this can give an organisation a competitive edge.

Table 3.1 Benefits of teams to individuals and organisations

WHAT YOU NEED TO KNOW

1	The features of effective teams.	✓
2	Team formation.	✓
3	Skills of team members.	✓
4	Benefits of team working to the individual.	✓
5	Benefits of team working to the organisation.	✓

STUDY ACTIVITIES FOR THIS OUTCOME

Think about a time when you have been part of a team:

- What made the team successful and why?
- On another occasion, what made the team less effective and why?
- Who was the leader in the team and what skills and qualities did they possess?
- When thinking about this team, did you do the team formation? If so, how did this happen?
- Also think about what skills you bring in a group situation and what your classmates bring to the group/team.
- What were the benefits to you as a person of being part of a group/team?
- What were the benefits to the teacher/whole class of working in different groups/teams?

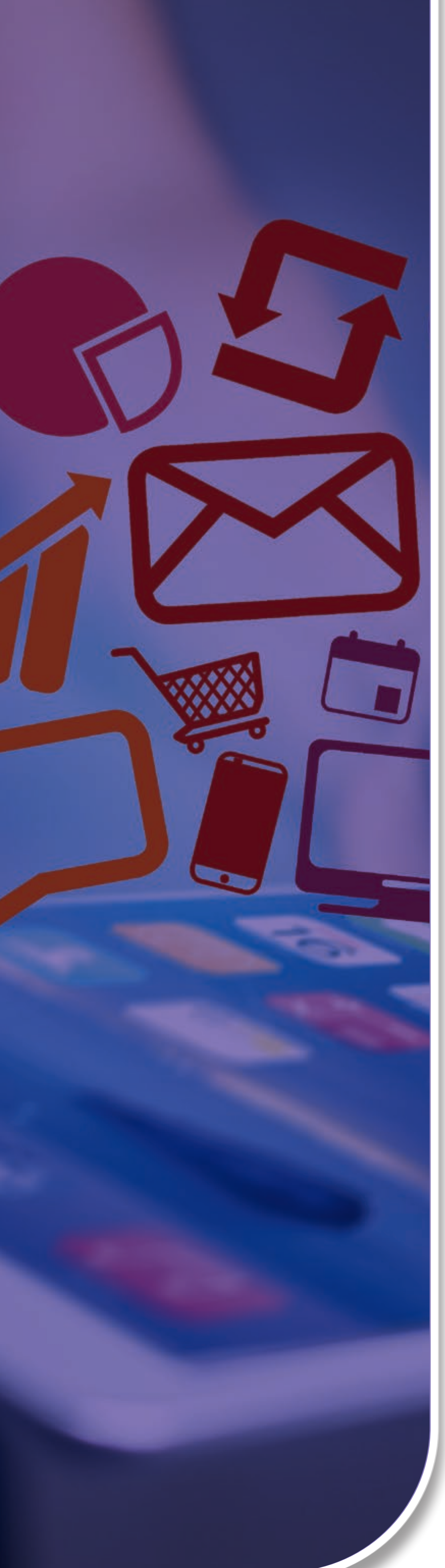
CASE STUDY

Millhouse School Tours is a tour guide operator that arranges a variety of educational trips for children. The business prides itself in having a good reputation and hoping that existing customers continue to book through word of mouth.

Fraser Stirling is a branch manager in the Edinburgh office, where he manages a team of 12. Five schools in Aberdeenshire have booked to visit Edinburgh. Fraser's team needs to come up with educational activities for three days. In past projects, his team have not worked very well together because no one wants to take control and use their initiative. The tweet on the right, which appeared on the company Twitter page, has received some negative comments. The team was appointed by the Regional Manager and it is up to Fraser to work with his team. Fraser has noticed that the people in the team have very similar skills, which means that when it comes to working on the task in hand not a lot gets done. Fraser needs to find a way to make them more productive. He has also noticed that arguments are starting between the team members and they are not mixing well, because they have been put into the team without any 'forming' taking place.

Every time I contact Millhouse School Tours I have to explain my query from the start – they don't seem to have much knowledge and I have to speak to a different employee every time.

Q1	There is conflict within the teams at Millhouse School Tours. **Outline** the four stages of team formation that should take place for a team to be successful. (4)	Building
Q2	For a team to be successful, the members need to have different skills. **Describe** the different skills that team members should have for the team to be successful. (4)	Building
Q3	**Describe** six of Belbin's team roles. (6)	*Strengthening*
Q4	**Discuss** the advantages to the employee and organisation of being part of a team. (8)	*Strengthening*
Q5	**Describe** the reason some teams are more effective than others. (5)	**Extending**
Q6	Using information from the case study, **describe** three different strategies Fraser should use to make his team more effective. (3)	**Extending**



Chapter 4 Workplace legislation

Figure 4.1 The Palace of Westminster, London

Legislation is the laws, regulations and procedures which govern how organisations operate, in addition to outlining their responsibilities.

Legislation covers aspects such as:

- health and safety
- security of people
- security of property
- security of information
- equalities
- employment practices.

4.1 Health and safety legislation

The main piece of legislation governing health and safety at work in Britain is the **Health and Safety at Work Act 1974** (HASAWA). This Act is the umbrella piece of legislation which protects the health, safety and welfare of all individuals within a workplace.

The HASAWA provides broad statements in relation to minimum health and safety requirements and places legal responsibilities on both employers and employees. It covers various factors regarding health and safety and welfare as outlined in Table 4.1.

STUDY TIP

When asked to describe 'features' of a particular piece of legislation, you should give factual points about what it covers, what the responsibilities of employer or employees are, or what risks it tries to minimise/reduce.

Ventilation	Temperature	Lighting	Cleanliness
Room dimensions	Space and ambience	Workstations and seating	Maintenance
Washing and toilet facilities	Drinking water	Rest facilities	Changing and storage facilities

Table 4.1 Factors regarding health and safety and welfare

4.2 Employer and employee responsibilities

The HASAWA places responsibilities on employees as well as employers. This means that both groups need to ensure they are complying with the principles of the law and that they are fulfilling their obligations. Failure to adhere to the legislation will lead to consequences and penalties based on the severity of breach.

Under this legislation employers must:	Under this legislation employees must:
Provide a safe place of work for employees, including safe access and exit, and ensure that entrances and exits are clearly marked.	Take reasonable care for the health and safety of themselves and ensure that they report any faults immediately.
Provide safe equipment and ongoing maintenance of equipment and ensure that regular checks are made on equipment and machinery.	Take reasonable care for the health and safety of other people; be observant and report any hazards outside their own area.
Provide information about safety in the workplace and provide training programmes and advice to employees.	Co-operate with the employer or line manager by attending any health and safety sessions and knowing the organisational policy on health and safety.
Provide information to all employees about safety in the workplace by displaying health and safety information on noticeboards.	Refrain from misusing or interfering with anything provided for health and safety and never operate machinery that they are not authorised to use.
Provide a written health and safety policy, circulate written statements and ensure that details are kept up to date.	Ensure they are fully aware of their organisation's health and safety policy by reading it fully.
Provide a safety representative to represent employees' needs.	Wear the protective clothing that has been allocated at all times (PPE).
	Immediately report any faults or damage to machinery and equipment.

Table 4.2 Responsibilities of employers and employees under the HASAWA

4.3 Health and safety regulations

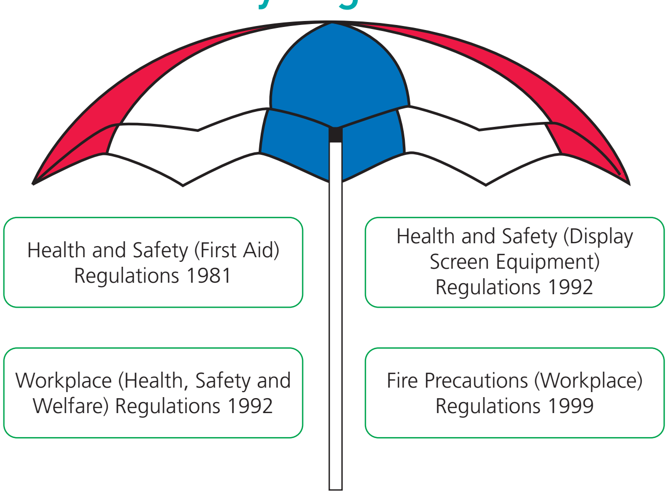


Figure 4.2 Health and safety legislation in the UK

HEALTH AND SAFETY (FIRST AID) REGULATIONS 1981

These regulations state that there needs to be a qualified first-aid person and suitable first-aid equipment depending on the number of employees.

This piece of legislation makes it law for all organisations, regardless of size or ownership, to have appropriate facilities, equipment and staff to provide immediate medical attention to those who receive harm or injury within the workplace.

These regulations require **employers** to:

- ensure that an 'appointed' and trained individual is available to take charge of first aid. It is recommended that there should be one first aider for every 50–100 people
- ensure that a suitably stocked first-aid box is available (containing sterile plasters, bandages, dressings, gloves and safety pins)
- ensure that records are kept of all accidents
- inform all employees about first-aid procedures and protocol.

WORKPLACE (DISPLAY SCREEN EQUIPMENT) REGULATIONS 1992

This piece of legislation was devised to take account of the increased usage of ICT within the workplace. It has had several revisions in order to keep it up to date.

There are significant risks or hazards which can occur in workplaces that use visual display units (VDUs). These include eye strain, headaches, back strain, fatigue and repetitive strain injury (RSI).

This Act stipulates that **employers** must:

- examine workstations and ensure that they are suitable for the work to be carried out
- ensure that workstations meet minimum requirements: the VDU can be adjusted with brightness and contrast, adjustable chairs are provided, footrests are provided if requested, keyboards can be adjusted and are separate from the screen
- ensure that employees are given breaks or can change activity away from the VDU
- provide eye tests if the employee requests this and provide glasses or contact lenses if special ones are needed for VDU work
- consult with all staff members who use VDUs about the nature and arrangements of their work
- examine workstations to assess and reduce the potential risks (e.g. seating, desk height, lighting)
- provide safety equipment upon request (e.g. anti-glare screens, adjustable mice, rested keyboards)
- offer extensive and up-to-date training on performing duties to mitigate risks or hazards
- provide regular eye tests upon request and provide specialist spectacles if required
- break up repetitive tasks or provide regular comfort breaks to avoid muscular or stress-related conditions
- continually review and assess the situation in light of any changes.

WORKPLACE (HEALTH, SAFETY AND WELFARE) REGULATIONS 1992

This piece of legislation explains the minimum acceptable standards of accommodation required of all types of workplaces across the UK.

The provision of a comfortable and hygienic working environment is essential to ensure staff are safe, motivated and happy within the workplace.

These regulations ensure that the welfare and wellbeing of all staff is protected by enforcing minimum standards across all sectors of industry, regardless of risk level.

- **Working environment**: lighting, as far as practical, should be natural. Temperature should be reasonable.
- **Workplace safety**: rooms must be of a specified dimension depending on the number of people using the room.
- **Workplace facilities**: provision of hot and cold running water as well as methods of drying after use.
- **Maintenance and upkeep**: equipment and machinery should be regularly maintained. The workplace should be cleaned and fit for purpose.

FIRE PRECAUTIONS (WORKPLACE) REGULATIONS 1999

These regulations state that there must be a means of alerting people to a fire, suitable means to escape a building, fire-fighting equipment provided and staff trained in areas of fire safety.

This piece of legislation is paired with the Fire (Scotland) Act 2005. Under this law, organisations need to assess their level of risk against particular criteria, categorised as either 'high risk' or 'low risk'.

The risk assessment will determine:

- the potential risks currently within the organisation
- the procedures for reducing the likelihood and severity of these risks
- the type of fire alert and suppression systems required within the organisation.

The assessment will take into consideration the size of the building, the nature of the work being completed and the number of staff within the building.

4.4 Communicating health and safety regulations

Employers must provide information on health and safety to their employees. In fact, by law, any organisation employing more than five staff must produce and issue a written health and safety policy to its staff.

Most organisations will produce their own set of health and safety policies and procedures. The HASAWA provides only minimum standards and many organisations exceed these.

Information can be communicated to employees in the following ways:

- **Induction training**: New employees receive a copy of the company's health and safety policy and may be given familiarisation sessions.
- **Ongoing training**: This might include safe use of equipment, safe lifting and handling.
- **Use of notices**: This could include posting fire alarm procedures, caution signs and no-smoking signs.
- **Demonstrations**: These include first aid, fire drills and evacuation simulations.
- **Organisational handbook**: This is distributed to staff or made readily available and usually includes health and safety policies and procedures.
- **Advice sessions**: Either from the organisation's health and safety officer or from outside agencies for specific issues.
- **Intranet**: This can be used to access health and safety information.
- **Introducing a health and safety representative**: This person should be available for advice and provide information on all aspects of health and safety.

KEY TERM

Induction training – Training that is given to an employee at the start of their job. This lets employees learn about the different procedures in the organisation.

4.5 Consequences of breaching health and safety regulations

It is vitally important that the employer and the employee follow the Health and Safety legislation so that the organisation abides by the law. Failure to do so may result in consequences for both, which are outlined below.

Organisations

The consequences of breaching health and safety regulations include:

- Customers may lose confidence in the organisation, reducing customer footfall.
- Competitors may become more appealing, reducing market share.
- Legal penalties and extensive fines may be imposed, which will increase costs.
- High-profile court cases will be well publicised, leading to a bad reputation.
- Sales and profits will fall as customers begin to use other providers.
- Criminal prosecutions may be brought alleging negligence or manslaughter.

Employees

The consequences of breaching health and safety regulations include:

- a verbal warning
- a written warning
- summary dismissal
- referral to the police
- civil and criminal prosecution.

The Health and Safety Executive

The Health and Safety Executive (HSE) is the organisation responsible for holding organisations to account concerning health and safety legislation.

The HSE investigates breaches of legislation by organisations relating to health and safety. It aims to resolve issues and provide employers with solutions to problems they are experiencing regarding health and safety. It also aims to minimise workplace hazards which can lead to injury, illness, harm or even death.

The HSE has the power to:

- enter and inspect the premises unannounced
- question individuals
- issue improvement notices
- issue warnings
- enforce fines
- temporarily close down the organisation to reduce risk.

4.6 Data handling legislation

With the arrival of modern technology and the internet, organisations now store vast quantities of data and information on a variety of topics, including:

- product specifications
- customer details
- supplier details
- employee details.

TOP TIP

When answering questions on compliance with legislation, you should describe what the organisation/employees can do to meet the requirements of the legislation.

The UK Government and European Union have passed several pieces of legislation aimed at securing and protecting this information and the individuals it pertains to. These laws have placed a large responsibility on organisations to protect this information.

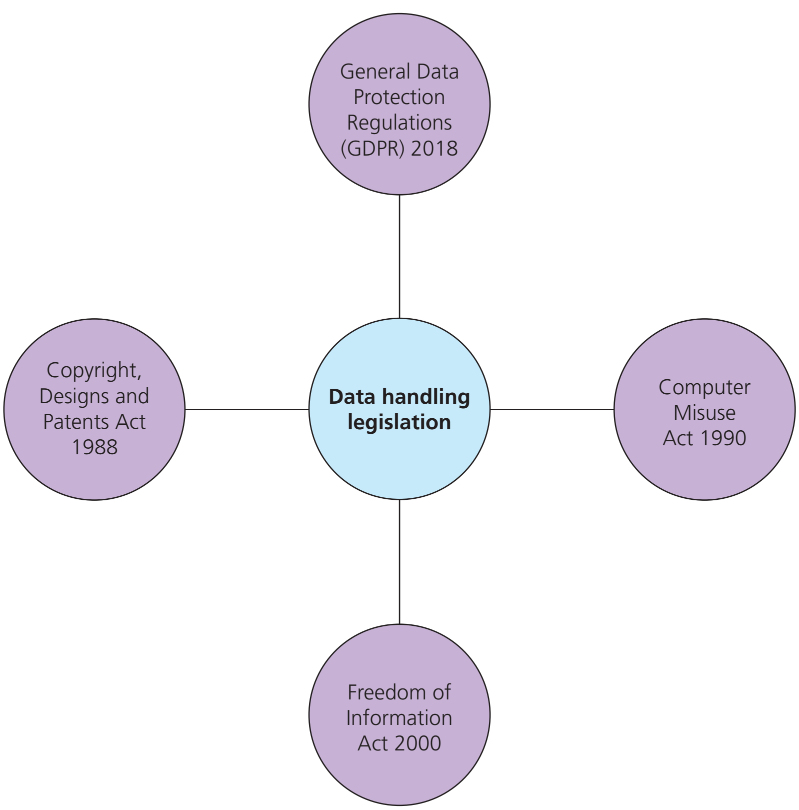


Figure 4.7 Data handling legislation

4.7 General Data Protection Regulation (GDPR) 2018

The European Union (EU) passed the General Data Protection Regulation (GDPR) in May 2018 and it has since been adopted into UK legislation. The legislation aims to safeguard and protect the information held on individuals throughout the EU and beyond, and it applies to all organisations, regardless of size or business activity.

Under GDPR, the following definitions apply:

- **Data subject**: The individual that the data is about (you and me). Examples of the data include name, address and telephone number.
- **Data controller**: The individual or organisation that holds the data.
- **Data processor**: The individual or organisation responsible for directly processing the personal data.

Data subjects have eight rights. These are shown in Table 4.3.

1	Right to be informed	Individuals have the right to be informed about the use of their personal data. The individual is fully aware of what information is being collected and for what purpose.
2	Right of access	Individuals have the right to access the personal information that the organisation holds on them.
3	Right of rectification	Individuals have the right to have any inaccurate personal data about them corrected.
4	Right to restrict processing	Individuals can limit the way in which the organisation uses the data held about them.
5	Right to object	Individuals have the right to object to the processing of their personal data.
6	Right of erasure	Individuals can request that any information that the organisation holds on them be deleted.
7	Right of data portability	Individuals have the right to obtain and reuse their personal data for their own purpose across different services.
8	Right to non-profiling	Individuals have the right not to be subject to a decision based solely on automated means.

Table 4.3 The eight rights of data subjects

Organisations must comply with seven principles relating to the gathering and storing of data. These are shown in Table 4.4.

1	Transparency	Personal data must be processed in a lawful and honest manner, ensuring fairness towards the individual.
2	Purpose limitation	Organisations must have specific reasons for processing the data and these purposes must be highlighted.
3	Data minimisation	Organisations must only collect data related to fulfilling the specific reasons.
4	Accuracy	Organisations must ensure the accuracy of the data and directly relate this to the specific reasons.
5	Storage limitation	The collected data should not be stored for longer than necessary.
6	Integrity and confidentiality	Appropriate technical and organisational safeguards must be in place to ensure personal data is secure.
7	Accountability	All organisations that process personal data must demonstrate compliance with each of the above principles.

Table 4.4 The seven principles of gathering and storing of data

4.8 Computer Misuse Act 1990

The Computer Misuse Act 1990 prohibits unlawful access to computer systems. This law makes it illegal to:

- access computer systems without permission, for example by **hacking**
- access computer systems with the intention of committing a criminal offence
- access a computer system to alter or delete details without permission
- make, provide and supply any equipment that could facilitate a computer misuse offence, such as creating viruses, being abusive in chat rooms and copying material without permission.

KEY TERM

Hacking – Using a computer to gain unauthorised entry to a system – i.e. accessing it without permission.

4.9 Freedom of Information Act 2000

The Freedom of Information Act 2000 allows members of the public to access certain documents, policies and reports from public sector organisations and authorities.

Public bodies are now duty bound to release and publish information that is in the interests of wider society or local communities.

Members of the public are within their rights to request access to **unclassified information**.

KEY TERM

Unclassified information – data that is not personal/sensitive/confidential.

4.10 Copyright, Designs and Patents Act 1988

The Copyright, Designs and Patents Act 1988 gives the creators of certain media channels (for example, books, films, games and music) rights to control how their creations are used and distributed.

When you buy software, for example, copyright law forbids you from:

- giving a copy to a friend
- making a copy and then selling it
- using the software on a network (unless the licence allows it)
- renting the software without the permission of the copyright holder.

WHAT YOU NEED TO KNOW

1	The responsibilities of the employee and the employer in regards to the Health and Safety at Work Act.	✓
2	The purpose of the Health and Safety at Work Act.	✓
3	Data protection legislation.	✓
4	How to communicate legislation changes to staff.	✓
5	Consequences of not complying with health and safety legislation for the employer and employee.	✓

STUDY ACTIVITIES FOR THIS OUTCOME

- Think about what you have to do at school/college to comply with the HASAWA (employee).
- Think about what the school/college has to do to protect you in accordance with the HASAWA (employer).
- Research the legislation that comes under the health and safety umbrella and find out how it is applied in the workplace today. What do businesses have to do so they are not breaking the law?
- Carry out some research on organisations that have failed to comply with data protection legislation.
  - What did they do to breach this legislation?
  - What should they have done differently to comply with this legislation?
  - What is the impact on the organisation of not complying with this legislation?

CASE STUDY

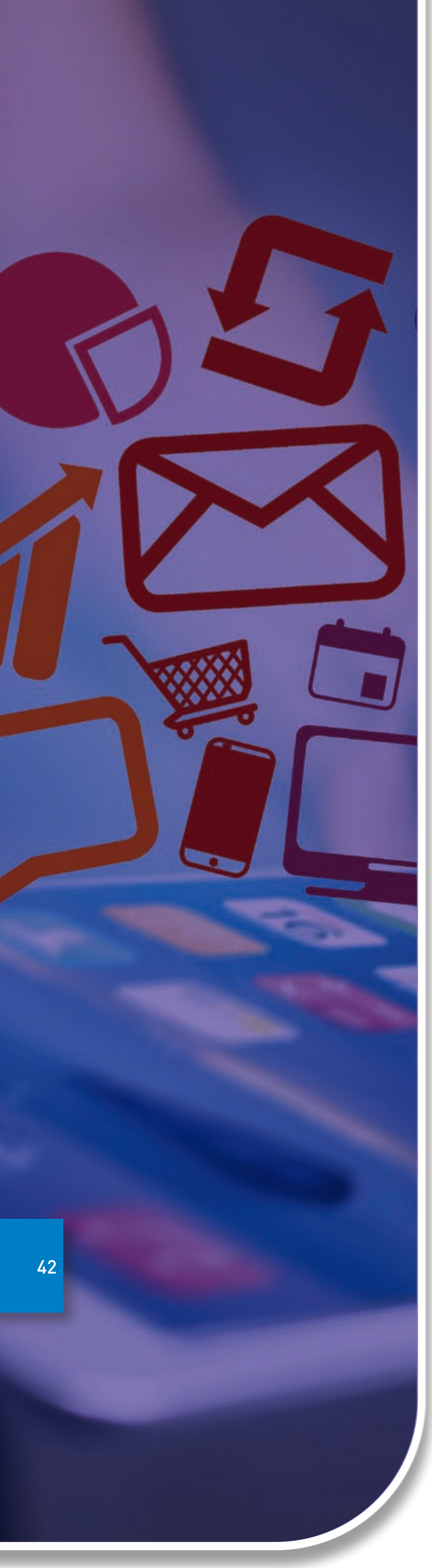
Jennifer works as a claims handler for an insurance broker called Brit Insure. When Jennifer started at the insurance broker, she had induction training and was told about her role and given health and safety training. She had to complete an online module and, because she passed it, she feels that she is well aware of the responsibilities of the employee in regards to the HASAWA.

One day, she was called by someone who she thought was a client of the insurance broker, asking for an update on a car accident that had happened the previous week. Jennifer asked for the claim number. She put these details into the computer and got the details up and she told the person on the line about the state of the claim, giving information about how much was being claimed for concerning the personal injury.

The next day, Jennifer's manager received an angry call from the client who was actually involved in the accident. The client wanted to make a complaint because Jennifer had not followed GDPR legislation. She had failed to ask the person who called for a password or an answer to security questions. The client was very unhappy that personal information had been shared with the person who called (who turned out to be the other person that was involved in the accident).

Zola, the Managing Director, had to investigate this incident as a matter of urgency. She looked through Jennifer's history with the company and could see that she had not been given the up-to-date training on how to comply with GDPR as an employee.

Q1	**Outline** the consequences to Brit Insure of not training their employees in regards to GDPR. (4)	Building
Q2	Brit Insure has breached GDPR. **Describe** the principles of this legislation. (4)	Building
Q3	**Describe** the role of the Health and Safety Executive. (2)	Building
Q4	Items of legislation can change. **Describe** the ways in which an organisation can communicate a change in legislation to their employees. (4)	*Strengthening*
Q5	**Describe** the role of the employer in regards to the Health and Safety at Work Act 1974. (4)	*Strengthening*
Q6	**Describe** the following data handling legislations: • Copyright, Designs and Patents Act 1988. • Freedom of Information Act 2000. • Computer Misuse Act 1990. (3)	**Extending**
Q7	**Explain** the consequences to the employee of not complying with legislation after they have been trained about it. (3)	**Extending**
Q8	**Describe** the role of the employer with regard to the display screen legislation. (6)	**Extending**



Chapter 5 The working environment

The working environment relates to how employees carry out their duties and the way in which the workplace is structured or organised.

Figure 5.1

5.1 Introduction to the working environment

If you were to look at how organisations carried out their activities just 15 years ago, the picture would seem very different from today.

- **New technology**: The internet and other forms of new technology have made communication and exchange of information easy, fast and relatively cheap.
- **Competition**: The highly competitive business environment has forced organisations to streamline their activities and adopt working practices that are cost-effective.
- **Retention of valued staff**: Organisations may have to find ways to encourage staff to stay with them. This would save the cost of training and recruiting new staff.
- **Skills shortages**: Organisations may have to find methods to encourage staff to move to their area for particular types of work.
- **Demographic change**: Changes in the human population such as size, structure and distribution of the population.
- **Flexible work**: In order to retain staff, employers may offer a wide range of flexible working arrangements, including part-time, job-share and flexitime.
- **Flexibility of workers**: Employers can make use of temporary, part-time or fixed-term contracts to cover holidays and busy periods, encourage a more flexible workforce and reduce labour costs.
- **Flexibility of the workplace**: To save space, organisations may introduce hot-desking. Workers do not have their own desks and personal belongings are kept in lockers.

STUDY TIP

For questions relating to this outcome, you should always link back to the impact these changes have had on the employer and the employee. What are the positives/negatives of these changes?

5.2 Types of employment contracts

Organisations will offer their staff different types of contracts. These can depend on the type of work to be done or an employee's lifestyle or outside work commitments.

Permanent

Employees on a permanent contract will have to work the hours that are set out in their contract of employment. The contract does not have an end date. Such employees tend to benefit from adequate training and development, enjoy good career and promotion prospects and a higher degree of job security than employees in other types of contracts.

Temporary

Temporary workers are often taken on as cover during particularly busy periods or holidays. This type of contract does not always have an end date and is often given to someone covering for a maternity leave or on a trial period for a new job.

Part-time

This involves working fewer hours in the week than permanent staff. Part-time refers to the number of hours worked whereas temporary refers to security of employment. A part-timer can work on a temporary or permanent basis.

Part-time employees are entitled to the same wage rates, working conditions and benefits received by full-time workers. However, part-timers receive these benefits on a pro-rata basis.

KEY TERM

Pro-rata – How benefits are allocated or shared based on the proportion of working hours each employee completes. If a part-time employee works 50 per cent of the working week, they receive 50 per cent of the benefits.

Fixed-term

This is where an employee is hired only for a specified period of time. When they are issued with their contract of employment, they will know the specified end date when the contract will be terminated.

Full-time

This is where employees work 35 hours a week.

5.3 Flexible working practices

As working environments have developed and changed, so too have the demands on employees in their personal lives. As there is a greater awareness of a work–life balance, many employees no longer want to work 40 hours a week, five days a week. Organisations are now offering working practices which allow greater flexibility and choice for both the organisation and its employees.

Job-sharing

Job-sharing is a working arrangement where two people voluntarily share the duties and responsibilities of one full-time position, with salary, holidays and other benefits shared on a pro-rata basis according to the number of hours worked. Job-sharers may work split days, split weeks, alternate weeks or their hours may overlap.

Flexitime

Flexitime allows an employee to choose, within set limits, the times they start and finish work. The organisation sets a **core time** when employees must be present, other than authorised absence. Employees will also be expected to work an agreed number of hours. Organisations usually permit an employee to carry over any excess or deficit in hours. Most employers allow **time off in lieu** if an employee works over their required number of hours.

KEY TERM

Time off in lieu – Instead of receiving pay for overtime worked, employees can take additional hours/days off to the value of the additional hours worked.

Homeworking

This is where employees are able to complete their work at home. This will save time travelling to and from the office and can allow employees to remain working despite personal commitments such as having children.

The employee will keep in touch with the office using ICT and may have to go into the office once every fortnight to update with progress.

Figure 5.2

Teleworking

Teleworking is similar to homeworking in that ICT has allowed employees to complete their duties or remits away from the organisation. However, this does not necessarily mean they are working from home. The increased functionality of technology now allows it to be used 'on the move' – on a train, aeroplane or when travelling abroad for work.

Teleworking allows employees to work remotely and keep in touch with the office/line manager using technologies available to them.

Figure 5.3

Hot-desking

Hot-desking is when employees work away from the office; there may be no need to have a dedicated workstation for each person. Instead, employees can use any desk that is free when they need one. This works well for different shift patterns. A hot-desk will usually be equipped with a telephone and PC so that employees can access their work.

Touchdown areas

Employees who regularly work away from the office may need to come into the office for a short time. They may just need to send a quick email or meet someone then leave. Touchdown areas do not need to be booked.

Career break

Different organisations offer different kinds of breaks. Most common are when employees take time off to have a family or take an extended break to go travelling.

Advantages of flexible working practices to the employer	Disadvantages of flexible working practices to the employer
More cost-effective regarding rent and accommodation as not all employees need a dedicated desk/workstation.	Can lead to decreased productivity as it relies heavily on ICT working. Any issues or faults can result in no work being produced.
Reduced absenteeism as employees do not need to take time off for appointments/personal commitments.	There can be difficulties in terms of communication, as information can be misconstrued digitally/electronically.
Staff morale and motivation is increased as they can achieve a better work–life balance.	Difficult to manage and lead a team when they spend most of the time away from the office or are part-time.
The availability of flexible working practices is more attractive to employees with young children/personal commitments, allowing the organisation to retain high-quality staff.	Can be difficult to offer training and staff development opportunities for all employees.
The organisation has access to a wider pool of candidates, allowing more diverse skills, qualities and experiences to be recruited.	High initial cost in regards to providing technology and software.

Table 5.1 Impact of flexible working practices on the employer

Advantages of flexible working practices to the employee	Disadvantages of flexible working practices to the employee
Due to not being in the working environment excessively, employees are generally less stressed because they have more time to 'recharge'.	Employees can feel isolated and unsupported if they are working predominantly at home, away from the support mechanisms of the workplace.
Greater choice concerning where to work, when to work and how regularly they need to attend their working environment.	Employees may not be able to access opportunities such as staff development and training.
Significant reduction in terms of travel, which has a financial saving as well as providing employees with more time to be productive.	There can be a de-personalisation of space and environment, which can have a negative impact on employees' wellbeing.
The opportunity to work flexibly allows greater access and inclusiveness for those with disabilities.	It can be increasingly difficult to form, maintain and develop relationships among colleagues and line management.
Makes it easier for employees to achieve a work–life balance, juggling their personal and professional lives.	Difficult to balance home life and work, with more distractions arising from personal issues. May struggle to 'switch off' from work when at home.

Table 5.2 Impact of flexible working practices on the employee

5.4 The office environment

Most employees feel the benefits of working in a pleasant environment. An environment that takes the needs of its employees and health and safety requirements into account is likely to increase productivity, improve efficiency, and boost the morale and wellbeing of its employees. In turn, a good environment will encourage staff to stay. Environment includes heating, lighting, ventilation, noise, decor, furniture and ergonomics.

Have you ever heard of buildings making someone sick? Researchers have found a phenomenon called '**sick building syndrome**'; employees believe that the building they work in makes them unwell. This is often as a result of poor layout, ventilation, lighting or even decor.

Employees who work in poorly designed and badly maintained office environments often complain of feeling unwell or having symptoms they do not get elsewhere. These can include:

- headaches
- blocked nose
- dry and itchy skin
- rashes
- dry and sore eyes
- tiredness/fatigue
- anxiety.

KEY TERM

Sick building syndrome – A condition whereby people suffer from illness caused by the building in which they work.

Figure 5.4

Wellbeing initiatives

Organisations are now offering health benefits or 'perks' for working in a particular organisation, primarily in occupations with higher stress levels. These initiatives are aimed at improving the wellbeing and mental health of their employees, which should help reduce absenteeism. Examples can include:

- complimentary gym/swimming pool membership
- physiotherapy/aromatherapy to reduce stress
- healthy eating initiatives
- teambuilding/staff morale exercises.

Counselling and grievance procedures

'Time to Talk' services are counselling provisions provided by the organisation. It allows employees to talk in confidence about issues that are affecting them, that, if resolved, will increase productivity.

The most significant reason for staff absence from work is that of stress. Stressed employees may struggle to sleep, become anxious and become dependent on habits such as smoking. These all have a negative effect on employees, reducing concentration and judgement levels and hindering performance.

All organisations should have a clear procedure for employees to follow if they are unhappy about certain aspects of their job, a specific event or incident that has occurred in the workplace or in the way they have been treated. These concerns are referred to as '**grievances**' and details of how an employee can raise these should be contained in their contract of employment.

Grievance procedures are essential so that issues raised by employees are dealt with effectively, efficiently and fairly.

Most grievances should be dealt with informally at first. A casual discussion about the issue and reassurance will often prevent the problems from escalating, which would harm positive employee relations, be time consuming to follow up and also have financial costs.

KEY TERM

Grievance – When an employee has a work-related issue with the organisation that they have made a formal complaint about. This must be investigated and reviewed.

Absence management

Both short-term and long-term absences have negative consequences for an organisation.

Productivity is lost and costs are increased as temporary staff may need to be sourced. Remaining staff have an increased workload to cover the duties of the absent employee; this can cause stress and missed deadlines.

Finally, repeated absences could cause resentment in the workforce. Therefore, it is essential that absence and illness are dealt with efficiently and effectively.

There are a number of procedures that can be put into place to prevent these problems from escalating, yet remaining sensitive to the employee:

- Keep in contact with absent employees and keep them informed of what is happening in their absence.
- Arrange back-to-work interviews to allow for a more coherent return to work.
- Agree staged return-to-work, for example, reduced hours or part-time days.
- Arrange consultations with services such as occupational health or doctors.
- Use disciplinary procedures, if appropriate, for recurring, inappropriate short-term absences.

5.5 Ergonomic environment

Ergonomics is the study of the relationship between employees and their working environment. Furniture is ergonomically designed to decrease the risk of physical strain. In a large organisation, the facilities manager will deal with the work environment.

Office ergonomics should prevent or relieve any work-related conditions or stress. This can be achieved through the correct balance of a variety of features related to the workplace, including the following:

- office furniture
- decor
- lighting
- equipment
- temperature
- ventilation
- layout.

A well-designed, well-laid-out ergonomic work environment reduces the risk of sick-building syndrome and has a huge impact on both the individual and the organisation. A good working environment:

- improves morale and motivation and helps productivity
- ensures effective flow of work
- promotes health and safety at work
- gives a positive image for the organisation
- can be cost-effective, as a result of the above.

A good working environment will often have been ergonomically designed to take account of individual needs, including health and safety issues.

Ergonomics features should include the following:

- **Systems furniture** such as desks and chairs should be adjustable to fit individual employee requirements.
- **Wall colours** should be relaxing, minimise glare and be pleasing on the eye.
- **Lighting** should be non-glare; desktop lamps should be used where appropriate.
- **Ventilation** should consider good circulation of air, but no draughts.
- **Noise** should be controlled with appropriate choice of glazing, walls and floor coverings.
- **Workstations** should ensure privacy and ownership of space.
- **Protective equipment** should be provided for use with ICT, such as wrist-rests and anti-glare screens.

KEY TERM

Ergonomics – How effectively the workplace has been designed to improve comfort, posture and efficiency.

5.6 Office layout

Organisations now design their workplaces not only to suit the workflow requirements, but also with the needs of their employees in mind.

There are two main choices of office layout – cellular or open plan.

Each of these layouts has advantages and disadvantages. ICT has had an impact on these layouts as more modern organisations will have an open-plan layout and be able to share ICT for the benefit of the employees. Most organisations will develop areas such as hot-desks and touchdown areas where ICT equipment, such as laptops and other mobile technologies, can be shared.

Cellular layout

Figure 5.5

TOP TIP

Remember, a cellular office does not necessarily mean there is always only one individual who operates from that office. It could be that all of the Marketing Assistants are located in one office, next door to the Marketing Supervisor.

This type of layout consists of individual offices. The advantages and disadvantages of this form of layout are listed in Table 5.3.

Advantages of cellular layout	Disadvantages of cellular layout
Doors can be closed, and as staff are not in busy environments, it is quieter, which can allow for better concentration.	The division of employees does not promote team working or collaboration within the work environment.
There is a greater degree of privacy, allowing for one-to-one and sensitive conversations to take place.	It is more difficult for management to supervise and control staff as they cannot be easily seen without entering offices.
Individual requirements regarding heating and lighting can be tailored to the employee.	Higher financial cost of heating and lighting the facilities.
There is a feeling of 'status' for management who have their own individual offices.	Duplication of resources (such as printers and telephones) is required, instead of sharing them.
The interior and layout of the office can be personalised and designed for the individual employee(s).	Employees may feel isolated or alone within their working environment.
	Office space is lost by the presence of walls and corridors.

Table 5.3 Advantages and disadvantages of a cellular layout

Open-plan layout

An open-plan layout can be totally open (without any kind of partition of space at all) or 'landscaped', which is more often the case. Landscaped layouts will use plants, furniture and partitions and/or screens to create work areas within one large space. The advantages and disadvantages of this type of layout are listed in Table 5.4.

Figure 5.6

Advantages of an open-plan layout	Disadvantages of an open-plan layout
Resources and equipment can easily be shared among employees, reducing the financial cost of duplicating items.	There can be a lack of privacy for employees dealing with confidential and sensitive information or personal issues.
Allows for easier management and supervision of employees without imposing on them.	The office is generally more noisy, which can be a distraction to employees, reducing productivity.
Staff morale is improved, as they are not working independently all day, improving motivation and rapport.	Heating and lighting cannot be altered to suit individual requirements, which can cause problems in terms of health and welfare.
The layout is more flexible and can be easily changed for future expansion or changing priorities.	It encourages non-work-related discussions among employees, preventing workflow.
	It is more common for time stealers to be present, affecting time and task management.

Table 5.4 Advantages and disadvantages of an open-plan layout

5.7 Workflow

No matter which layout an organisation chooses, it must ensure the correct workflow. Workflow is the way in which business activities are planned and structured to maximise productivity and efficiency.

Impact of ICT on workflow

Developments in ICT have undoubtedly improved workflow. The ability to access shared information, transmit information electronically and communicate around a computer network have all reduced the need for movement and duplication of documents.

- **Local and wide area networks** have allowed organisations to access and communicate information as never before, without the need for paper copies to be passed around from desk to desk.
- **Email** has allowed fast communication without staff leaving their desks; documents can be sent between departments and meetings can be arranged and even held online.
- **Networked software**, such as databases and electronic diaries, allow users to access centrally stored information at their desks.

In addition, as technology has led to de-layering of organisations, the impact on workflow has been to remove tiers, which in the past often hampered communication and the flow of information.

To summarise, the impact of ICT on workflow can result in:

- reduced need for movement of people
- faster communication around the organisation
- reduced need to accommodate people in specific areas
- fewer layers of management around which information has to flow
- reduced amount of lost/misplaced documents
- less time wasted
- reduced costs.

5.8 Methods of communication using ICT

Organisations now rely on modern technologies to communicate with their employees. The examples listed below mean that employees can communicate with each other 24/7 and while 'on the go' outside the office.

- **Mobile phone technology**: The features of mobile phone technology are always changing. The main ways to communicate by mobile phone are through SMS, FaceTime and Skype. You must be aware when using mobile phones that problems can occur with regards to battery levels and signal.
- **Email**: This is an extremely quick way to communicate and most email accounts can also be used through mobile phones. The benefits of using email are that the same message can be sent to a number of people, files can be sent as attachments and it can be used anywhere in the world.
- **Instant messaging**: This allows you to have a private chat or discussion with another user. You can exchange messages in real time, which is just like a telephone conversation but using text.

Figure 5.7

- **Wikis**: This is a collection of articles on the internet that users can add to and edit freely.
- **Blog**: This is an online diary where thoughts and opinions can be displayed.

5.9 Software applications

Most organisations will choose the software that best suits their business needs. The most common software applications are outlined in Table 5.5.

Word processing	• This is used to create various business documents such as letters, reports and minutes. • The main functions are creating tables, formatting text, creating electronic forms and mail merging. • The advantages of word-processing software are improved accuracy and quality of documents, ease of making changes to documents and integration with other software applications.
Spreadsheets	• These are used to perform calculations and analyse numeric data. • The main functions are calculations carried out using formulae, formatting of cells and producing charts. • The advantages of spreadsheets are that calculations are more accurate, data is updated if inputs are changed, data can be analysed using 'IF' and 'Sum IF' etc., and charts can be used to help understand data.
Databases	• These are used to store vast amounts of information (like an electronic filing system) about customers, suppliers, employees, etc. • The main functions are sorting data, performing queries and displaying data in reports. • The advantages of databases are that information can be kept secure using access rights, information can be found quickly using criteria in queries, mail merge can be used to link information to other documents, and data can be formatted and updated as appropriate.
Presentation software	• This is used to present information using slides and handouts. • The main functions are to add animation effects, action buttons, hyperlinks and speaker notes and use of sound and graphics to present information in a more interesting way. • The advantages of presentation software are that it can be used to gain the audience's attention, information can be integrated from other applications to support the presentation and presentations can be given a more professional look.

Table 5.5 Common software applications

5.10 Networks

Organisations use networks to access and communicate information without the need for paper copies to be passed around the office.

Local area network

Local area networks (LANs) use servers to connect computers and peripherals within small geographical areas.

Advantages of LANs	Disadvantages of LANs
Easy to share peripherals such as printers and photocopiers, which can reduce costs.	If the network goes down, then no one can access files, which will slow down productivity.
Makes it easier to share files and information with employees.	If the file server is damaged or stolen, then all files could be lost.
Back-ups can be made on a regular basis, which reduces the chance of losing files.	A virus can spread very quickly over a LAN.
Security can be set to restrict access to certain areas of the network (access rights).	

Table 5.6 Advantages and disadvantages of LANs

Wide area network

A wide area network (WAN) is a network that connects computers on a worldwide scale. The best example of this is the internet, but a WAN can also be used to connect different branches of an organisation anywhere in the world.

Advantages of WANs	Disadvantages of WANs
Data can be transmitted between branches very quickly.	People outside the organisation could have access to your data, so tight security measures must be in place.
Gives easy access to the internet.	There is no control over external websites; they can be removed or changed by the owner so some pages could become unavailable.

Table 5.7 Advantages and disadvantages of WANs

5.11 Websites and e-commerce

Most organisations now use the internet to advertise their business, job vacancies and, most importantly, for e-commerce (trading on the internet).

Advantages of e-commerce	Disadvantages of e-commerce
The organisation can reach a wide range of customers worldwide.	The cost of setting up a website and keeping it up to date can be high.
Customers have access to the site 24/7, which could increase sales.	Security systems have to be in place to ensure that the customer has no worries about inputting personal information.
The organisation can reduce costs by not needing to extend premises and not having to increase staffing.	Organisations lose out on face-to-face contact with customers.
Customers can shop from the comfort of their own homes and get products delivered to them.	Some customers like to see products before they decide to buy them.
Organisations can monitor what customers are buying and use this information for marketing purposes.	

Table 5.8 Advantages and disadvantages of e-commerce

5.12 File management

File management is the organisation of computer or paper files. Organisations will put their own procedures in place to ensure that files are stored properly.

Figure 5.8

Procedures should cover the following:

- **File locations**: Information should be given on where files should be stored, for example, on the server, in which location and whether an external storage device is required.
- **File names**: Files should be stored in named folders with appropriate file names that will make it easy to find files.
- **Routine maintenance**: Information should be provided to staff about deleting unnecessary files, as storage may need to be freed up on the server.
- **Back-up procedures**: Back-up copies should be made on a regular basis and staff should know the procedure for this. Some servers may automatically back up data on a regular basis.

File management is really important to organisations and it is vital that information can be found when needed.

5.13 Consequences of good and bad file management

The consequences of bad file management are as follows:

- Time will be wasted looking for files, which can lead to stress for staff.
- Relationships with customers could deteriorate as they may complain if information cannot be found.
- Computer systems could slow down as the server is holding too many files.
- Wrong management decisions could be made if out-of-date information is used.

The benefits of good file management are as follows:

- Targets have a better chance of being met if you have good file management.
- The information that the organisation stores is accurate and will be reliable.
- Information can be found by different employees.
- The business's reputation will be enhanced if information can be found promptly, resulting in an increase in customer satisfaction.

WHAT YOU NEED TO KNOW

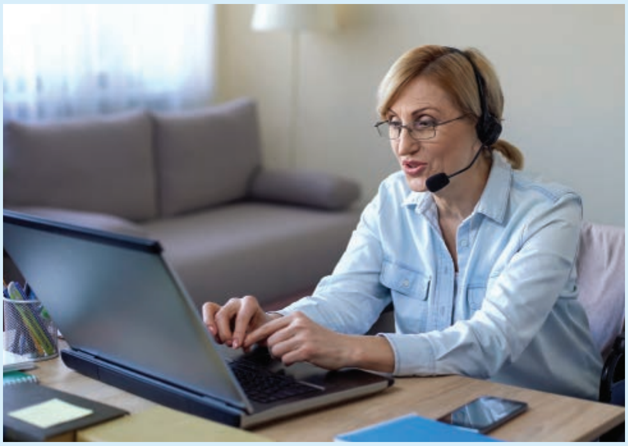
1	Flexible working practices	✓
2	Office layout and ergonomics	✓
3	Employee morale and wellbeing	✓
4	Data management	✓
5	File management	✓

STUDY ACTIVITIES FOR THIS OUTCOME

- Create a mind map which describes the different flexible working practices. Use a different colour for each different working practice. When you have completed your mind map, add the different advantages and disadvantages for the flexible working practice.
- Speak to a family member/friend/carer and discuss reasons why an organisation should opt for an open-plan layout. Why might it not be good?
- Repeat the above activity for a cellular layout.
- Think of a time you were in a teacher's classroom, an office or a shop. Was the desk messy and did the person you were speaking to seem disorganised? List the disadvantages of this. How did it make you feel about the organisation?
- Justify why it is good for a teacher to have good file management skills. Once you have done this, justify why you think it is good for a member of the office to have good file management skills.
- Give examples of LAN and list advantages and disadvantages. Give examples of WAN and list advantages and disadvantages.

CASE STUDY

Esme Murray works for EuroExplore, a British-based travel organisation which has its head office in Aberdeen. Esme works in an office where resources are shared and where she can ask for assistance from her co-workers because it is an open-plan layout.

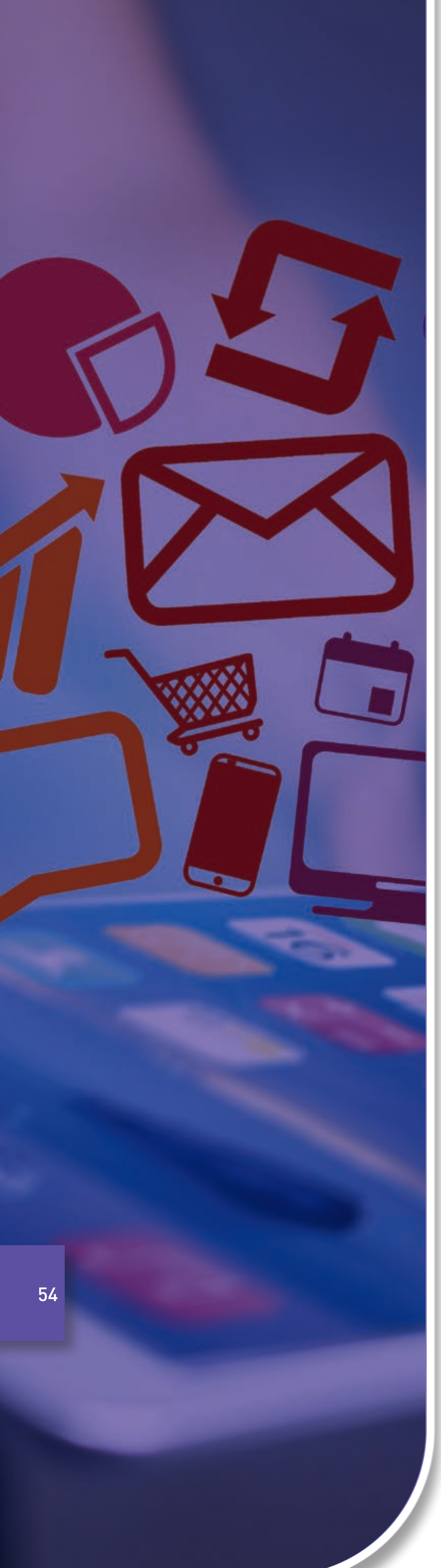


Esme has been working for the company for over seven years and her branch manager Ayesha knows that she is a good worker because her file management skills are excellent and she gives a first-rate impression of the company. Esme, however, was looking for a break from the company and was about to request a career break, but since the Coronavirus outbreak, many businesses have been struggling to conduct business as normal so she has decided to delay this. As the virus spread, economies were impacted. Many staff in the UK were furloughed and in some industries such as tourism, some staff had to reduce their hours to cope with the lack of demand for people going on holiday and many people have lost their jobs.

As the virus continued to spread, EuroExplore told their workers to work from home to deal with customers having to cancel their holidays and potentially delay the holiday to the following year.

Remote working does not suit everyone as many people enjoy working 9–5 at the office. Commuting to work, no matter how inconvenient, is a part of our routine.

Q1	Esme is having to homework. **Outline** what homeworking is. (2)	Building
Q2	Esme had considered taking a career break. **Describe** what a career break is and **justify** the advantages to the organisation of offering career breaks. (3)	Building
Q3	**Describe** ergonomic features. (3)	Building
Q4	Esme has excellent file management skills. **Discuss** the benefits to an employee and employer of good file management skills. (4)	*Strengthening*
Q5	When working from home, Esme uses LAN. **Explain** the advantages of using LAN. (2)	*Strengthening*
Q6	**Discuss** an open-plan office layout. (6)	*Strengthening*
Q7	EuroExplore offer homeworking and career breaks for their employees. **Discuss** the use of flexible working practices to the employee. (6)	**Extending**
Q8	**Describe** absence management procedures that can be put in place by an organisation. (4)	**Extending**



Chapter 6 Customer care

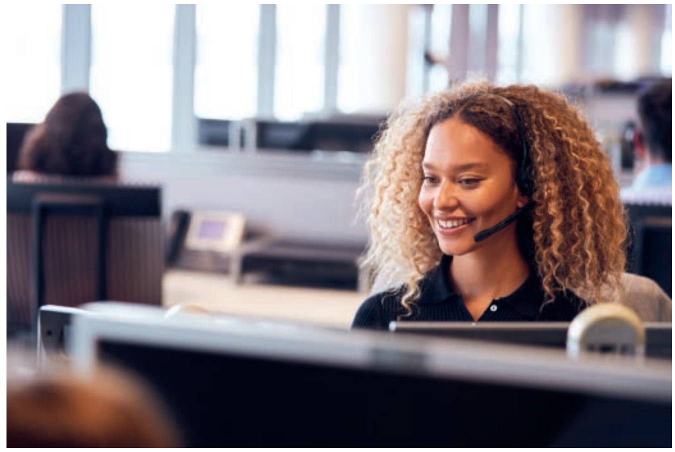


Figure 6.1

In today's competitive business environment, the old expression 'The customer is always right' should perhaps be replaced with 'The customer can always go elsewhere.'

It costs a business far more to attract a new customer than to retain an existing one. One way they can retain customer loyalty is by the quality of their customer service. This goes beyond simply complying with consumer legislation, it is about giving 'added value' to a customer's experience when using the organisation. It involves going an extra mile so that the customer will want to come back.

Examples of good customer service include:

- creative problem solving
- selling a quality product
- customer self-service
- providing good after-sales service
- being polite to customers and showing an interest.

TOP TIP

When asked to measure customer service, think of an increase or decrease of the impacts you have been learning since the start of this book. For example, one way to measure customer service is an increase in positive reviews.

6.1 Features of customer care

Many big organisations will have a customer care strategy that gives a written outline of their customer care policy and plans for dealing with customers. The aim of this strategy is to ensure that customer care is high on the list of their priorities. A customer care policy will include the organisation's policy and plans for the following:

Customer-service statement or promise

These are directed at customers and may detail what they should expect in terms of how the organisation will deal with them, deadlines and quality of service. Some organisations have even gone so far as to promise penalty payments if they do not meet their promised deadline for solving a problem. For example, gas and electricity companies may promise to pay £x for every day they are late in reconnecting a service.

Service level agreements

These are staff guidelines for dealing with external customers and will contain details such as how many times a telephone may ring before it must be answered, the greeting that is to be given, the length of time in which a customer should be dealt with, and so on.

Loyalty schemes

These have been introduced by organisations to 'reward' customers for loyalty to the company's service or product. Loyalty cards, frequent travel air miles and discounted petrol are common loyalty rewards.

Complaints procedure

These are formal procedures both for customers when making a complaint and for the organisation when dealing with a complaint. These clarify the means by which a complaint should be made, to whom, the length of time to expect a complaint to be acknowledged and then dealt with, and any other information such as the address of the relevant Ombudsman.

Many customers will be happy to remain with the organisation following a complaint, providing their complaint is dealt with in the right way.

Organisational procedures

These provide for staff the detailed stages a complaint will go through, and at each stage the member of staff who will deal with the complaint, by when, and what outcome there should be. Underpinning this will often be guidelines as to how to deal with complaints or even checklists staff will operate by.

Mission statements

A Mission statement is a short statement of the aims of an organisation and how these aims will be achieved. It contains the values of the organisation, which may improve its image, for example:

- being eco-friendly
- Fair Trade policies
- demonstrating fairness to staff and the local community.

6.2 Benefits of effective customer care

The biggest benefit of effective customer service to an organisation is that of customer loyalty. As mentioned earlier, it is far better to retain customers than win new ones. Customer loyalty does not just mean repeat business; it brings other rewards such as recommendations to new customers and setting a tradition of use by the wider family.

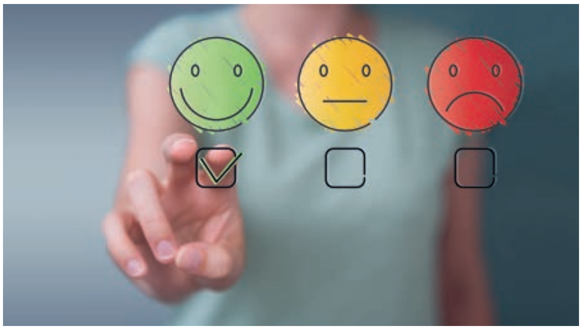


Figure 6.2

Consequences of good customer care	Consequences of bad customer care
Satisfied customers are much more likely to come back and repeat business.	Bad publicity results from poor customer service as people always tell others about their experiences.
Satisfied and motivated employees work better together as a team.	A poor reputation is difficult for an organisation to lose and it also has implications for recruitment, falling market share and the impact of any advertising the organisation undertakes.
Low employee turnover means that employees do not leave the organisation so less money is spent on recruiting and training new staff.	Dissatisfied customers do not come back. Many people do not complain about poor service, they simply do not return, resulting in falling income. Think of how you react to a disappointing meal in a restaurant.
Reduced costs as attracting new customers is costly in terms of advertising and sales promotions.	In extreme cases, the organisation may be subject to legal action. This will involve legal costs for the company and may involve compensation payments.
A good reputation enables a business to attract customers and will attract good staff as well.	Increased resources have to be spent on sorting out problems with customers. These resources could be used elsewhere in the business.
May result in giving the organisation a competitive edge, increased market share and bigger turnover.	Staff are more stressed if they receive complaints.

Table 6.1 Consequences of good and bad customer care to an organisation

6.3 Customer complaints procedures

Things go wrong sometimes in all organisations. Complaints can be an opportunity for the organisation to show commitment to their customers and demonstrate that complaints are handled effectively. By doing this, customers who may have been thinking about leaving the organisation will use the organisation again.

Features of a customer complaints procedure

Most organisations have an established complaints procedure. The important features of an organisation's complaints procedure are as follows:

- The complaints procedure should be made available to customers and known by all staff.
- Complaints (regardless of how they are made – verbal, email, phone, in person or written) should be logged and acknowledged immediately by someone in the organisation trained in handling complaints, usually in writing.
- The customer should receive details outlining the process of investigation and clear timelines should be established to ensure prompt investigation. For example, 'We will investigate your complaint and contact you again within seven days.'
- The customer should be kept informed of progress and the result of the investigation. Compensation might be offered. Details should be provided so an appeal/further action can be made, for example, to the Ombudsman.

- Employees tasked with handling complaints should be trained to listen, establish the facts and agree with the customer about what to do next. Often the same person is allocated to deal with the complaint from start to finish so the customer knows who to refer to.
- Complaints should be reviewed regularly by a senior member of management to identify patterns or particular problems.

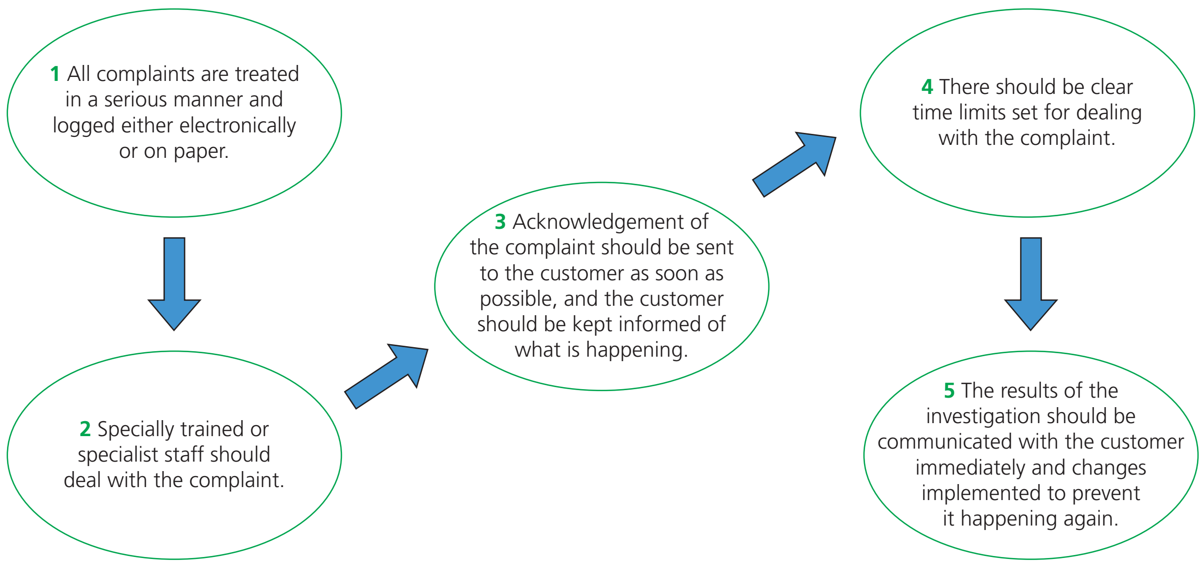


Figure 6.3 Stages in a successful complaints procedure

Social media and customer complaints

Social media, such as Facebook, Twitter and Instagram, is used by millions of people to complain about a product or service. The drawbacks of an organisation using social media to handle complaints are outlined below:

- Social media is in the public domain so negative comments can be seen by others, which will lead to other negative comments on non-related matters.
- Can damage the reputation of the organisation.
- Volume of tweets may mean that the organisation misses the complaint, which will delay the response and give the organisation a bad reputation.
- May require a dedicated member of staff to read tweets or software to be developed to scan social media for comments – cost implications.
- Lacks privacy to deal with sensitive issues.
- Difficult to build trust/rapport with customers online.
- Difficult for the organisation to retain staff or recruit.
- May result in a breach of legislation if an employee does not respond appropriately or have the right training.
- Restriction in characters – often requires an additional communication method, such as the telephone, to resolve complex matters.

6.4 Methods for monitoring and evaluating customer care

Methods for monitoring and evaluating customer care include the following:

Market research

Market research is used to gain information relating to the marketplace. Market research not only analyses such things as the product, its price and the competition but will also include customer attitudes towards the service they receive. Organisations listen to their customers and place value on their views. In order to hear these views, they may use customer focus groups, satisfaction surveys and face-to-face interviews.

Customer focus groups

Listening to customers means finding out what they are saying and there are various ways of collecting the information required. Customer focus groups are small groups of customers brought together to provide the organisation with feedback on their goods and services, proposed new products and deletion of lines no longer profitable.

Advantages of customer focus groups	Disadvantages of customer focus groups
Can provide instant feedback on products and services.	Only provides a viewpoint from a small number of customers.
Can provide opinions on proposed new products and services.	All customers cannot be invited to attend so the organisation is sampling responses.
Can make suggestions on how improvements can be made.	Events tend to be held irregularly.
Customers feel they are being listened to which encourages brand loyalty.	Expensive to run – expenses have to be paid and accommodation booked for meetings.
Clarification can be sought on points from customers.	

Table 6.2 Advantages and disadvantages of customer focus groups

Satisfaction surveys

The most formal method of measuring customer satisfaction is to use a questionnaire. These questionnaires or written surveys provide a permanent record of what customers feel and the results can be analysed for statistical purposes.

Written surveys

A written survey is usually a form running to several pages that asks for the customers' opinions on products and services.

Advantages of written surveys	Disadvantages of written surveys
Feedback on a wide range of areas including products, service received, staff attitudes and knowledge, etc. can be sought.	Time consuming for customers to complete, which can result in low completion rate.
Information can be easily gathered and collated to produce a report.	Poor number of returns from customers.
Variety of types of questions, such as tick box, open-ended, etc. can be asked.	Wording of question is crucial – questions should be pre-tested using a pilot survey.
Able to get viewpoint from wide range of customers.	Many questions based on tick boxes – tends to be inflexible.
Incentives can be given to complete and return, e.g. prize draws, free products.	

Table 6.3 Advantages and disadvantages of written surveys

Telephone surveys

There has been a huge rise recently in the use of call centres to carry out telephone surveys. Most surveys are outsourced by organisations. Customers are telephoned to find out their opinions regarding goods and services.

Advantages of telephone surveys	Disadvantages of telephone surveys
Immediate response to a range of carefully worded questions.	Time consuming to gather information for organisations.
Customers are able to give feedback to questions and also make unprompted suggestions.	Many customers are reluctant to spend time going through a questionnaire.
A wide range of customers can be targeted.	
Issues can be clarified and questioned in depth in response to customer comments.	

Table 6.4 Advantages and disadvantages of telephone surveys

Comment cards

Comment cards are small cards that are left in areas where customers can quickly complete them while waiting, e.g. at reception or in hotel rooms.

Advantages of comment cards	Disadvantages of comment cards
Quick to complete – a small card with several carefully structured questions.	Not much space for comments or suggestions.
Simple to complete – usually a tick box to indicate degree of satisfaction, e.g. always satisfied, usually satisfied, sometimes satisfied, etc.	Usually focuses on only one or two aspects of service.
Can be given to customers to complete while waiting, e.g. at hotel reception to check out.	
More likely to get a higher number of returns than with a full questionnaire.	

Table 6.5 Advantages and disadvantages of comment cards

Online feedback surveys

Increasingly, online surveys are being used as people find it quick and simple to complete online forms. Customers respond to a series of questions online, often as a link from an email.

Figure 6.4

Advantages of online feedback surveys	Disadvantages of online feedback surveys
Forms are user friendly and not time consuming to complete.	Not all customers have email/internet access.
Customers can complete them at their leisure.	Some customers who do not have IT skills find it difficult to complete online forms.
Feedback data can be collated automatically by a service provider.	
More likely to get a high volume of responses than with a written survey.	

Table 6.6 Advantages and disadvantages of online feedback surveys

Face-to-face interviews

Organisations employ people to stop customers in the street to interview them on a one-to-one basis to find out their opinions on products and services.

Advantages of face-to-face interviews	Disadvantages of face-to-face interviews
Useful for gauging customer reactions, including body language.	Time consuming and expensive to collect data.
Immediate response given by customers.	Many customers are reluctant to take the time to participate.
Issues can be clarified and questioned in depth in response to customer comments.	

Table 6.7 Advantages and disadvantages of face-to-face interviews

Mystery shopper

A mystery shopper is someone who is employed to act as a customer and report back on the service they receive. This information is given to staff and any concerns regarding poor standards can be rectified. Praise may also be given to staff if the mystery customer has a good experience.

Advantages of mystery shoppers	Disadvantages of mystery shoppers
Gives a clear sample of what a potential customer might experience.	Does not allow for variations in the standard of service throughout the organisation.
Gives a starting point for other types of survey.	Only assesses front-line customer service.

Table 6.8 Advantages and disadvantages of mystery shoppers

Quality management systems

The responsibility for managing quality rests with management. Quality management systems include monitoring standards to ensure that products and services conform to the standard customers want, so customers have a big influence on setting the quality demanded.

Quality standards include appearance, safety, availability, after-sales support, customer service and value for money.

It is policy in some organisations to deal only with companies that hold a particular quality standard. Most standards involve organisations providing evidence of continual monitoring and quality improvement activities as well as quality manuals that set out policy, procedures and quality standards which are followed by everyone in the organisation.

WHAT YOU NEED TO KNOW

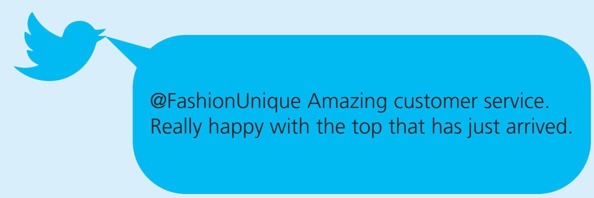
1	Examples of good customer service.	✓
2	Features of customer service.	✓
3	Benefits of good customer service.	✓
4	Consequences of bad customer service.	✓
5	Monitoring and evaluating customer service.	✓

STUDY ACTIVITIES FOR THIS OUTCOME

- Think of a time when you have experienced good customer service (at the shops, gym, cinema, doctor or school). How did that make you feel about the organisation and would you use the organisation again? Make a list of what the good customer service was and what you think the positive impact was on the organisation.
- Think of a time when you have experienced bad customer service (at the shops, gym, cinema, doctor or school). How did that make you feel about the organisation and would you use the organisation again? Make a list of what the bad customer service was and what you think the negative impact was on the organisation.
- Imagine it is your job to find out what customers think of your service. Read for 15 minutes the 'Methods for monitoring and evaluating customer service' part of this unit. Create a mind map detailing how you would monitor the customer service without your notes and then go back and check your answers.

CASE STUDY

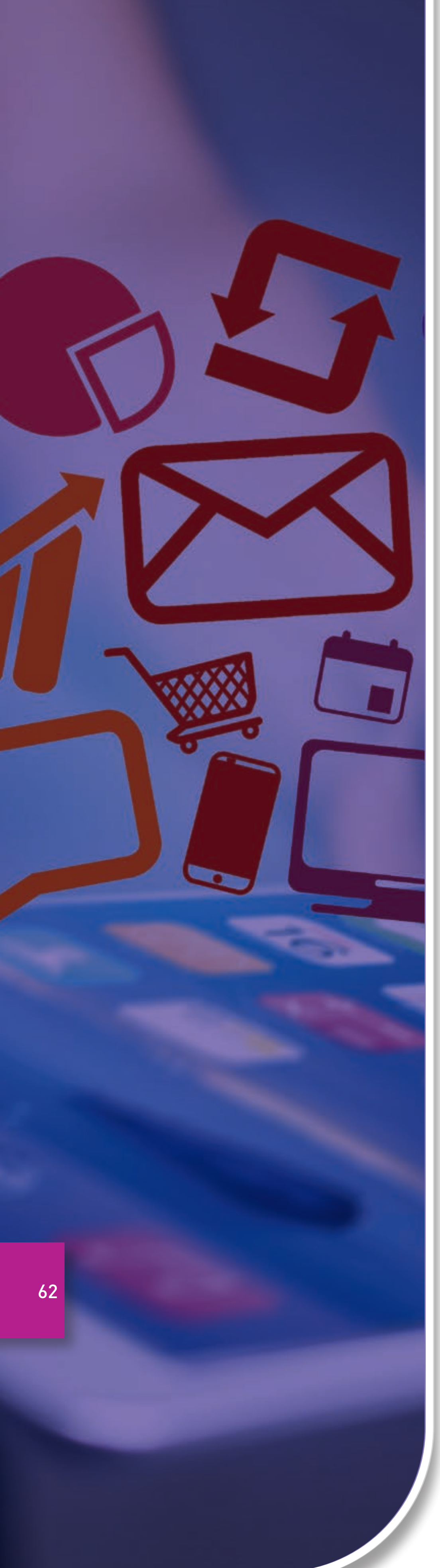
Online fashion retailer FashionUnique, which was created by Bijal Barik, is a fantastic example of a company that uses social media to its advantage when it comes to providing excellent customer service.



The FashionUnique Twitter account has over one million followers. However, rather than using the account simply to promote itself, FashionUnique actively responds to hundreds of customers with a friendly and caring approach each day. There is even a separate 'Here to Help' Twitter account especially for helping customers with any problems that they have.

By having such a friendly and proactive customer service team, FashionUnique can maintain its following and ensure problems are dealt with effectively before they have time to escalate or result in making the company look bad.

Q1	**Outline** the ways an organisation can demonstrate having good customer service. (3)	Building
Q2	**Outline** the features of an effective complaints procedure FashionUnique might use. (4)	Building
Q3	**Explain** the consequences to the organisation of bad customer service. (4)	*Strengthening*
Q4	**Explain** the benefits to the organisation of providing good customer service. (4)	*Strengthening*
Q5	**Describe** the ways an organisation can monitor customer care. (5)	*Strengthening*
Q6	**Discuss** the ways an organisation can monitor customer care. (6)	**Extending**
Q7	**Explain** the negative impact of using social media to complain about a service. (4)	**Extending**



Chapter 7 Methods of communication

Figure 7.1 Effective communication is vital to the success of an organisation

A vital factor within an organisation is communication. It is important that everyone in an organisation can communicate effectively with each other as well as with customers. It is important when choosing a method of communication that consideration is given to the relationship between the sender and the receiver and also how quickly information has to be passed on.

TOP TIP

Don't confuse 'methods' and 'types' of communication. 'Types' relates to internal or external and formal or informal, while 'methods' is how this communication is actually delivered, for example, face to face.

7.1 Audience

When planning to communicate information, the presenter or manager must consider who is receiving the information; this is their 'audience'.

The experience of the audience will be crucial in how they engage with and analyse the information being delivered.

An audience does not necessarily mean a crowd of employees watching a presentation or speech. A meeting has an audience and even an interview between two people has an audience – anyone listening to information.

The main methods of communication are as follows:

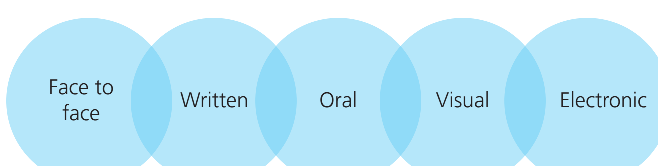


Figure 7.2 Types of communication

7.2 Face-to-face communication

Face-to-face communication is used if feedback is required immediately or if there are areas requiring clarification. With face-to-face communication both parties can gauge body language and facial expressions which can aid understanding and reveal more depth.

Examples of face-to-face communication can include:

- presentations
- meetings
- interviews.

Presentations

Delivering a presentation usually involves a presenter speaking to a large audience. This method is good when the same information needs to be passed on to a large audience of individuals.

Everyone receives the information at the same time, which is advantageous. However, the presenter has to be highly skilled in order to sustain the engagement of the audience.

Many presenters allow the audience to ask questions, which can deepen understanding. However, some audience members may not feel confident enough to ask questions in front of a crowd, resulting in them not fully understanding the information that has been passed on.

Figure 7.3

Meetings

Meetings allow for people to gather together, usually in small groups, to share information and discuss ideas and strategies. Meetings can be formal or informal.

A formal meeting will have set procedures to follow and require specific documentation. This will mean that a record is kept so that those attending and those who were not able to attend can review what was discussed and agreed.

Interviews

Interviews are a good way of getting **qualitative** and in-depth opinions, thoughts and feelings from one individual.

Interviews are used in the selection process. Management will ask applicants a series of questions to assess their capability and suitability for a position.

KEY TERM

Qualitative – Means that you are gathering data about the opinions and thoughts of individuals as opposed to numerical data or statistics.

Figure 7.4

Advantages of face-to-face communication	Disadvantages of face-to-face communication
The information is quickly and directly transmitted to the interested parties.	There is no record of what was said, which can cause problems if there is a disagreement.
It is easier to express feelings/opinions, which avoids possible misunderstandings.	Distractions and interruptions can affect the quality of communication.
The person receiving the information can ask and answer questions and gather feedback.	It may be difficult to control if there is a large number of people talking over one another.
Physical gestures aid understanding, e.g. head movement, facial expressions, posture or eye contact.	Strong personalities and emotions may cause a barrier and prevent effective exchange of ideas or opinions.

Table 7.1 Advantages and disadvantages of face-to-face communication

7.3 Written communication

Written communication is used when important information needs to be communicated in full. It provides a permanent record that can be used for future reference. It also allows individuals the time to read and fully understand the information before acting upon it.

Examples of written communication can include:

- letters
- reports
- memorandums (memos).

Letters

Letters are the most traditional method of communication. They are usually formal documents which use formal language and follow a house style in terms of layout.

Letters are used to send important and confidential information such as:

- offering a job within an organisation
- changing the terms and conditions of a policy
- answering a complaint.

Reports

Reports are prepared internally to present research and findings on a particular issue which can be used to formulate policy and procedure.

Reports follow a clear structure and are written in formal language. They provide a permanent record for future reference which staff can refer to when they want clarification on something. However, these are often extensive and lengthy pieces of literature. Employees can become confused with the language used and may get tired reading through the wording of the document.

Memorandums (or memos)

Memorandums or memos are internal messages or letters sent via paper. They are used to send the same message/information to a group of individuals who are usually on the same level of seniority.

With the arrival of ICT, memos have become slightly redundant as most correspondence is done through email. However, memos are still used when attached to tasks for completion by staff.

Advantages of written communication	Disadvantages of written communication
Can be re-read if needed so acts as a permanent record.	Can take longer to prepare and, in some cases, send to the recipient.
Structured and consistent so everyone receives the same information.	Recipient is not able ask for explanation if unsure of anything.
Often suitable for formal communication and should be good quality.	Use of jargon and technical language impacts on level of understanding.
Available to read at a time convenient to the recipient.	Does not allow for immediate feedback or interaction so less flexible than other forms of communication.
Recipient can take time to read and absorb main points to ensure understanding.	The sender cannot use non-verbal cues (body language) to assess understanding.
	Inaccessible to some, e.g. people who have learning difficulties such as dyslexia.

Table 7.2 Advantages and disadvantages of written communication

7.4 Oral communication

Oral communication is used when a quick answer is required to something. This is the primary method of communication used by organisations.

With the arrival of mobile technologies, it has become a more convenient method of communicating with employees, customers and suppliers globally. Two-way conversation is generated, allowing for clarification.

Examples of oral communication can include:

- audio conferencing
- telephone call
- Skype call.

Audio conferencing

It is now possible for individuals to communicate electronically with others around the globe using a connected phone or laptop. This has allowed for meetings to take place globally without the requirement for expensive business travel.

Although there is a financial saving, it is difficult to schedule these meetings at a time which is convenient for everyone due to factors such as time differences and cultural events. Language barriers also pose a significant problem to audio conferencing.

Telephone

This is one of the most traditional methods of communicating with colleagues, suppliers and customers. The arrival of mobile phones has removed the need for landline cables. It is also more convenient, as mobile phones can be taken anywhere when needed.

This is an effective method of communication as it is instantaneous. Information can quickly be disseminated to intended users. However, it is not practical to share extensive pieces of information as it is quickly forgotten. Furthermore, it depends on the user answering the telephone.

Advantages of oral communication	Disadvantages of oral communication
It is cheaper than preparing and copying a letter or report.	Number of participants is limited.
Can be quickly and directly transmitted to the appropriate person.	There is no record of what was said, which can lead to disagreements.
Gives the opportunity for discussion and interaction between the two parties.	Detailed or complicated information is easily forgotten or may not be understood.
The recipient can answer questions so instant feedback is given and agreement can be reached faster than with email or letters.	Time of call may be inconvenient and distractions and interruptions can interfere with the quality of the call.
Can question or ask for additional information if clarification is needed.	Can be time consuming if the caller/recipient miss each other – 'telephone tag'.

Table 7.3 Advantages and disadvantages of oral communication

7.5 Visual communication

Visual communication can be an effective way of communicating complex information to groups of staff.

Pictures, graphs, sound and different formats can be used to effectively engage listeners and sustain their attention.

Examples of visual communication can include:

- posters
- PowerPoint presentations/Prezi presentations ('prezis')
- videos.

Posters

Posters are a growing form of communication within organisations. These are often used to present reports in a more accessible and engaging way, outlining what research was undertaken and summarising the key points and findings.

Although they are more engaging because they are eye catching, posters can often omit key pieces of information, which can render the communication irrelevant.

KEY TERM

Posters – Large notices that can contain written and graphic information.

PowerPoint (and other presentation software)

PowerPoint is an effective method of presenting information to a large audience. Formatting features such as animation and transition, as well as graphics and audio-visual media, can allow a topic to be presented in an engaging way. However, this method depends heavily on ICT working effectively. Furthermore, the formatting features can actually cause more of a distraction to the audience.

Figure 7.5

Advantages of visual communication	Disadvantages of visual communication
Images are easier to remember and can break through a language barrier.	Cannot show exact figures or detailed information so it is only useful for general information.
Can be used to stress certain points or draw attention to important information.	May be difficult to find a good image for the message that needs to be delivered.
Graphs and charts are easier to understand and trends are easier to identify.	Some graphs contain too much information so are confusing.

Table 7.4 Advantages and disadvantages of visual communication

7.6 Electronic communication

Nowadays, using technology to communicate electronically is the most common way of sending and receiving information. It allows the information to be circulated immediately and permits 24/7 communication channels.

Examples of electronic communication can include:

- email
- electronic diary (e-diary)
- instant messaging (IM)
- Virtual Learning Environments (VLEs)
- social networking
- intranet/internet.

Electronic mail (email)

Email is the most common method of communicating electronically. This is when information, files, graphics and media are sent instantly from one computer to another. Both users need to have a valid email address and it can then be used formally or informally to communicate with employees, customers, suppliers and other agencies.

Email is a quick and easy method of communicating with employees, customers and suppliers. However, the intended recipient may not check their inbox in time, which can make the information irrelevant. Files can be attached to emails, leading to a financial saving, avoiding the need for reprographics and postage.

Electronic diary (e-diary)

Electronic diary (e-diary) is a diary and schedule which is stored on a computer. While it includes many of the features of a paper-based diary, such as storage of appointments, personal details and a to-do list, it contains many other features and advantages.

E-diaries are often used to check the availability of other employees within the organisation and to invite participants to meetings. These invitations can include the details of when the meeting is, where it is to be held and how long it will last. This method of communication is usually only used internally among staff. Most email facilities have a built-in e-diary as one of their features.

Instant messaging

Instant messaging (IM) is a way of communicating in real time or instantly. You can send instant messages to anyone who is online at the same time and you can reply immediately to messages sent to you. Two or more people can join in a 'conversation' at the same time. It can be used to have a quick conversation between colleagues working on the same project in different areas of the office.

Examples of IM include:

- Facebook Messenger
- WhatsApp.

Virtual Learning Environments

Virtual Learning Environments (VLEs) require the user to log in to a secure area to access resources and tools to support their learning. Users can either work through the materials at their own pace before submitting for checking and tracking, or they can participate while an individual conducts a live session – communicating through a microphone. This allows users from remote areas or wide geographical areas to access materials that otherwise they could not use. GLOW is an example of a VLE.

Social media

Social media is a way of talking to other people via a computer, allowing the exchange of pictures, information, ideas and opinions. Social media is becoming more popular with businesses as a way to communicate with existing and potential customers.

The nature of the information will affect which social media platform the organisation will use. For example:

- an organisation would use Facebook to advertise and promote a new product or service
- an organisation would use LinkedIn to raise awareness of a new vacancy.

A discussion group is an online forum for individuals to discuss topics of interest. Individuals post their comments which others can read and then respond to. It is an informal and voluntary way to exchange ideas and information and keeps people up to date on topics of interest. However, caution should be used, as anyone can post on these forums, so not all content is reliable and accurate.

Advantages of electronic communication	Disadvantages of electronic communication
Possible to communicate by electronic means 24/7 and 365 days of the year.	Technical issues mean the message may be lost or not sent.
Information can now be sent instantaneously.	May be seen as less formal or professional by recipient.
The cost of sending information electronically has fallen greatly.	Both parties need to have access to the same equipment/ software.

Table 7.5 Advantages and disadvantages of electronic communication

STUDY TIP

Compare (discuss similarities or differences of) verbal and written communication (see Table 7.6).

Both written and verbal communication can convey large amounts of detailed information.		
Written communication allows for a permanent record to be referred to later	whereas	verbal communication provides instant information with no lasting record.
Written communication provides a specific and fixed amount of detail	whereas	verbal communication allows instant checking of details and requests for additional information.
Verbal communication allows for immediate feedback	whereas	there can be a time delay in response to written communication.

Table 7.6 A comparison of written and verbal communication

7.7 Barriers to communication

Good communication is essential to work effectively. Difficulties often occur because of faults or barriers in the communication process. The main barriers to communication are discussed below:

- **Distortion**: This is where the message is not accurately stated due to inappropriate language, typing errors or unclear explanations.
- **Noise**: This could come in the form of physical noise such as traffic or roadworks or technical noise such as a bad connection or faulty line.
- **Differences in perception**: Often people of different ages, cultures, education and personality interpret situations differently.
- **Jumping to conclusions**: Hearing and seeing what you expect – you can miss the actual message.
- **Lack of interest**: If the sender does not relay the message in the best way, the receiver might not engage with the communication.
- **Information overload**: Too much information can make the recipient tired and confused.
- **Bias and selectivity**: If you only receive part of the message, you might choose to filter out the rest.
- **Lack of feedback**: If a message is sent and there is no response or feedback you cannot be sure that the message has been received or understood.

Impact of poor communication:

- Employees may become demotivated, leading to higher rates of absenteeism.
- Employees may not understand the task and therefore waste time, leading to low productivity.
- Deadlines may be missed, which could result in reduced sales/profits.
- Employees may wrongly inform customers, which leads to an increase in complaints.
- Poor customer service can damage the image of the firm.
- Breakdown in relationships between manager and staff, causing negativity in the workplace/high staff turnover, leading to increased costs in recruitment and training/impact on customers.

Figure 7.6

WHAT YOU NEED TO KNOW

1	The different communication methods available.	✓
2	Using digital technology to communicate.	✓
3	The audience of your communication.	✓
4	Barriers to effective communication.	✓

STUDY ACTIVITIES FOR THIS OUTCOME

- Make a list of all the different methods of communication and describe how you would use them and what their advantages and disadvantages are.
- Describe how and why you would use them.
- Think of the benefits and consequences of these methods of communication.

CASE STUDY

McDade Confectionery is a large manufacturer and retailer of chocolates, sweets and biscuits based in Kirkcaldy, Fife. Jack, the Managing Director, gave a presentation to all 500 members of his staff today. The presentation was scheduled to take place at 10 a.m. in the auditorium. However, 30 members of staff arrived 30 minutes late to the presentation because they had been told the wrong time. The purpose of the presentation was to provide training and strategies in improving the declining sales performance of the organisation. Jack insisted all staff were present as it was a whole organisational issue. However, staff in departments such as Operations and Human Resources could not see the relevance to them as they do not deal with customers and quickly became bored due to a lack of understanding.

Midway through the presentation, Jack became agitated as he could hear the sound of mobile phones sending and receiving messages from the back of the room. Jack had asked his Administrative Assistant, Olivia, to prepare PowerPoint slides for him to present, but the writing was so small it could not be read by some staff in the rows at the back. The presentation lasted an hour and a half and Olivia had crammed a lot of policies, research and procedures into the slides. Older and experienced members of staff felt that they were being 'told off' by Jack for not meeting sales targets, while newer members of staff felt discouraged by what he had to say. Towards the end of the presentation, loud drilling from roadworks outside could be heard. A member of the Finance Department closed the windows but that made the temperature of the room uncomfortably hot. Once Jack had finished talking, he immediately returned to his office and did not engage with any staff, still feeling annoyed about the use of mobile phones.

Q1	**Describe** the following methods of communication: (2) ● written ● visual.	Building
Q2	**Identify** the barriers to communication which affected the quality of communication at the presentation. (8)	Building
Q3	**Describe** solutions to each barrier to communication identified above. (8)	*Strengthening*
Q4	**Explain** the consequences of ineffective communication to an organisation. (4)	**Extending**
Q5	**Discuss** the advantages and disadvantages of face-to-face communication. (4)	**Extending**
Q6	**Explain** the advantages of electronic communication. (4)	**Extending**

Unit 2

Application of IT

Chapter 8 Spreadsheets

Introduction and formatting

Figure 8.1 Microsoft Excel logo

Microsoft Excel is software used to generate spreadsheets. Spreadsheets are used to gather, collate, analyse and manipulate **quantitative** data – providing figures or statistics. Data can also be displayed in graph or chart form using the functions of a spreadsheet.

Each individual spreadsheet file is referred to as a **workbook**. Each workbook is made up of multiple **worksheets**, which can be navigated through the tabs at the bottom of the window.

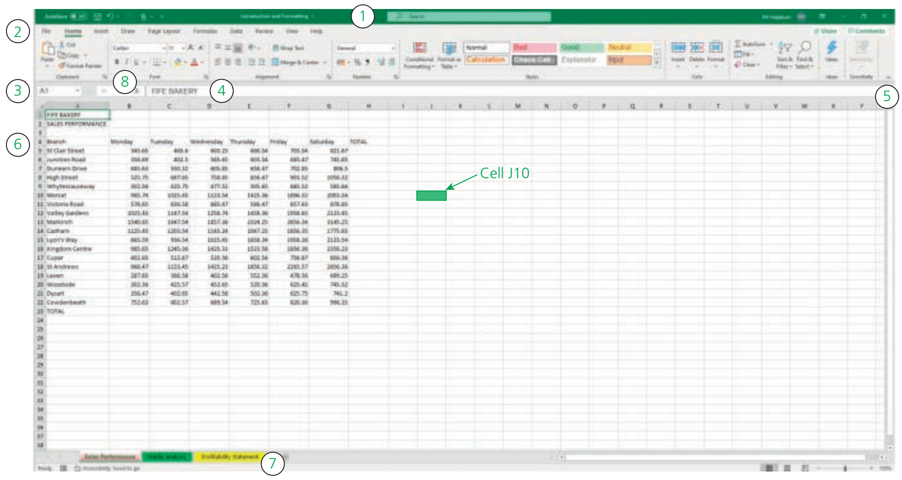


Figure 8.2

Number	Feature	Description
1	Quick access toolbar	Allows you to select basic commands in the software, such as save or undo. This can be customised to your preference.
2	Home ribbon	Contains all of the commands needed to analyse and format your spreadsheet. Varies depending on the tab selected.
3	Name box	Displays the name of the selected cell. This can be either a relative cell reference (e.g. A1) or the name issued to the cell.
4	Formula bar	Allows you to enter or edit the formula or function of a selected cell to return a given answer.
5	Column headings	Columns run vertically down the page. Each column is identified through the letter indicated at the top (e.g. A).
6	Row headings	Rows run horizontally across the page. Each row is identified through the number indicated at the left (e.g. 1).
7	Worksheets/tabs	Selecting these tabs allows you to navigate through the different worksheets which make up the workbook.
8	Function palette	Selecting this icon allows you to choose from a variety of functions that are built in to Excel to perform calculations.

Table 8.1 Features of Excel

All cells have a unique cell reference made up from the column letter and row number of the sheet. This is referred to as **relative cell referencing**.

Comments/notes

Comments (or notes in newer versions) are a feature which allows the user to add additional information to the spreadsheet which may provide context to the data or instructions for the user. Comments/notes are shown as a red marker in the top right-hand corner of the cell and are contained within yellow boxes. To read the comment/note, hover over the cell and the yellow box will appear.

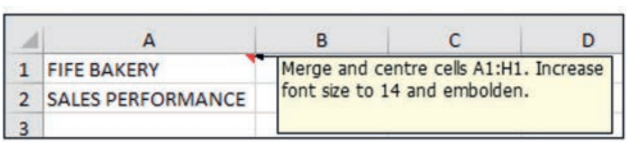


Figure 8.3

EXAM TIP

Always select 'Show all comments/notes' before starting a spreadsheet question to see all instructions.

Comments which provide **instructions** to candidates on how to complete a spreadsheet should be dealt with in three simple steps:

Read → Action → Delete

Comments which provide context or further notes on the content of the spreadsheet may be kept. These can either be printed as they are or displayed at the end of the worksheet.

Formatting spreadsheets

Spreadsheets can be formatted or enhanced using the features located under the Home ribbon.

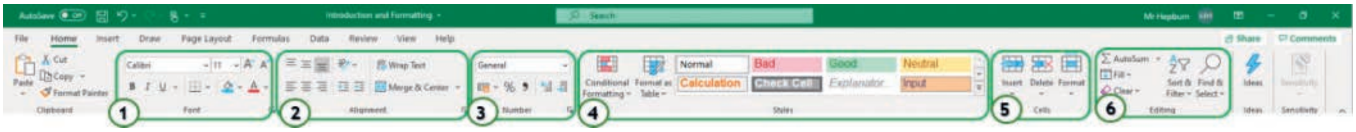


Figure 8.4

1 Font	2 Alignment	3 Number
These options make changes to the appearance of text and cells selected. This can include: • change the font • change font size • apply styles/enhancements • apply cell borders • shade/fill cells.	These options make changes to the location of the text within cells. This can include: • alignment (left, centre, right) • text direction • increase/decrease indent • wrap text • merge and centre cells.	These options format the figures contained within cells to reflect their content/purpose, such as: • number • currency • date • percentage • time.
4 Styles	**5 Cells**	**6 Editing**
These options enhance the appearance of cells, based on their content, such as: • table format • number format • styles gallery • conditional formatting • titles and headings.	These options allow changes to be made to the structure and layout of the worksheet, including: • inserting rows/columns • deleting rows/columns • amending row height • amending column width • hiding rows/columns.	These options allow the content of the spreadsheet to be edited or analysed, including: • AutoSum/functions • fill/flash fill • sorting • filtering • find and replace.

Table 8.2 Formatting spreadsheets

Before printing a spreadsheet, **proofread** it first to check for errors or unactioned comments. If text cannot be read within a cell or has been replaced with hash tags (###), it means the cell is **truncated**. This can be fixed by increasing the column width to show all text by double clicking between the column heading.

EXAM TIP

The question does not always state which 'number format' cells should be. Check their contents before printing.

Formulae and basic functions

The biggest advantage of using spreadsheets in organisations is that **calculations** can be completed quickly and with 100 per cent accuracy. These are completed using formulae and functions.

Formulae	Functions
These are the mathematical operators used to perform calculations in Excel. They include: • Addition (+) • Subtraction (-) • Multiplication (*) • Division (/)	• These are the built-in operations which are programmed within Microsoft Excel. • These allow calculations to be performed instantly and calculations to be completed accurately while analysing and interpreting the data within the spreadsheet. • The use of the functions bar is required to undertake the majority of these functions – particularly at Higher level.

* Note the difference in symbols for multiplication and division.

Table 8.3 Formulae and functions

All formulae and functions begin with an **equals sign** (=). This indicates to Excel that you want it to perform a calculation. When performing arithmetical formulae, make sure you use **brackets** to break up multiple operations. For example, multiplication and addition =((B4+C4)*D4)+((B5+C5)*D5).

TOP TIP

Always click a cell when using it in formulae or functions. This means the calculation will update if the cell contents change.

Functions and formulae can be copied down into neighbouring cells by dragging down the green handle from the right-hand corner of the cell. This is referred to as **replication**. Cells will automatically update to reflect the different cell contents.

However, sometimes a cell will require to be '**locked in**' so that it is used in each calculation after replication. We do not want this cell to change when we replicate it down, so an **absolute cell reference** needs to be used. This is done by pushing 'F4' on the keyboard after the cell that is to be absolute cell referenced. Dollar signs ($) should then appear around this cell reference, locking it in for replication.

MIN

Returns the lowest value within a given range.

AVERAGE

Returns the average from values within a given range.

MAX

Returns the highest value within a given range.

SUM

Totals the values of cell contents from within a given range.

COUNT

Counts the number of cells within a given range that contain numerical data.

COUNTBLANK

Counts the number of cells within a given range that are empty.

COUNTA

Counts the number of cells within a given range that contain text.

Figure 8.5 Cell functions and formulae

Named cells and named ranges

Cells have a unique reference based on the column and row they belong to – referred to as relative cell referencing. However, there are some cells which may be used regularly in calculations which would make more sense to be given a 'name' to provide context to the calculation.

	A	B	C	D	E	F
1	Fife IT Solutions					
2						
3	Quantity	Product	Price	VAT	Delivery	Total
4	5	Blank Ink Cartridge	£8.50			
5	3	Colour Ink Cartridge	£11.50			
6	2	Wireless Mouse	£15.00			
7	1	USB Stick - 64GB	£10.00			
8						
9						
10	Delivery Cost	2%				
11	VAT	20%				

Figure 8.6

Digital resources, consisting of practice tasks and a practice assignment, are available at **www.hoddergibson.co.uk/higher-admin-tasks**

In the example shown, both 'Delivery Cost' and 'VAT' are percentages which need to be multiplied by the price to find the value. These cells could be absolute (F4) or named, which is an example of absolute cell referencing.

Step One: Select cell 'B10' which contains the Delivery Cost percentage. Go up to the 'Name Box' and remove the name 'B10'.

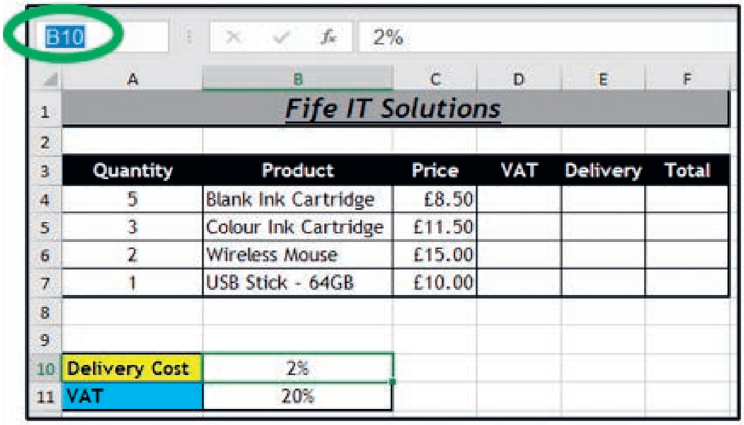


Figure 8.7

Step Two: Key in the new name for the cell. It should be meaningful and relevant. Ensure spelling is correct and with accurate capitalisation. Spaces cannot be used in the name, so use the underscore (_) if required. Hit return once complete. Your cell has now been renamed successfully and can be used in formulae, for example, =C4*Delivery_Cost.

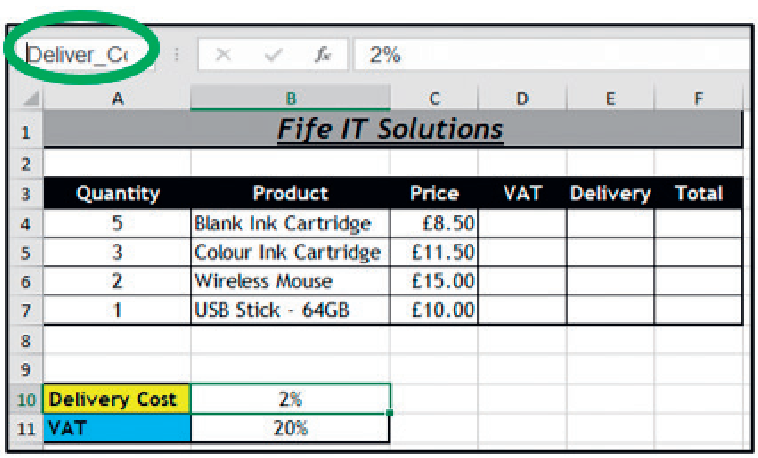


Figure 8.8

Named ranges can be used to name multiple cells within the same area with the same name. The same steps as above would apply, just with more cells selected. These are particularly useful when preparing V and H Lookups (which are dealt with later).

To change or amend a named cell/named range you need to select the 'Formulas' ribbon and then select 'Name Manager'. Once here, the named cells or range can be renamed, or additional cells/ranges named (Figure 8.9).

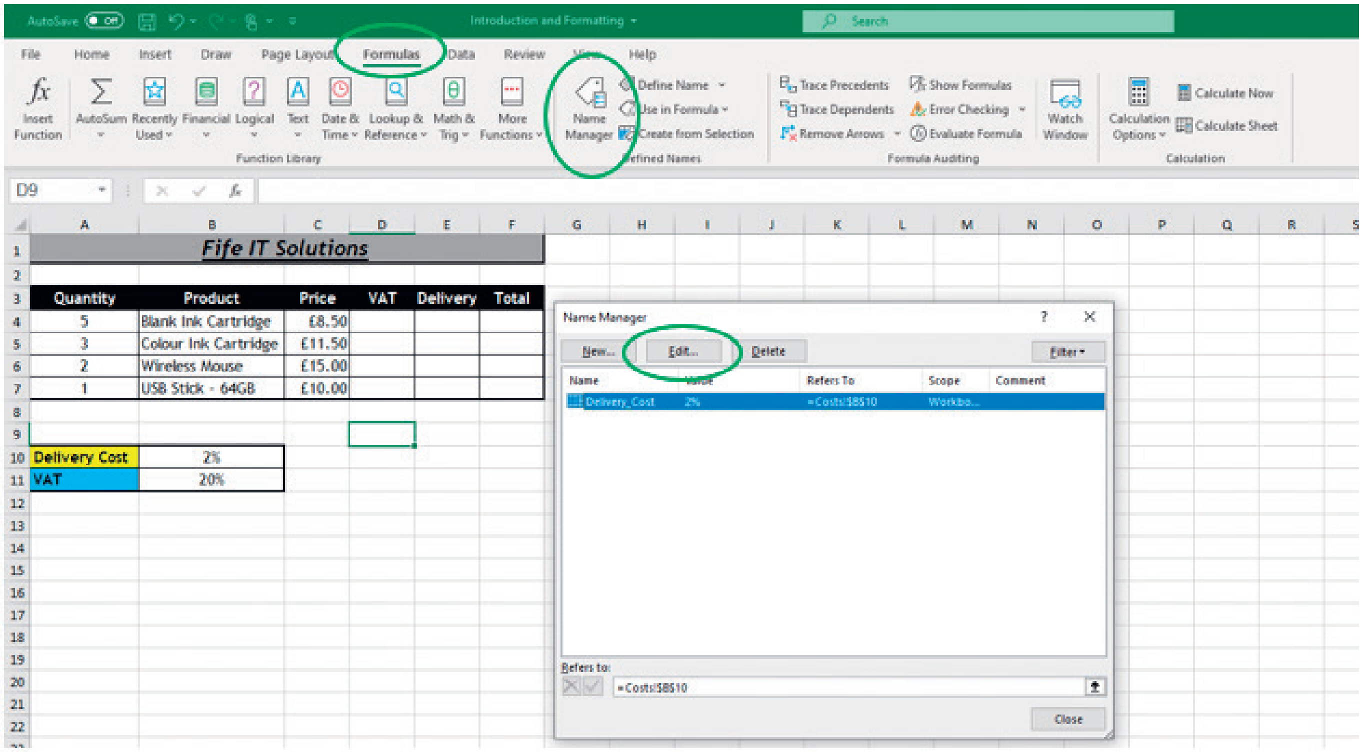


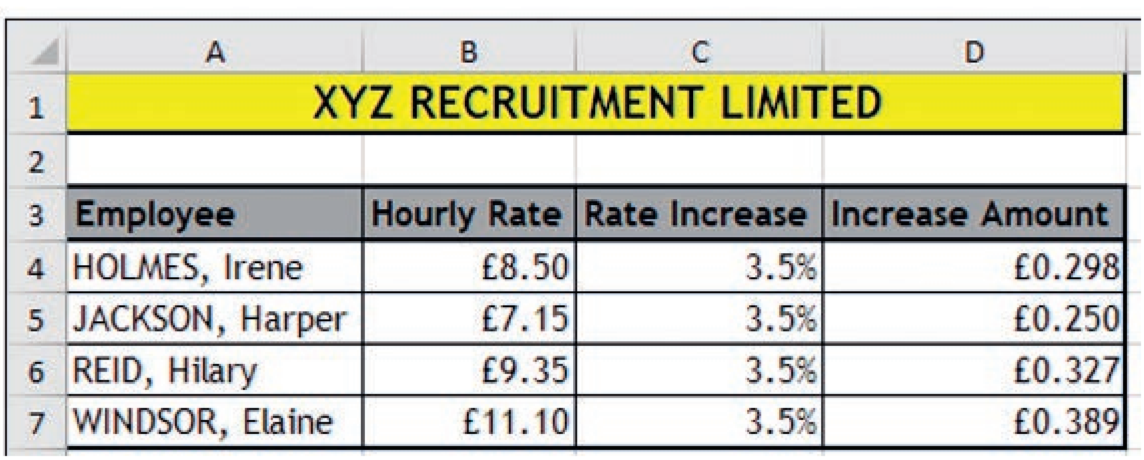
Figure 8.9

Round functions (up and down)

When asked to 'round' a number or solution in the Assignment for Higher Administration and IT, you are expected to use a **function**, not simply to format the cell to the nearest whole number.

ROUND	ROUNDDOWN	ROUNDUP
Will round a number to a specified number of digits.	Will round a number down towards 0.	Will round a number up away from 0.

Table 8.4 Round functions



	A	B	C	D
1	XYZ RECRUITMENT LIMITED			
2				
3	Employee	Hourly Rate	Rate Increase	Increase Amount
4	HOLMES, Irene	£8.50	3.5%	£0.298
5	JACKSON, Harper	£7.15	3.5%	£0.250
6	REID, Hilary	£9.35	3.5%	£0.327
7	WINDSOR, Elaine	£11.10	3.5%	£0.389

Figure 8.10

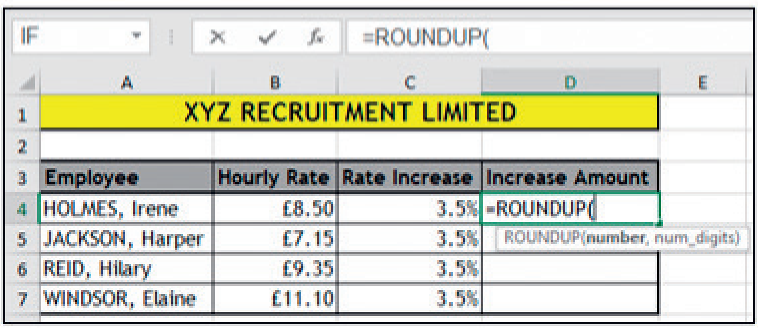
Digital resources, consisting of practice tasks and a practice assignment, are available at **www.hoddergibson.co.uk/higher-admin-tasks**

In this example, all employees are getting a pay rise of 3.5%. We are to calculate the increase amount.

The increase amount is not a practical figure, so it should be rounded to either 1 or 2 decimal places.

The choice of 'Round' function used will depend on what the question has asked for. The steps below can be used interchangeably for =ROUND, =ROUNDDOWN and =ROUNDUP.

Step One: In cell D4, key in '=ROUNDUP(' and the functions palette (fx).



IF | =ROUNDUP(

	A	B	C	D	E
1	XYZ RECRUITMENT LIMITED				
2					
3	Employee	Hourly Rate	Rate Increase	Increase Amount	
4	HOLMES, Irene	£8.50	3.5%	=ROUNDUP(	
5	JACKSON, Harper	£7.15	3.5%	ROUNDUP(number, num_digits)	
6	REID, Hilary	£9.35	3.5%		
7	WINDSOR, Elaine	£11.10	3.5%		

Figure 8.11

Step Two: The function is made up of two parts. 'Number' is either the digits or calculation you want to round. 'Num_digits' is how many figures/decimal places you want to round to. For 'Number', enter the formula needed to return the answer 'B4*C4'. In 'Num-digits' key in '1' so the answer is rounded to 1 decimal place. Click 'OK'.

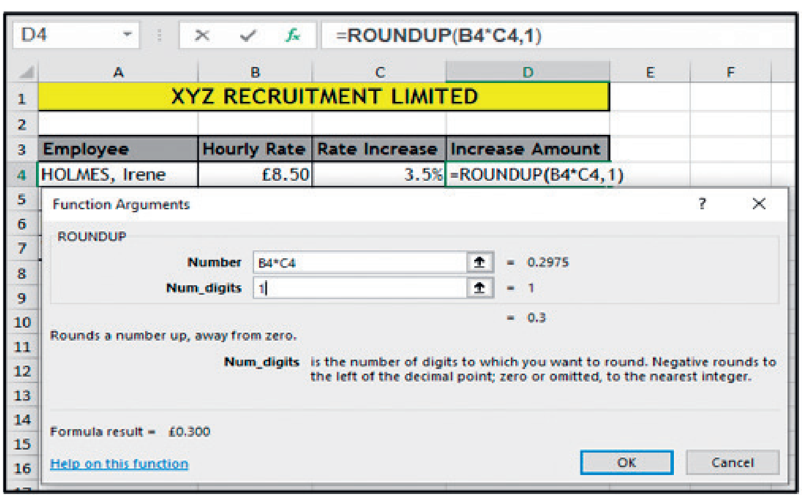
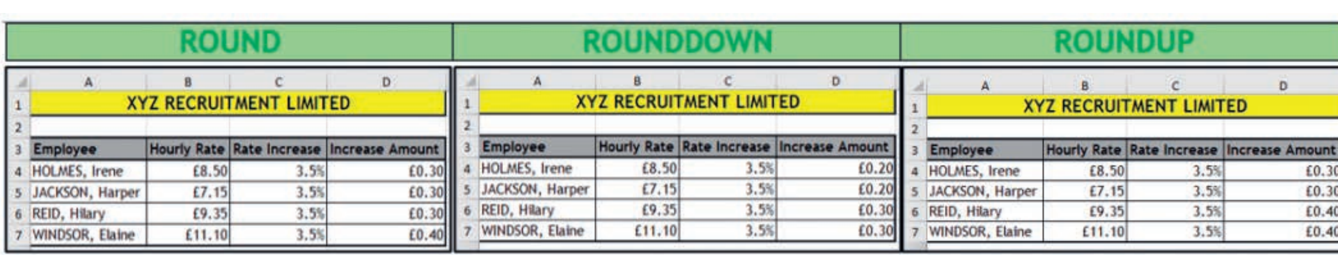


Figure 8.12



ROUND

	A	B	C	D
1	XYZ RECRUITMENT LIMITED			
2				
3	Employee	Hourly Rate	Rate Increase	Increase Amount
4	HOLMES, Irene	£8.50	3.5%	£0.30
5	JACKSON, Harper	£7.15	3.5%	£0.30
6	REID, Hilary	£9.35	3.5%	£0.30
7	WINDSOR, Elaine	£11.10	3.5%	£0.40

ROUNDDOWN

	A	B	C	D
1	XYZ RECRUITMENT LIMITED			
2				
3	Employee	Hourly Rate	Rate Increase	Increase Amount
4	HOLMES, Irene	£8.50	3.5%	£0.20
5	JACKSON, Harper	£7.15	3.5%	£0.20
6	REID, Hilary	£9.35	3.5%	£0.30
7	WINDSOR, Elaine	£11.10	3.5%	£0.30

ROUNDUP

	A	B	C	D
1	XYZ RECRUITMENT LIMITED			
2				
3	Employee	Hourly Rate	Rate Increase	Increase Amount
4	HOLMES, Irene	£8.50	3.5%	£0.30
5	JACKSON, Harper	£7.15	3.5%	£0.30
6	REID, Hilary	£9.35	3.5%	£0.40
7	WINDSOR, Elaine	£11.10	3.5%	£0.40

Figure 8.13

Note the differences in the answer to each. This is why it is important to read the comments/instructions carefully to ensure you are using the correct round function.

Conditional formatting

Conditional formatting allows cells to have a **specific format** applied to them automatically depending on their cell value.

This happens once a **conditional formatting rule** has been applied.

	A	B	C	D
1	BRANCH SALES PERFORMANCE			
2	Branch	Week 1	Week 2	Week 3
3	Markinch	£14,568.35	£15,445.36	£15,223.54
4	Junction	£11,365.47	£10,563.47	£9,897.56
5	Dunearn	£7,885.56	£8,556.35	£9,658.25
6	Mercat	£11,350.45	£9,669.85	£10,475.54
7	Whytescauseway	£9,563.47	£9,663.47	£9,236.45
8	Kingdom Centre	£14,500.00	£13,556.34	£12,478.57

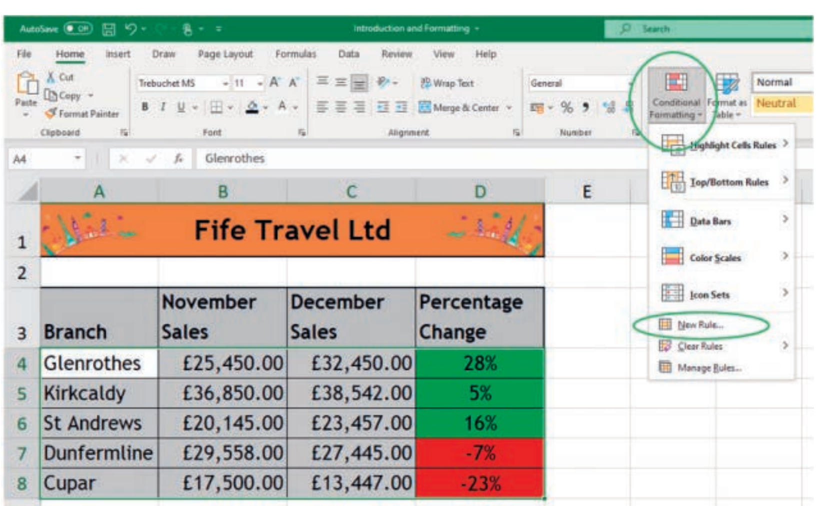
Figure 8.14

Formatting can include:

- shading cells
- formatted font (bold/italics/underline)
- increasing font size
- changing font
- application of borders.

This then allows data to be more easily interpreted and analysed. It can also allow for **anomalies** or outliers to be easily identified.

Step One: Fife Travel Ltd want to easily identify which branches have decreased their sales revenue and which have increased it. Increases are to be shaded green, while decreases are to be shaded red. Select the cells in the range to conditionally format, D4:D8. Select the drop-down at 'Conditional Formatting' and select 'New Rule'.



	A	B	C	D
3	Branch	November Sales	December Sales	Percentage Change
4	Glenrothes	£25,450.00	£32,450.00	28%
5	Kirkcaldy	£36,850.00	£38,542.00	5%
6	St Andrews	£20,145.00	£23,457.00	16%
7	Dunfermline	£29,558.00	£27,445.00	-7%
8	Cupar	£17,500.00	£13,447.00	-23%

Figure 8.15

Step Two: Select 'Format only cells that contain'. In the second drop-down option, select 'greater than' and key in 0%. Then select 'Format'.

Digital resources, consisting of practice tasks and a practice assignment, are available at **www.hoddergibson.co.uk/higher-admin-tasks**

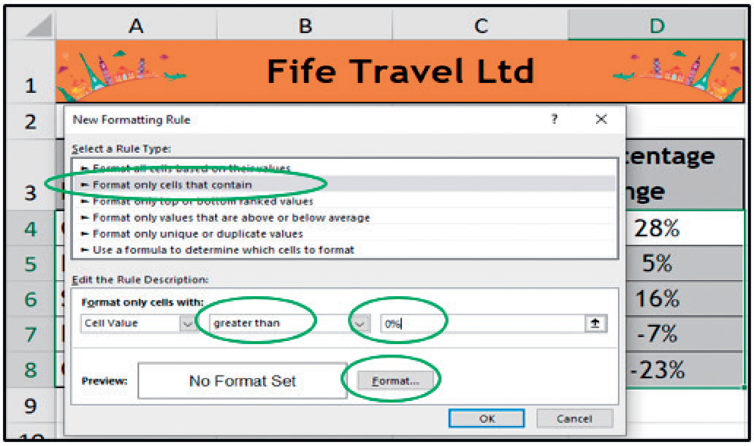


Figure 8.16

Step Three: Select 'Fill' and then an appropriate shade of green. Select 'OK'. Select 'OK' again on the 'New Formatting Rule' pane and your spreadsheet should now have the cells which are greater than 0% shaded green.

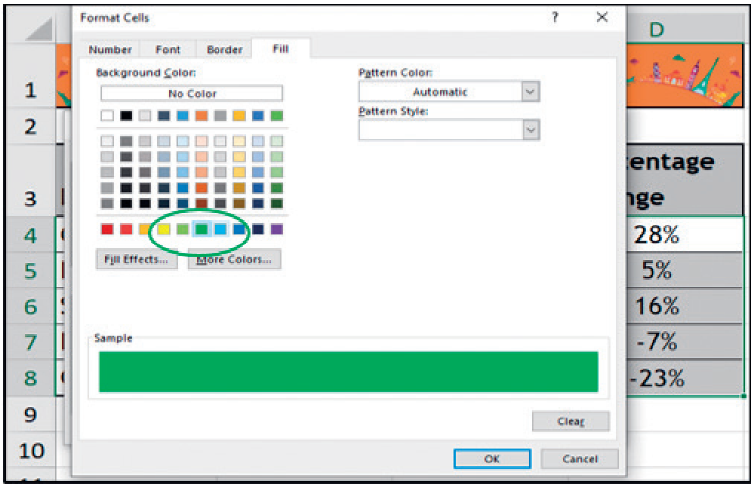


Figure 8.17

Step Four: Repeat these steps but set the rule so that those cells which are less than or equal to 0% are shaded red. The completed file is shown, clearly identifying those that have seen an increase (green) and those with a decrease (red).

	A	B	C	D
1	Fife Travel Ltd			
2				
3	Branch	November Sales	December Sales	Percentage Change
4	Glenrothes	£25,450.00	£32,450.00	28%
5	Kirkcaldy	£36,850.00	£38,542.00	5%
6	St Andrews	£20,145.00	£23,457.00	16%
7	Dunfermline	£29,558.00	£27,445.00	-7%
8	Cupar	£17,500.00	£13,447.00	-23%

Figure 8.18

Sorting and filtering

Often the data contained within a spreadsheet is meaningless because it is not presented in an ordered fashion.

Figure 8.19

The data may need to be arranged into a particular order to make it more meaningful and easier to work with.

There are three methods of sorting data within a spreadsheet.

Sort	Ascending	Descending
Alphabetically Sort A to Z Sort Z to A	Anna Benjamin Daniel Emma	Emma Daniel Benjamin Anna
Chronologically Sort Oldest to Newest Sort Newest to Oldest	01 / 01 / 2000 01 / 01 / 2001 01 / 01 / 2003 01 / 01 / 2004	01 / 01 / 2004 01 / 01 / 2003 01 / 01 / 2001 01 / 01 / 2000
Numerically Sort Smallest to Largest Sort Largest to Smallest	£5.00 £6.00 £8.00 £9.00	£9.00 £8.00 £6.00 £5.00

Table 8.5 Sorting data

TOP TIP

Always use 'Custom Sort' when sorting data to avoid data mismatches. This occurs when only one column has been sorted and the additional data does not move with the sorted column.

EXAM TIP

Questions typically ask for sorting to occur on two to three fields.

Step One: The table in Figure 8.20 is to be sorted alphabetically by Branch and then by Employee name. Highlight the entire table (including header) and select 'Sort & Filter' and then 'Custom Sort'.

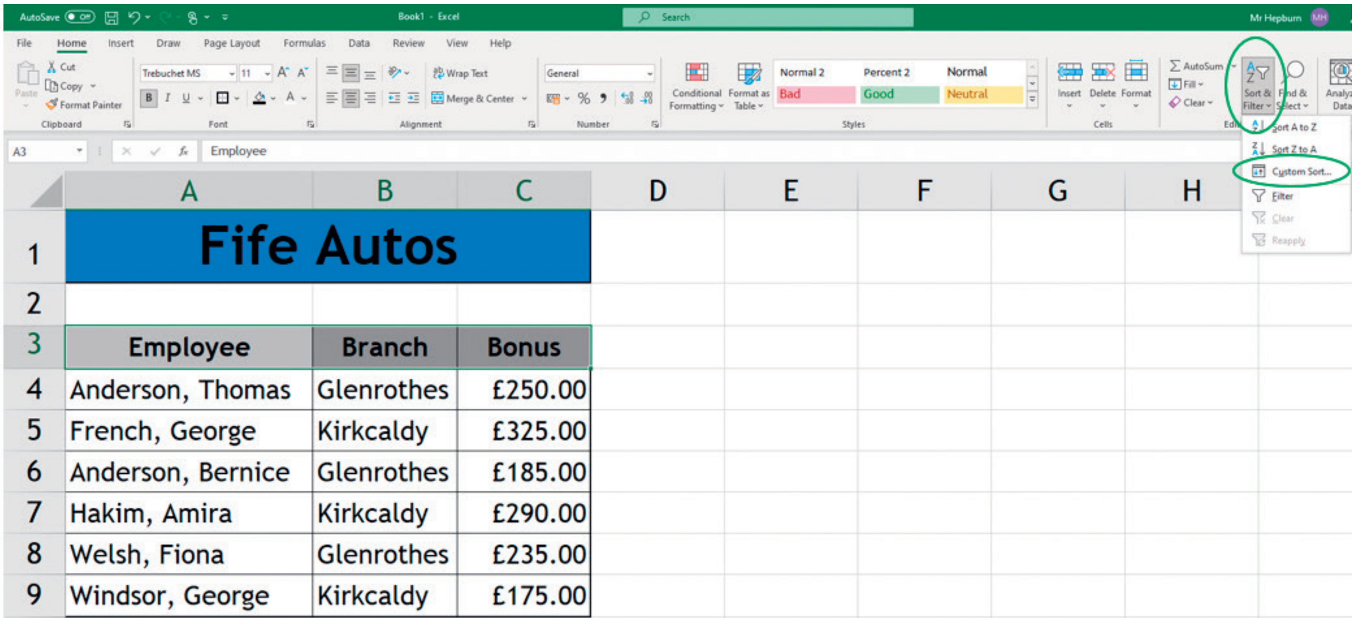


Figure 8.20

Step Two: The following dialogue box will appear. Make sure you tick 'My data has headers'. Select 'Branch' at the first drop-down box and ensure it is ordered 'A to Z'. Select 'Add Level'.

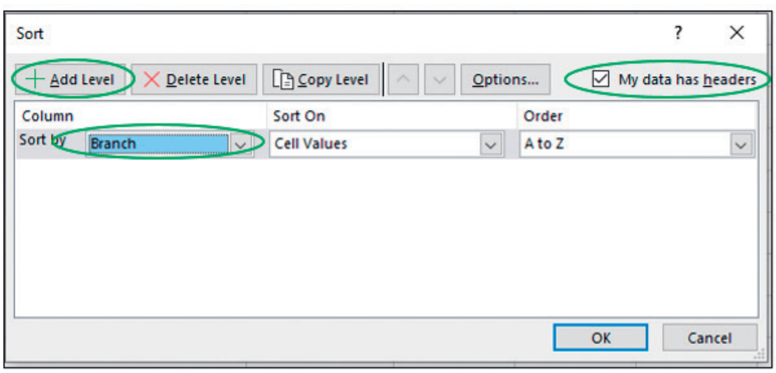


Figure 8.21

Step Three: Select 'Employee' at the second drop-down box. Select 'OK' and the table has now been sorted on two fields.

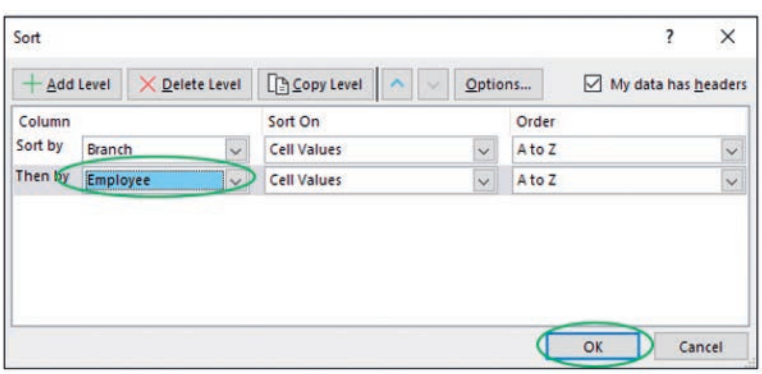


Figure 8.22

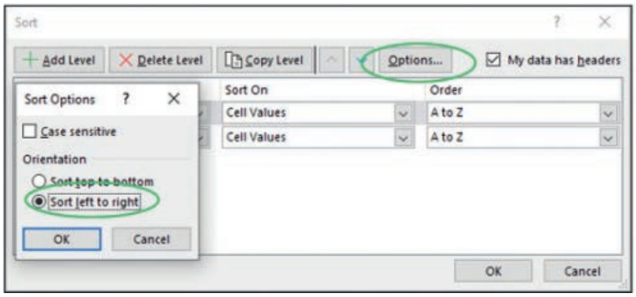


Figure 8.23

To sort data horizontally, open the 'Custom Sort' option. Select 'Options' and then 'Sort left to right'. You can then sort the data accordingly (Figure 8.23).

	A	B	C
1	Fife Autos		
2			
3	Employee	Branch	Bonus
4	Anderson, Bernice	Glenrothes	£185.00
5	Anderson, Thomas	Glenrothes	£250.00
6	Welsh, Fiona	Glenrothes	£235.00
7	French, George	Kirkcaldy	£325.00
8	Hakim, Amira	Kirkcaldy	£290.00
9	Windsor, George	Kirkcaldy	£175.00

Figure 8.24

On occasion, some data contained within a spreadsheet is **irrelevant** to what is being analysed and should not be shown.

Deleting the information is not appropriate, as it may be required for another purpose or at a later date.

Filtering can be applied to each column within a spreadsheet, allowing the user to display only selected data which is meaningful for their purpose.

Step One: Select the row headings for the table that requires filtering. Go to 'Sort & Filter' and select 'Filter'. Drop-down filter options will then appear at each heading.

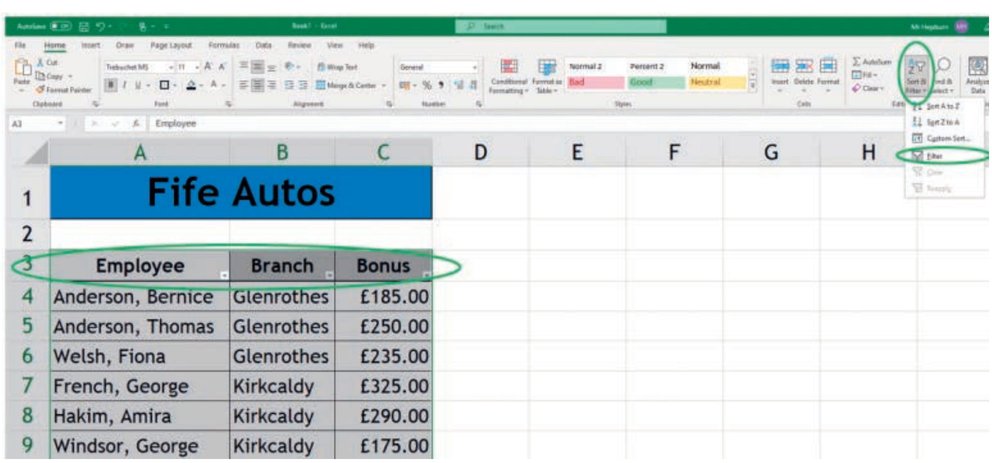


Figure 8.25

Step Two: To show only those who work in Glenrothes, select the drop-down filter at 'Branch'. Deselect 'Select All' and tick 'Glenrothes'. Select 'OK'. This will only show Glenrothes staff.

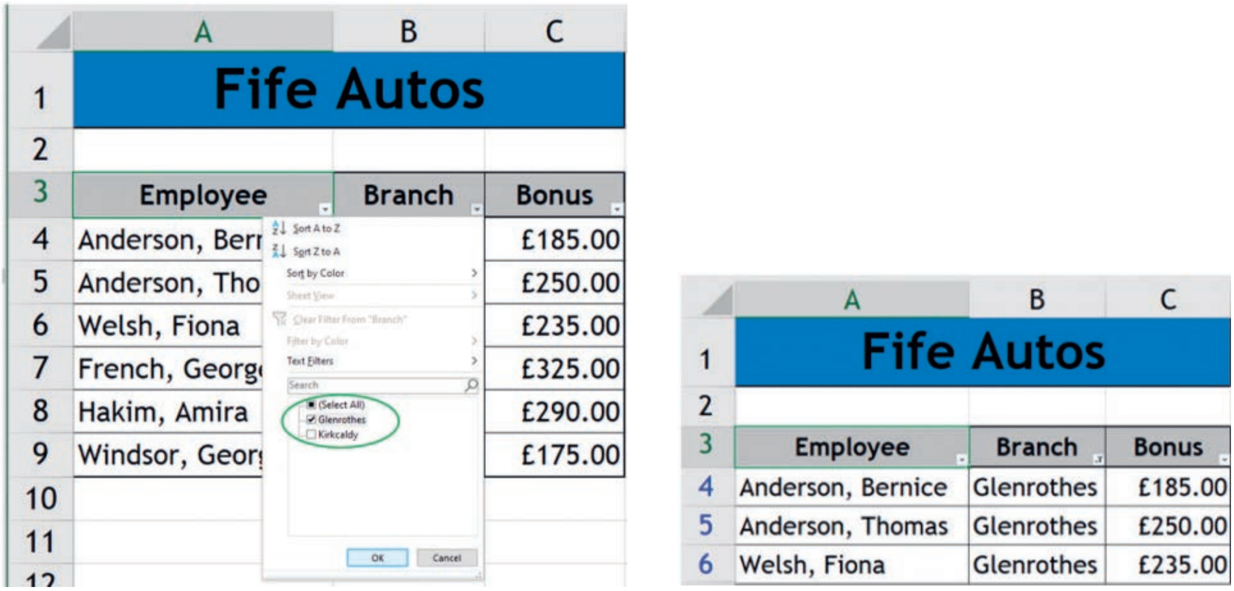


Figure 8.26

To clear a filter/filters, you simply need to select the 'Clear Filters' option for all fields that have been filtered.

Figure 8.27

Questions at Higher level may ask you to filter data contained within a spreadsheet on multiple criteria. For example, it may ask you to only display dates between a range or to only show figures which are above or below a specified rate. These are examples of advanced filters:

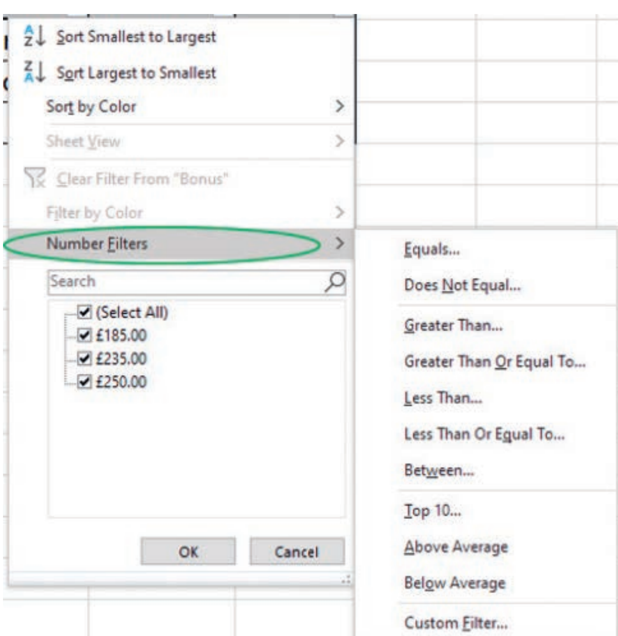


Figure 8.28

Advanced filters can be set up by selecting 'Number Filters' and selecting the correct criteria.

IF statements

Often in spreadsheets, the entry or calculations displayed within a cell will depend on other information.

We can instruct the spreadsheet to make decisions for us based on criteria that we set. These are referred to as **IF statements**.

IF something is true, display Value X, if it is false display Value Y.

The IF function can be used to display one of two results, depending on whether a statement is true or false.

For example, if a student gets 50% or more (true) then they have 'Passed', if they do not (false) they have 'Failed'.

IF statements can be used to:

- return text to the cell
- return values to the cell
- perform a calculation in the cell.

IF statements are made up of four components:

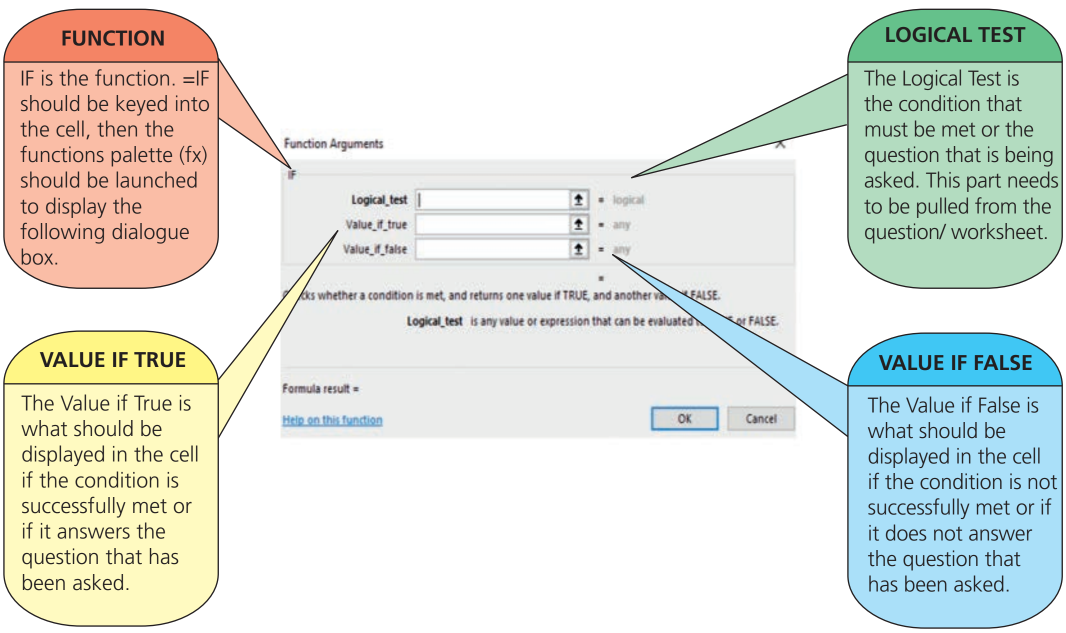


Figure 8.29 Components of IF statements

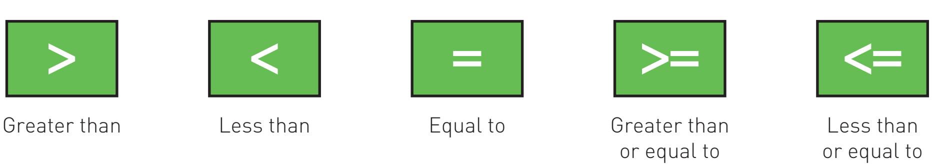


Figure 8.30

Digital resources, consisting of practice tasks and a practice assignment, are available at **www.hoddergibson.co.uk/higher-admin-tasks**

IF statements – worked example

	A	B	C	D	E
1	Customer Discounts				
2	Customer	Branch	Cost	Discount Rate	Revised Cost
3	Wylie	Glenrothes	£550.00		
4	Henderson	Kirkcaldy	£600.00		
5	Branning	Kirkcaldy	£400.00		
6	Carter	Glenrothes	£850.00		
7	Hobbs	Glenrothes	£350.00		
8	Grey	Kirkcaldy	£700.00		
9	Black	Kirkcaldy	£850.00		
10	Walford	Glenrothes	£740.00		
11					
12	Discount Rate				
13	Glenrothes	8%			
14	Kirkcaldy	10%			

Figure 8.31

If customers order in Kirkcaldy, they receive a 10% discount, otherwise they receive an 8% discount.

We want to calculate the 'Discount Rate' in Column D which varies depending if the order was placed in the Kirkcaldy branch or the Glenrothes branch.

Step One: In cell D3, key in '=IF('. Launch the function palette (fx) so the dialogue box appears.

Step Two: Assemble the IF statement by completing the 'Function Arguments' dialogue box.

The Logical Test: IF the branch is Kirkcaldy

Value IF True: 10%

Value IF False: 8%

This would look like:

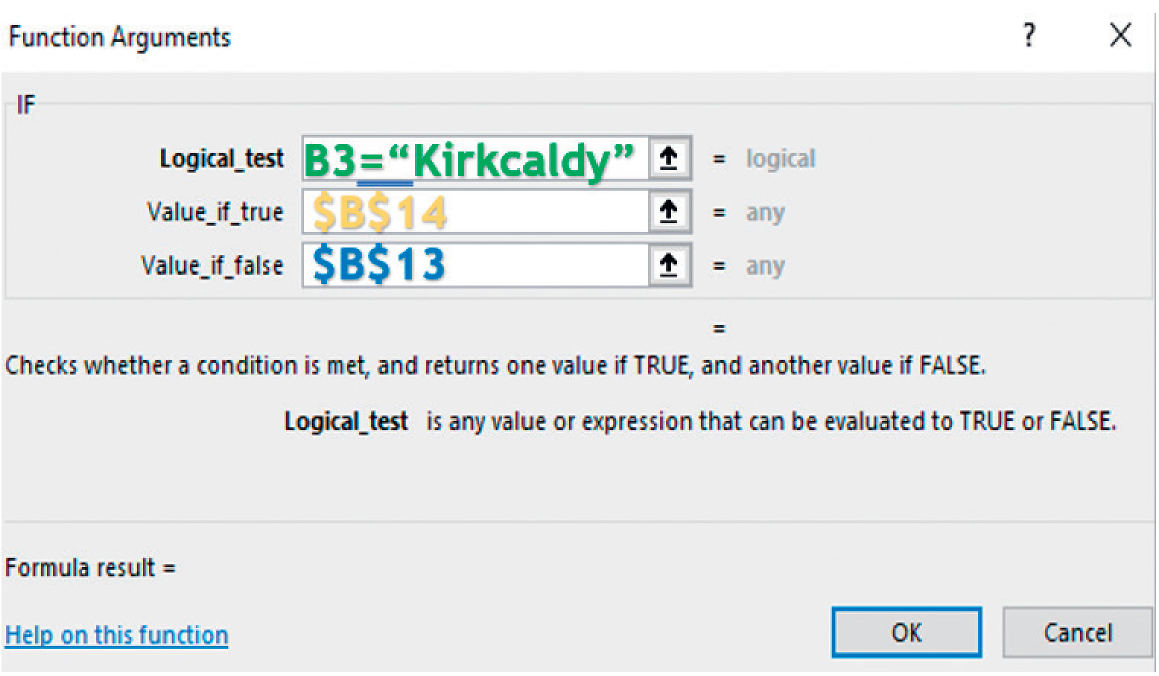


Figure 8.32

TOP TIP

- Remember to use an absolute cell reference (F4) for cells that need to be locked in before replication.
- When text is used in the IF statement, it should be placed in "speech marks".

Step Three: Click 'OK'. Your results should look like Figure 8.33.

	A	B	C	D	E
1	Customer Discounts				
2	Customer	Branch	Cost	Discount Rate	Revised Cost
3	Wylie	Glenrothes	£550.00		
4	Henderson	Kirkcaldy	£600.00		
5	Branning	Kirkcaldy	£400.00		
6	Carter	Glenrothes	£850.00		
7	Hobbs	Glenrothes	£350.00		
8	Grey	Kirkcaldy	£700.00		
9	Black	Kirkcaldy	£850.00		
10	Walford	Glenrothes	£740.00		
11					
12	Discount Rate				
13	Glenrothes	8%			
14	Kirkcaldy	10%			

Figure 8.33

TOP TIP

Proofread your spreadsheet before printing to check all cells are formatted correctly.

Nested IF statements

IF statements are used when there is a choice between two options, or conditions, like the previous example. However, in the majority of instances at Higher level there will be **multiple conditions** to be checked (usually three or four).

This means that the first condition will need to be checked, then the second and then the third, and if none of those are satisfied it must be the fourth condition. This is referred to as a **nested IF statement** (sometimes referred to as complex or multiple), as there will be multiple IF statements within one another.

Nested IF statements – worked example

	A	B	C
1	MUTY MOTORS		
2			
3	Sales Executive	Sales Generated	Bonus Amount
4	MACKAY, Lorraine	£32,000.00	
5	MCMILLAN, Alan	£42,000.00	
6	MCQUADE, Lorraine	£21,000.00	
7	ROY, Julie	£25,000.00	
8	SANDILANDS, Jennifer	£18,000.00	
9	VALENTINE, Susan	£26,000.00	
10			
11	Bonus Information		
12	>£40,000	12%	
13	>£30,000	8%	
14	<=£30,000	4%	

Figure 8.34

The spreadsheet above records the sales revenue generated from Sales Executives working at Muty Motors. They receive a bonus which is a percentage of the sales they have generated. The percentage varies depending on the value of their sales.

There are three conditions which need to be checked:

- Are sales greater than £40,000?
- Are sales greater than £30,000?
- Sales must be less than or equal to £30,000.

Step One: In cell C4, key in '=IF('. Launch the function palette (fx) so the dialogue box appears.

Step Two: Assemble the IF statement by completing the 'Function Arguments' dialogue box for the first condition.

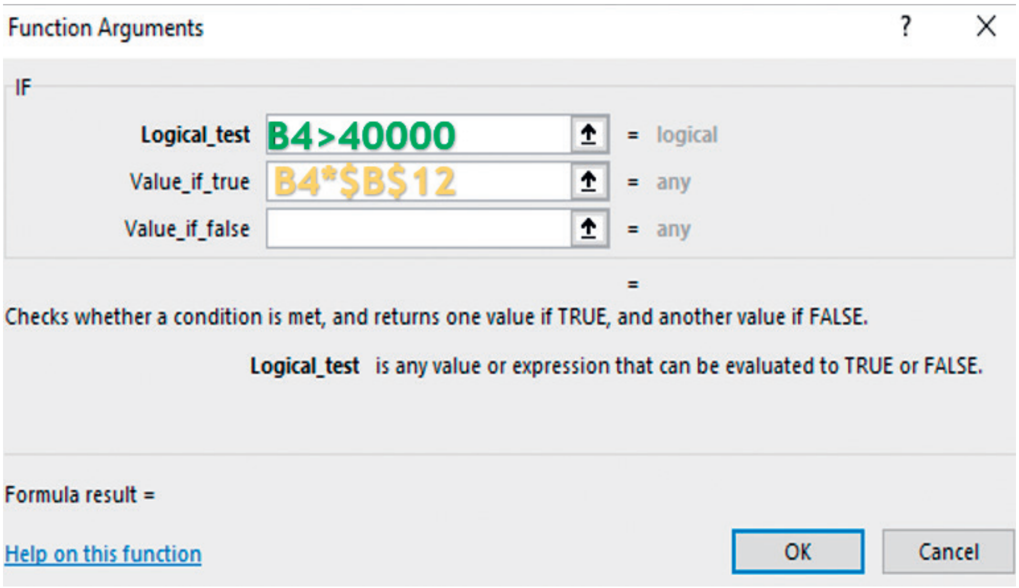


Figure 8.35

TOP TIP

Do not insert the currency symbol or comma in the number because then the IF statement won't work.

You cannot key in the 'Value if False' yet, as there are more conditions to check.

TOP TIP

Always start with the highest condition in a nested IF statement, otherwise the lowest condition will be met first and return an inaccurate result.

Step Three: Click into the 'Value if False' box. Then go up to the 'Name Box' of the spreadsheet and either click on 'IF' or search for it in the drop-down menu.

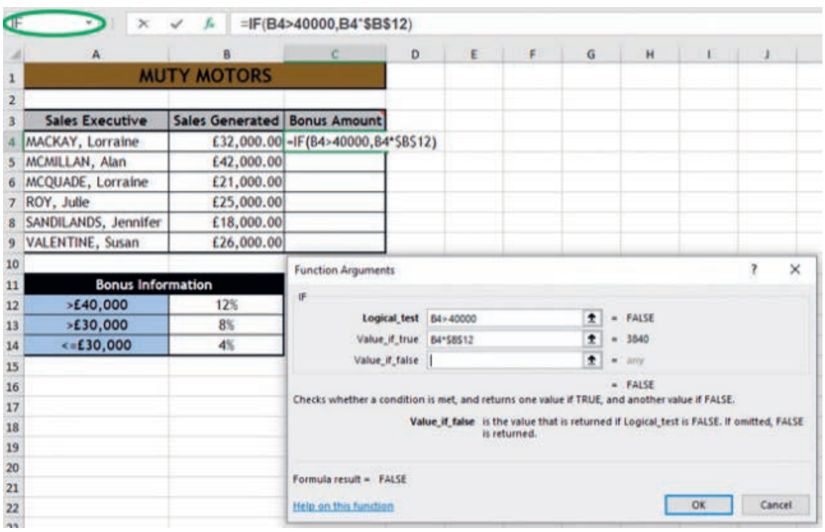


Figure 8.36

Step Four: A new dialogue box will appear. This has created a 'new' IF statement within the original IF statement. You can now construct the IF statement to show the second and third conditions. Click 'OK' and your nested IF statement is complete.

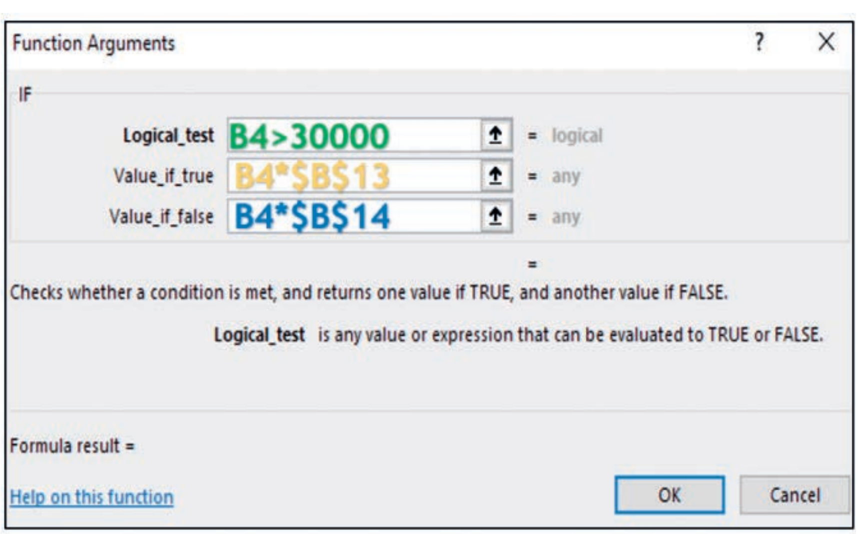


Figure 8.37

Digital resources, consisting of practice tasks and a practice assignment, are available at **www.hoddergibson.co.uk/higher-admin-tasks**

	A	B	C
1	MUTY MOTORS		
2			
3	Sales Executive	Sales Generated	Bonus Amount
4	MACKAY, Lorraine	£32,000.00	£2,560.00
5	MCMILLAN, Alan	£42,000.00	£5,040.00
6	MCQUADE, Lorraine	£21,000.00	£840.00
7	ROY, Julie	£25,000.00	£1,000.00
8	SANDILANDS, Jennifer	£18,000.00	£720.00
9	VALENTINE, Susan	£26,000.00	£1,040.00
10			
11	Bonus Information		
12	>£40,000	12%	
13	>£30,000	8%	
14	<=£30,000	4%	

Figure 8.38

TOP TIP

Always click cells rather than typing figures into the IF statement. This means if the content of the cell changes, the figure will automatically update. It also reduces the risk of keyboarding errors.

The first condition to be checked (should be highest)	The value if first condition is true	The second condition to be checked	The value if second condition is true	The value if no conditions are met
=IF(B4>40000,	B4*B12,	IF(B4>30000,	B4*B13,	B4*B14))

Figure 8.39

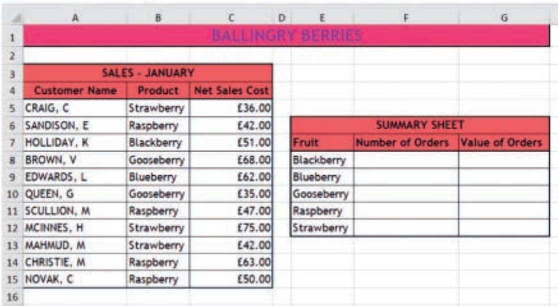
COUNTIF

The COUNTIF function is used to determine how many cells within a given range **meet a given condition**. It can be used to count how many cells contain a particular word or have a value greater than/less than/equal to a given figure from within a range.

COUNTIF is made up of two components:

- **Range**: The cells the spreadsheet is to search for the condition.
- **Criteria**: The condition (phrase or value) that is to be searched for.

COUNTIF – worked example



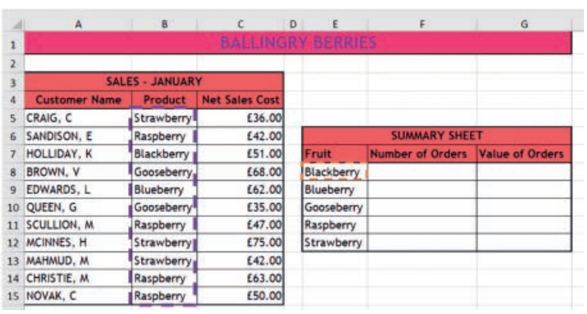
	A	B	C	D	E	F	G
1	BALLINGRY BERRIES						
2							
3	SALES - JANUARY						
4	Customer Name	Product	Net Sales Cost				
5	CRAIG, C	Strawberry	£36.00				
6	SANDISON, E	Raspberry	£42.00		SUMMARY SHEET		
7	HOLLIDAY, K	Blackberry	£51.00		Fruit	Number of Orders	Value of Orders
8	BROWN, V	Gooseberry	£68.00		Blackberry		
9	EDWARDS, L	Blueberry	£62.00		Blueberry		
10	QUEEN, G	Gooseberry	£35.00		Gooseberry		
11	SCULLION, M	Raspberry	£47.00		Raspberry		
12	MCINNES, H	Strawberry	£75.00		Strawberry		
13	MAHMUD, M	Strawberry	£42.00				
14	CHRISTIE, M	Raspberry	£63.00				
15	NOVAK, C	Raspberry	£50.00				
16							

Figure 8.40

Ballingry Berries sell fresh berries from their farm shop. The spreadsheet shows the number of sales and sales revenue generated from each customer in the month of January. We need to complete the 'Number of Orders' for each fruit as part of the 'Summary Sheet'. This would be done using COUNTIF.

Step One: In cell F8, key in '=COUNTIF('. Launch the function palette (fx) so the dialogue box appears.

Step Two: Assemble the COUNTIF by completing the 'Function Arguments' dialogue box for the first condition.



	A	B	C	D	E	F	G
1	BALLINGRY BERRIES						
2							
3	SALES - JANUARY						
4	Customer Name	Product	Net Sales Cost				
5	CRAIG, C	Strawberry	£36.00				
6	SANDISON, E	Raspberry	£42.00		SUMMARY SHEET		
7	HOLLIDAY, K	Blackberry	£51.00		Fruit	Number of Orders	Value of Orders
8	BROWN, V	Gooseberry	£68.00		Blackberry		
9	EDWARDS, L	Blueberry	£62.00		Blueberry		
10	QUEEN, G	Gooseberry	£35.00		Gooseberry		
11	SCULLION, M	Raspberry	£47.00		Raspberry		
12	MCINNES, H	Strawberry	£75.00		Strawberry		
13	MAHMUD, M	Strawberry	£42.00				
14	CHRISTIE, M	Raspberry	£63.00				
15	NOVAK, C	Raspberry	£50.00				

Figure 8.41

The RANGE is where we want to look for the condition. This is B5:B15 (in purple serrated lines). This should be absoluted (F4).

The CRITERIA is what we are looking for within the range. Use the cell that states the fruit, which for the first instance is E8 (orange serrated lines).

Your Function Arguments box should look like this once complete. Click 'OK'.

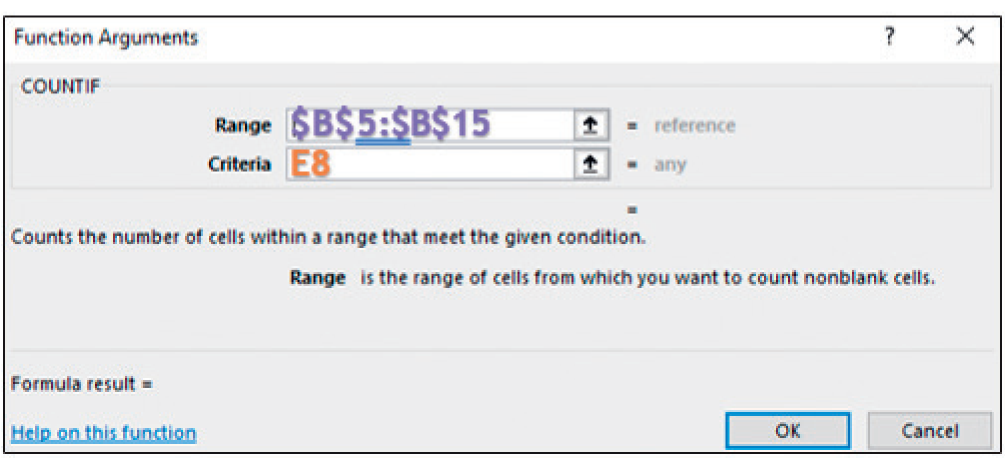


Figure 8.42

Step Three: Replicate the formula down to F12. As you have absoluted the 'range' your answer should be the same as below.

SUMMARY SHEET		
Fruit	**Number of Orders**	**Value of Orders**
Blackberry	1	
Blueberry	1	
Gooseberry	2	
Raspberry	4	
Strawberry	3	

Figure 8.43

TOP TIP

COUNTIF and SUMIF are usually used on 'Summary Sheets' which are on a separate worksheet within the same workbook. This means you need to 'link' to cells on other pages, which will include the worksheet name.

SUMIF

Similar to the COUNTIF function, SUMIF is used to determine which cells meet a particular condition. However, the difference here is they **total together** the contents of the numerical cells within the range to give a '**total**' value. SUMIF is made up of three components:

- Range: The cells the spreadsheet is to search for the condition.
- Criteria: The condition (phrase or value) that is to be searched for.
- Sum range: The cells within the range that should be totalled if they meet the condition.

SUMIF – worked example

To complete the 'Ballingry Berries' summary sheet, we need to find the total 'Value of Orders' for each fruit.

Step One: In cell G8, key in '=SUMIF('. Launch the function palette (fx) so the dialogue box appears.

Step Two: Assemble the SUMIF by completing the 'Function Arguments' dialogue box for the first condition.

The RANGE is where we want to look for the condition and its associated value. This is B5:C15 (in purple serrated lines). This should be absoluted (F4).

	A	B	C	D	E	F	G
1	BALLINGRY BERRIES						
2							
3	SALES - JANUARY						
4	Customer Name	Product	Net Sales Cost				
5	CRAIG, C	Strawberry	£36.00				
6	SANDISON, E	Raspberry	£42.00		SUMMARY SHEET		
7	HOLLIDAY, K	Blackberry	£51.00		Fruit	Number of Orders	Value of Orders
8	BROWN, V	Gooseberry	£68.00		Blackberry	1	=SUMIF()
9	EDWARDS, L	Blueberry	£62.00		Blueberry	1	
10	QUEEN, G	Gooseberry	£35.00		Gooseberry	2	
11	SCULLION, M	Raspberry	£47.00		Raspberry	4	
12	MCINNES, H	Strawberry	£75.00		Strawberry	3	
13	MAHMUD, M	Strawberry	£42.00				
14	CHRISTIE, M	Raspberry	£63.00				
15	NOVAK, C	Raspberry	£50.00				

Figure 8.44

The CRITERIA is what we are looking for within the range. Use the cell that states the fruit, which for the first instance is E8 (orange serrated lines).

The SUMRANGE is the cells we want to add together if they meet the criteria. These are C5:C15 (blue serrated lines). This should be absoluted (F4). Your Function Arguments box should look like this once complete. Click 'OK'.

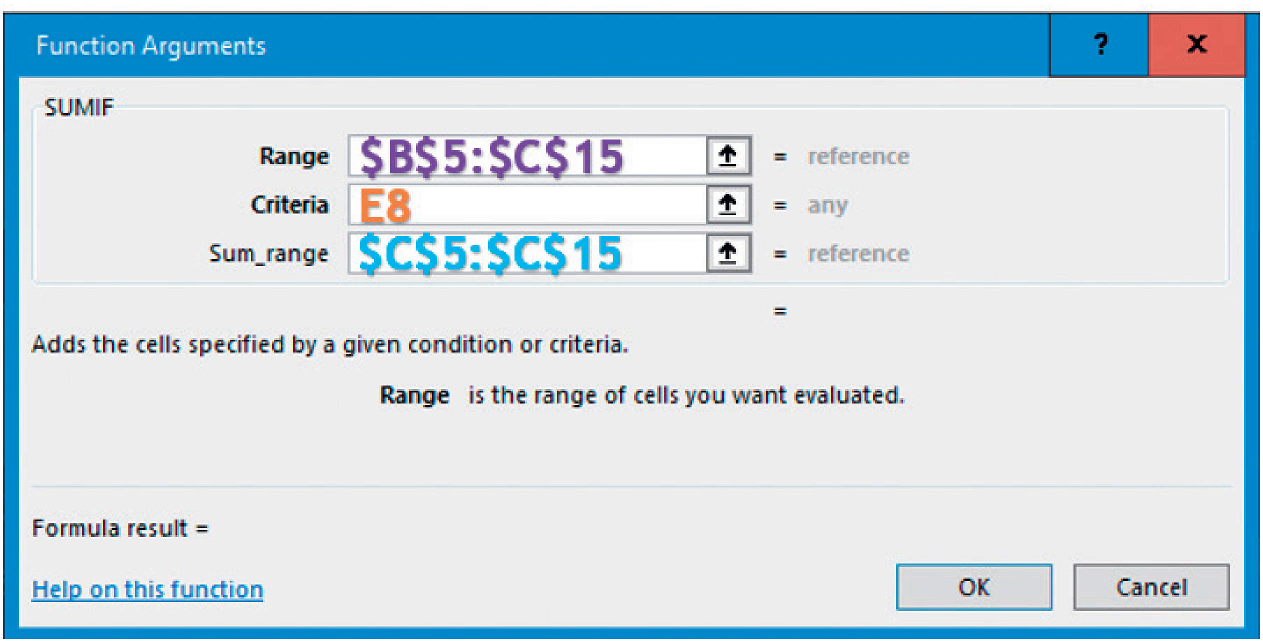


Figure 8.45

Step Three: Replicate the formula down to G12. As you have absoluted the 'range', your answer should be the same as Figure 8.46 – remember to format the cells to currency.

Digital resources, consisting of practice tasks and a practice assignment, are available at **www.hoddergibson.co.uk/higher-admin-tasks**

SUMMARY SHEET		
Fruit	Number of Orders	Value of Orders
Blackberry	1	£51.00
Blueberry	1	£62.00
Gooseberry	2	£103.00
Raspberry	4	£202.00
Strawberry	3	£153.00

Figure 8.46

TOP TIP

Ranges and Sum Ranges must always be absoluted if replicating them – they will not change. The criteria will change. Link to this cell to avoid keyboarding errors.

Vertical lookups (V LOOKUPS)

A vertical lookup (V LOOKUP) locates a **specified phrase or value** within a range and then returns a corresponding value or phrase from the same range but a different column. This is typically used in examples such as locating the price of products and often links to another worksheet in the workbook (3D formulae).

V LOOKUPS are made of four components:

- **Lookup value**: The criterion – what you are wanting the lookup to search for. This is not the value that will be returned.
- **Table array**: The range – where you want the lookup to search. This must include the 'lookup value' and the corresponding value you want to be displayed.
- **Col index num**: This is the number of the column you want the corresponding value to be returned from. This is the number of columns along in the table array.
- **Range lookup**: False – To find an exact match for the value. True – Use for numerical values to find the closest match.

V LOOKUP – worked example

The customer order for L Yates needs to be completed by The Fortune Cookie restaurant. The pricelist is alongside the order form. A LOOKUP should be used to retrieve the prices instead of updating it manually. This means that if the prices are updated or changed, it avoids the need to re-enter the prices manually into the order.

A V LOOKUP should be used as the table runs vertically down the page and not across the page.

	A	B	C	D	E	F	G
1	FORTUNE COOKIE CHINESE RESTAURANT					PRICELIST	£
2	CUSTOMER ORDER					Chicken Curry	£6.50
3	Customer	L Yates	Date	19/01/2021		Sweet & Sour Chicken	£7.20
4	Product	Quantity	Price	Total Cost		Chicken & Black Bean Sauce	£7.50
5	Honey Chilli Chicken	4				Chicken & Oyster Sauce	£8.50
6	Chicken Curry	3				Honey Chilli Chicken	£7.90
7	Chicken & Black Bean Sauce	2				Chicken Kung Po	£6.60
8	Peking Chicken	1				Szechuan Chicken	£5.80
9						Peking Chicken	£7.00
10						Chicken Satay	£6.20

Figure 8.47

Step One: In cell C8, key in '=V LOOKUP('. Launch the function palette (fx) so the dialogue box appears.

Step Two: Assemble the V LOOKUP by completing the 'Function Arguments' dialogue box.

Lookup value	Table array	Col index num	Range lookup
The product we are wanting to locate in the pricelist.	The range of data we are searching in (product and price).	The column from the table array we want the value from.	FALSE as we are wanting to find the exact price.
A5	F2:G10	2	FALSE

Table 8.6

The **LOOKUP VALUE** is the phrase we want to locate from the table array. Use the cell that states the product, which for the first instance is A5 (in purple serrated lines).

The **TABLE ARRAY** is the range of cells we want to search in for the 'lookup value' and the corresponding cell we want to display. In this example, the table array is F2:G10 (orange serrated lines). This should be absoluted (F4).

The **COL INDEX NUMBER** is the column from the table array that we want to locate a corresponding value to display as the result. This is nothing to do with the column letter of the worksheet, but the column of the table array. This is 2 or cells G2:G10 (blue serrated lines).

The **RANGE LOOKUP** is either True or False. As we want to find an exact match, meaning the price of the product, it is FALSE.

Your Function Arguments box should look like Figure 8.48 once complete. Click 'OK'.

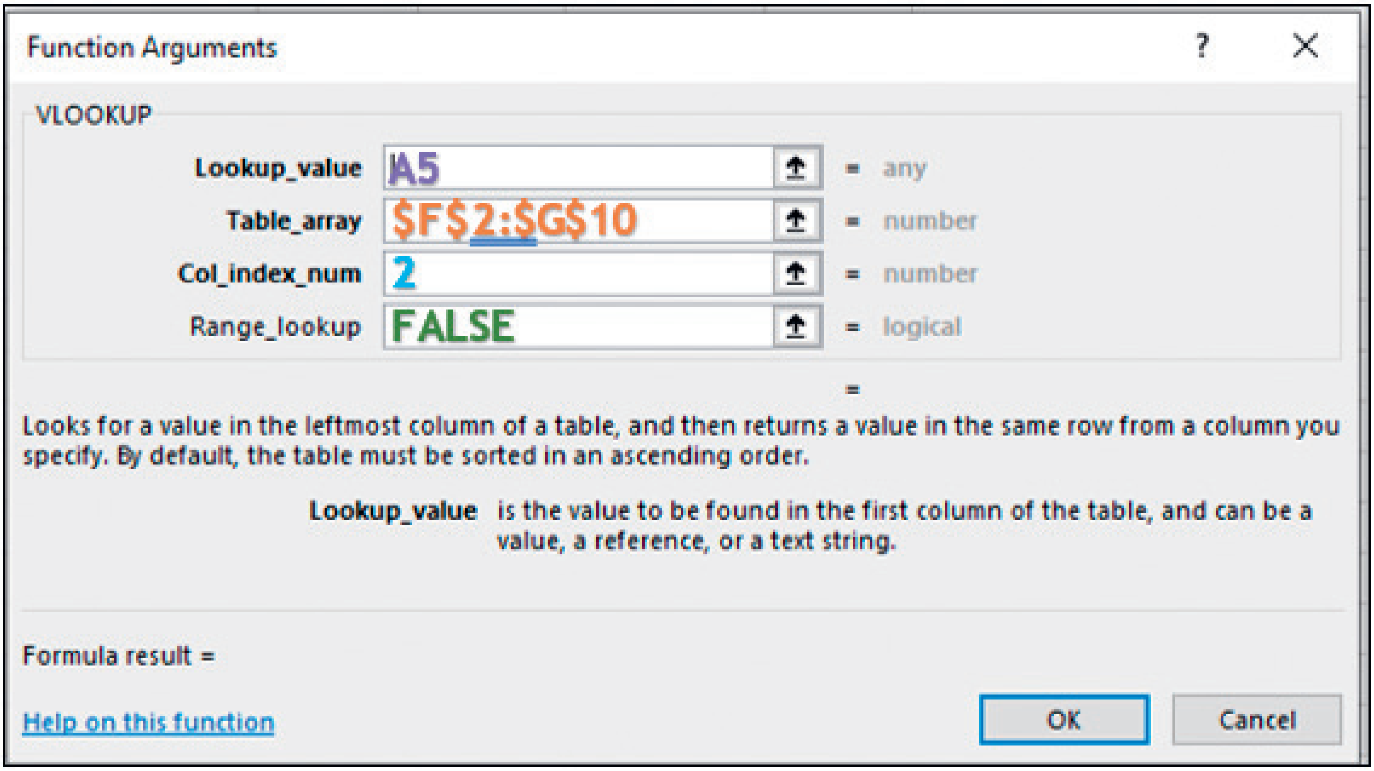


Figure 8.48

Step Three: Replicate the formula down to D8. As you have absoluted the 'table array' your answer should be the same as below – remember to format the cells to currency.

	A	B	C	D
1	FORTUNE COOKIE CHINESE RESTAURANT			
2	CUSTOMER ORDER			
3	Customer	L Yates	Date	19/01/2021
4	Product	Quantity	Price	Total Cost
5	Honey Chilli Chicken	4	£7.90	
6	Chicken Curry	3	£6.50	
7	Chicken & Black Bean Sauce	2	£7.50	
8	Peking Chicken	1	£7.00	

Figure 8.49

TOP TIP

Always 'link' to the cell for the lookup value to ensure you have entered the phrase correctly.

EXAM TIP

In the Assignment, the 'Table Array' cells tend to be on another worksheet – example of 3D formulae.

Horizontal lookups (H LOOKUPS)

A horizontal lookup (H LOOKUP) locates a specified phrase or value within a range and then returns a corresponding value or phrase from the same range but a different row. This is typically used in examples such as locating the price of products and often links to another worksheet in the workbook (3D formulae).

H LOOKUPS are made of four components:

- **Lookup value**: The criterion – what you are wanting the lookup to search for. This is not the value that will be returned.
- **Table array**: The range – where you want the lookup to search. This must include the 'lookup value' and the corresponding value you want to be displayed.
- **Row index num**: This is the number of the row you want the corresponding value to be returned from. This is the number of rows down in the table array.
- **Range lookup**: False – To find an exact match for the value. True – Use for numerical values to find the closest match.

H LOOKUP – worked example

Fife Secondary School needs to know which level of award each student should receive based on their attendance percentage. A LOOKUP should be used to retrieve the award names instead of updating it manually.

	A	B	C	D
1	FIFE SECONDARY SCHOOL			
2	Attendance Awards			
3				
4	Student Name	Register Class	Attendance Percentage	Award
5	WATSON, R	6D1	50	
6	ANDERSON, S	6D1	98	
7	LAUCKNER, S	6D1	32	
8	BLACK, D	6D1	68	
9	BARREIRO, C	6D1	78	
10	MILLER, M	6D1	82	
11	SCATTOLIN, F	6D1	44	
12	BIRCHALL, M	6D1	100	
13				
14	Minimum Attendance Percentage	10	50	70
15	Level of Award	Bronze	Silver	Gold

Figure 8.50

An H LOOKUP should be used as the table runs horizontally across the page and not down the page.

Step One: In cell D8, key in '=HLOOKUP('. Launch the function palette (fx) so the dialogue box appears.

Step Two: Assemble the H LOOKUP by completing the 'Function Arguments' dialogue box.

Lookup value	Table array	Row index num	Range lookup
The percentage we are wanting to locate in the awards table.	The range of data we are searching in (percentage and award).	The row from the table array we want the value from.	TRUE as we are wanting to find the nearest percentage
C5	B14:D15	2	TRUE

Table 8.7

The **LOOKUP VALUE** is the phrase we want to locate from the table array. Use the cell that states the attendance percentage, which for the first instance is C5 (in purple serrated lines).

The **TABLE ARRAY** is the range of cells we want to search in for the 'lookup value' and the corresponding cell we want to display. In this example, the table array is B14:D15 (orange serrated lines). This should be absoluted (F4).

The **ROW INDEX NUMBER** is the row from the table array that we want to locate a corresponding value to display as the result. This is nothing to do with the row number of the worksheet, but the row of the table array. This is 2 or cells B15:D15 (blue serrated lines).

The **RANGE LOOKUP** is either True or False. As we want to find the nearest match, meaning the closest percentage point, it is TRUE.

Your Function Arguments box should look like Figure 8.51 once complete. Click 'OK'.

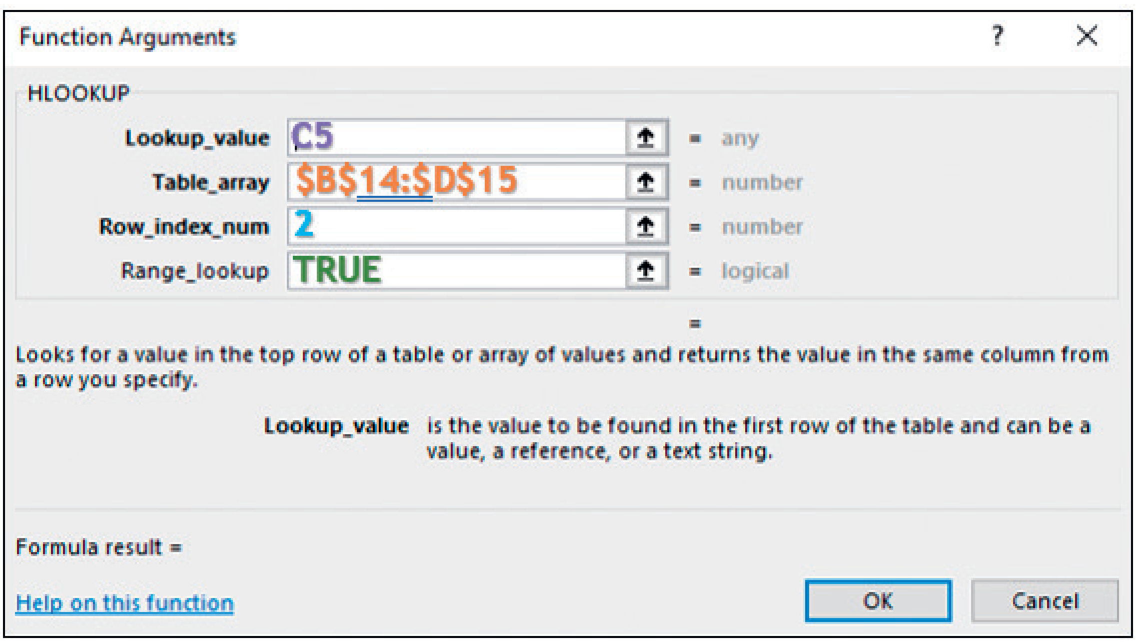


Figure 8.51

Step Three: Replicate the formula down to D12. As you have absoluted the 'table array', your answer should be the same as Figure 8.52.

	A	B	C	D
1	FIFE SECONDARY SCHOOL			
2	Attendance Awards			
3				
4	Student Name	Register Class	Attendance Percentage	Award
5	WATSON, R	6D1	50	Silver
6	ANDERSON, S	6D1	98	Gold
7	LAUCKNER, S	6D1	32	Bronze
8	BLACK, D	6D1	68	Silver
9	BARREIRO, C	6D1	78	Gold
10	MILLER, M	6D1	82	Gold
11	SCATTOLIN, F	6D1	44	Bronze
12	BIRCHALL, M	6D1	100	Gold
13				
14	Minimum Attendance Percentage	10	50	70
15	Level of Award	Bronze	Silver	Gold

Figure 8.52

EXAM TIP

If the 'value' needs rounding to the nearest value, the range lookup will be True. In Assignments, however, it will nearly always be an exact match you are looking for.

Grouping and subtotalling

Grouping (or outlining) allows the user to organise the data contained within a worksheet by sorting the data into **groups** based on similar information. Irrelevant parts of the data can be hidden from view and **subtotals** can be provided to give clearer information for decision making.

TOP TIP

For subtotalling to work, the data must first be sorted into the order you want to use. If you do not sort, you cannot outline or subtotal.

Grouping and subtotalling – worked example

The following spreadsheet lists the sales generated from staff at a car garage. It has already been sorted alphabetically by Agent Name. We want to group this data and provide a subtotal for each agent.

	A	B	C
1	CUPAR CAR SALES - JAN		
2			
3	Agent Name	Product	Sales
4	JONES, K	Mercedes	£54,000.00
5	JONES, K	Audi	£68,000.00
6	JONES, K	Vauxhall	£74,000.00
7	REID, E	Mercedes	£85,000.00
8	REID, E	Audi	£36,000.00
9	REID, E	Vauxhall	£47,000.00
10	SMYTH, D	Mercedes	£86,000.00
11	SMYTH, D	Audi	£35,000.00
12	SMYTH, D	Vauxhall	£27,000.00

Figure 8.53

Digital resources, consisting of practice tasks and a practice assignment, are available at **www.hoddergibson.co.uk/higher-admin-tasks**

Step One: Click in the first cell of the table (including headers). In this example, it is cell A3. Select the 'Data' ribbon and select 'Subtotal'. A small dialogue box should appear.

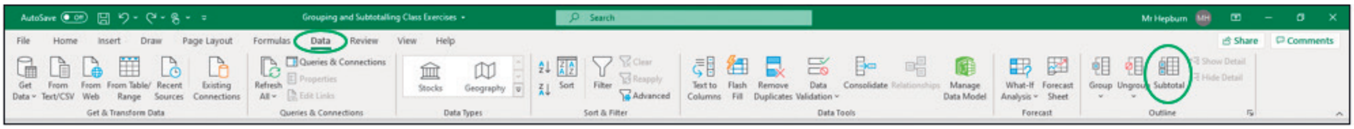


Figure 8.54

Step Two: We want to include subtotals for each Agent. Therefore, at the 'At each change in:' drop-down ensure 'Agent Name' is selected.

As we want to give the 'total' sales generated, at the 'Use function:' drop-down, select 'Sum'.

We want to total together the value of their sales generated, so under 'Add subtotal to:' ensure 'Sales' is ticked.

Ensure the top and bottom checked boxes are selected and click 'OK'.

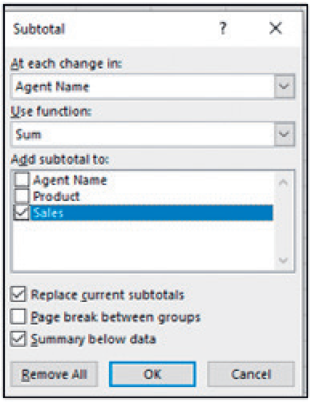
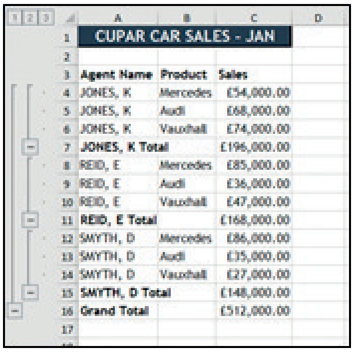


Figure 8.55

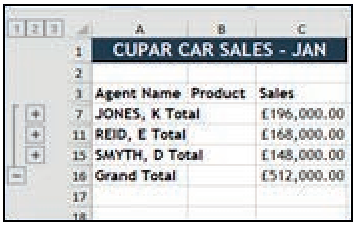
Step Three: The data has now been subtotalled based on the sales generated for each Sales Agent.

Based on the hierarchy of the data, we can hide data based on the level it is in the group using the numbers at the top left-hand corner. Read the question to check what needs to be shown.



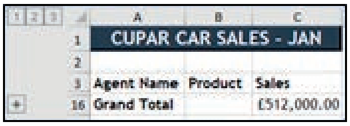
	A	B	C
1	CUPAR CAR SALES - JAN		
2			
3	Agent Name	Product	Sales
4	JONES, K	Mercedes	£54,000.00
5	JONES, K	Audi	£68,000.00
6	JONES, K	Vauxhall	£74,000.00
7	JONES, K Total		£196,000.00
8	REID, E	Mercedes	£85,000.00
9	REID, E	Audi	£36,000.00
10	REID, E	Vauxhall	£47,000.00
11	REID, E Total		£168,000.00
12	SMYTH, D	Mercedes	£86,000.00
13	SMYTH, D	Audi	£35,000.00
14	SMYTH, D	Vauxhall	£27,000.00
15	SMYTH, D Total		£148,000.00
16	Grand Total		£512,000.00
17			

Figure 8.56 Level 3 – shows all of the data itemised by Agent Name.



	A	B	C
1	CUPAR CAR SALES - JAN		
2			
3	Agent Name	Product	Sales
7	JONES, K Total		£196,000.00
11	REID, E Total		£168,000.00
15	SMYTH, D Total		£148,000.00
16	Grand Total		£512,000.00
17			

Figure 8.57 Level 2 – shows only Agent Name and their subtotal.



	A	B	C
1	CUPAR CAR SALES - JAN		
2			
3	Agent Name	Product	Sales
16	Grand Total		£512,000.00

Figure 8.58 Level 1 – Shows only the Grand Total sales generated.

TOP TIP

To ungroup data/remove subtotals, you need to click 'Subtotal' again and then 'Remove All' from the dialogue box.

Charting

Excel allows data to be presented in the form of **charts**. This is an advantage as it presents the data in a **visual manner** which can be easier to analyse and interpret. It also makes it easier for trends or patterns to be identified.

There are many different types of charts available in Excel. The main four are:

Figure 8.59 Bar charts – horizontal bars that allow for comparison.

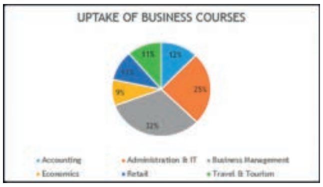


Figure 8.60 Pie charts – each 'slice' is a value as a proportion.

Figure 8.61 Line charts – use of data points to plot trends.

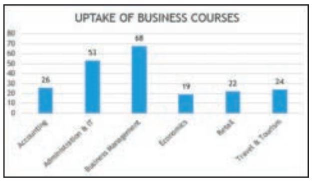


Figure 8.62 Column charts – vertical bars that allow for comparison.

To create a chart, you need to select all of the data you want to include. You then select the 'Insert' ribbon and select the most appropriate chart – the question may not explicitly tell you which chart to produce.

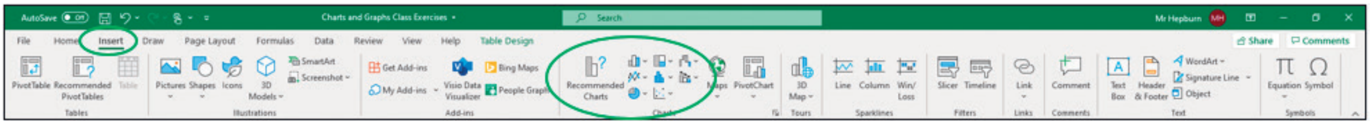


Figure 8.63

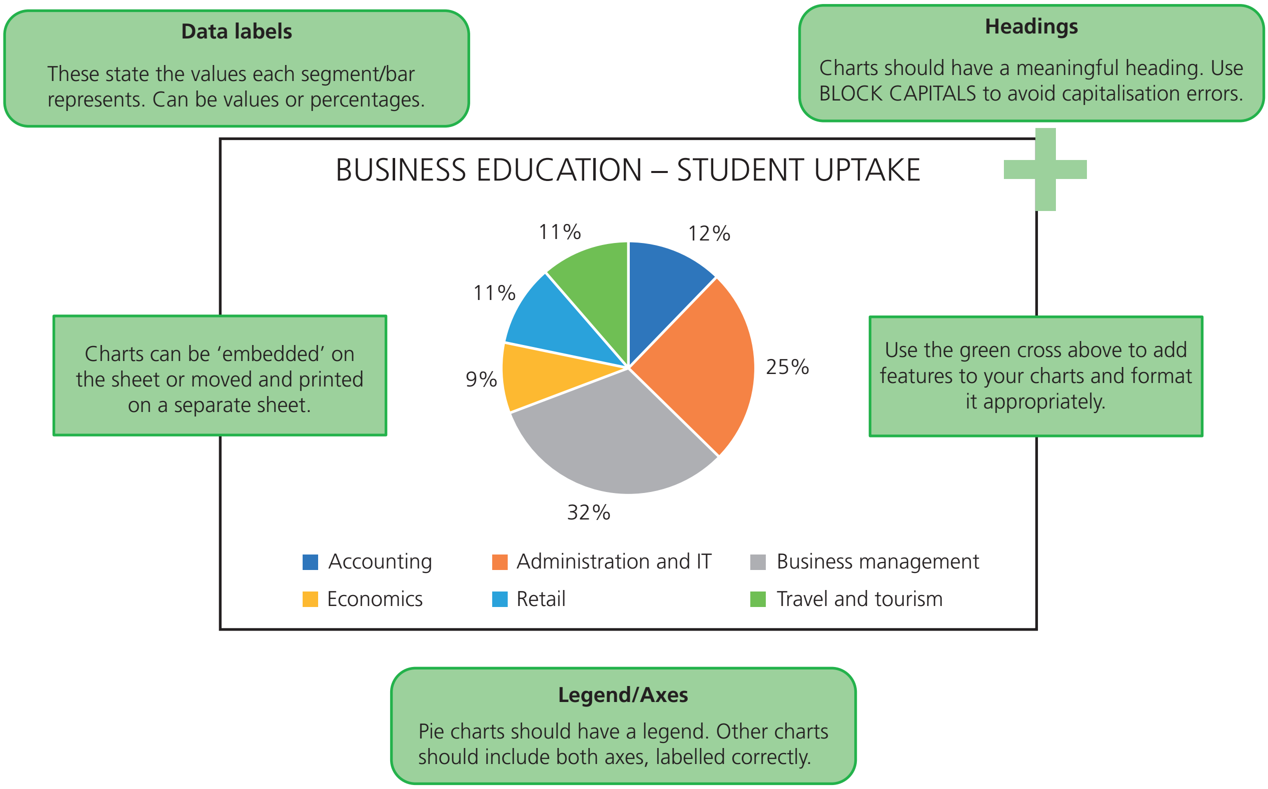


Figure 8.64 Creating charts

Digital resources, consisting of practice tasks and a practice assignment, are available at **www.hoddergibson.co.uk/higher-admin-tasks**

EXAM TIP

Read the question carefully to check what needs to be shown/included in charts – these can be worth up to four marks!

TOP TIP

To include data not next to each other, select the first column, hold CTRL and select the next set. This is called 'non-adjacent data'.

Pivot tables

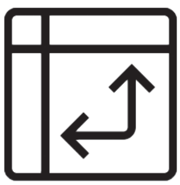


Figure 8.65

A pivot table can be used to help **summarise and manipulate data** contained within a spreadsheet. Producing a pivot table allows the user to analyse and interpret the data in a more meaningful way. It can provide statistical analysis using the following functions:

- Sum
- Count
- Average
- Min
- Max
- % of Total
- % of Row
- % of Column.

A pivot table has the following four components:

- **Filters**: Used if you only want to display particular values and omit others.
- **Columns**: Used to summarise the values and constructs the actual table vertically.
- **Rows**: Used to summarise the values and constructs the actual table horizontally.
- **Values**: Used to summarise and manipulate the data contained within the table.

EXAM TIP

Before producing a pivot table, try to visualise what it should look like by carefully reading the question.

The advantages of using a pivot table include:

- Can summarise data for reports and decision making instantly and accurately.
- Makes the data contained within a dense spreadsheet easier to understand.
- Data can be filtered to display only relevant and meaningful information.
- Different calculations can be carried out for multiple purposes.
- Can easily be converted to a pivot chart, which is a more visual representation.
- Can make patterns and trends easier to identify.

Digital resources, consisting of practice tasks and a practice assignment, are available at **www.hoddergibson.co.uk/higher-admin-tasks**

COMMAND WORD TIP

'**Justify** the use of a pivot table.' [2]

The command word 'justify' means to explain why something may benefit or bring an improvement.

What this question would be looking for is two advantages of pivot tables explained to the marker.

Pivot tables – worked example

The spreadsheet below contains celebration cake orders across five branches of a bakery chain.

	A	B	C	D	E
1	FIFE BAKERY				
2	Celebration Cake Orders				
3					
4	Product ID	Branch	Method	Price	Month Due
5	SC001	St Clair Street	Online	£32.00	June
6	JU001	Junction Road	Instore	£540.00	August
7	DU001	Dunearn Drive	Online	£18.00	June
8	HS001	High Street	Instore	£52.00	August
9	WH001	Whytescauseway	Instore	£825.00	September
10	JU002	Junction Road	Instore	£24.00	August
11	DU002	Dunearn Drive	Online	£30.00	June
12	HS002	High Street	Instore	£22.00	June
13	WH002	Whytescauseway	Instore	£40.00	June
14	JU003	Junction Road	Instore	£890.00	August
15	HS003	High Street	Instore	£65.00	September
16	SC002	St Clair Street	Instore	£30.00	September
17	DU003	Dunearn Drive	Instore	£42.00	August
18	SC003	St Clair Street	Instore	£325.00	July
19	HS004	High Street	Instore	£45.00	June
20	DU004	Dunearn Drive	Instore	£50.00	August
21	SC004	St Clair Street	Instore	£38.00	September
22	HS005	High Street	Online	£60.00	August
23	JU004	Junction Road	Instore	£720.00	August
24	SC005	St Clair Street	Instore	£40.00	July
25	DU005	Dunearn Drive	Instore	£120.00	June
26	WH003	Whytescauseway	Online	£85.00	July
27	JU005	Junction Road	Instore	£90.00	August
28	HS006	High Street	Instore	£580.00	September
29	SC006	St Clair Street	Instore	£20.00	July
30	WH004	Whytescauseway	Instore	£750.00	June
31	JU006	Junction Road	Online	£85.00	August

Figure 8.66

Although this spreadsheet contains all of the information required for the business to be operational, it is difficult to analyse and summarise the data as it is currently shown. Therefore, a pivot table could be used to make this data more meaningful.

TOP TIP

- There does not need to be a field in each section of the pivot table.
- Not all fields from the spreadsheet need to be used.

Question: Prepare a pivot table for orders due in the month of June. For each branch I would like to know the number of orders due and the value of these orders.

Step One: Read the question carefully and break down what it is actually looking for.

Digital resources, consisting of practice tasks and a practice assignment, are available at **www.hoddergibson.co.uk/higher-admin-tasks**

Month of June	Each branch	Number of orders	Value of orders
Only wants to see data/ orders for the month of June.	Wants the data to be presented on a per branch basis.	Wants to know the number of individual orders per branch.	Wants to know the total value of the orders per branch.
Filter	Columns	Values	Values

Table 8.8

Step Two: Select anywhere in the spreadsheet that is to be included in the pivot table. Select 'Insert' on the Home ribbon and then 'Pivot Table'.

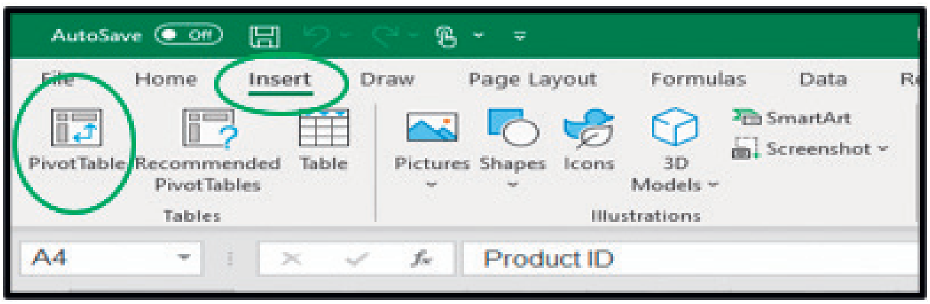
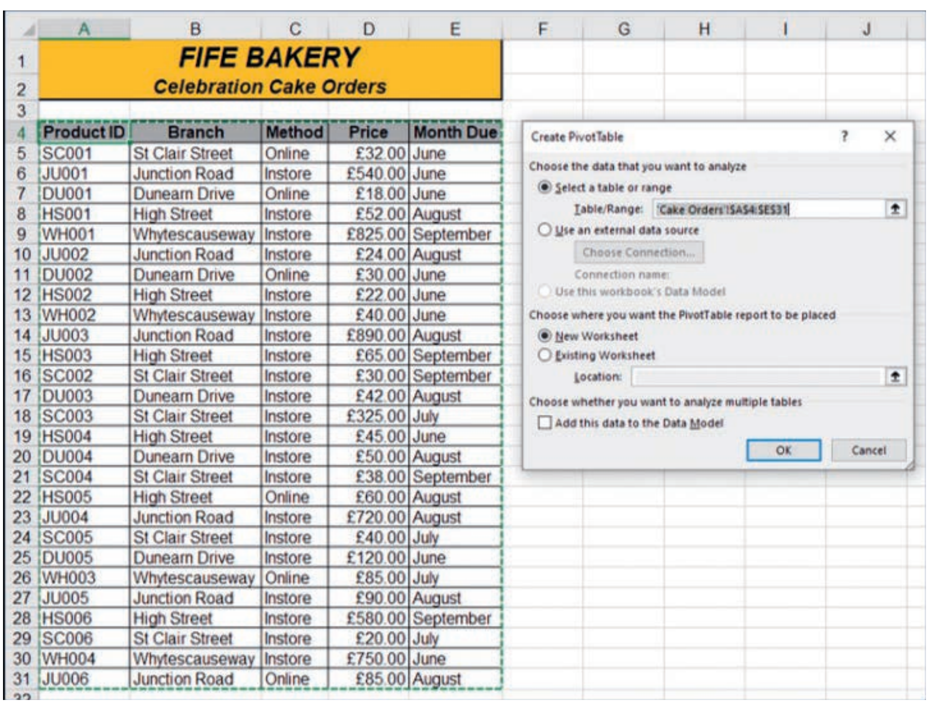


Figure 8.67

Step Three: A dialogue box will appear. The 'Table/Range' is what should be included in the pivot table. This will automatically select all of the information in the original table. A serrated line will appear around all of the information.

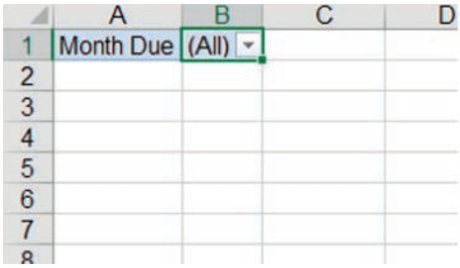


FIFE BAKERY
Celebration Cake Orders

Product ID	Branch	Method	Price	Month Due
SC001	St Clair Street	Online	£32.00	June
JU001	Junction Road	Instore	£540.00	June
DU001	Dunearn Drive	Online	£18.00	June
HS001	High Street	Instore	£52.00	August
WH001	Whytescauseway	Instore	£825.00	September
JU002	Junction Road	Instore	£24.00	August
DU002	Dunearn Drive	Online	£30.00	June
HS002	High Street	Instore	£22.00	June
WH002	Whytescauseway	Instore	£40.00	June
JU003	Junction Road	Instore	£890.00	August
HS003	High Street	Instore	£65.00	September
SC002	St Clair Street	Instore	£30.00	September
DU003	Dunearn Drive	Instore	£42.00	August
SC003	St Clair Street	Instore	£325.00	July
HS004	High Street	Instore	£45.00	June
DU004	Dunearn Drive	Instore	£50.00	August
SC004	St Clair Street	Instore	£38.00	September
HS005	High Street	Online	£60.00	August
JU004	Junction Road	Instore	£720.00	August
SC005	St Clair Street	Instore	£40.00	July
DU005	Dunearn Drive	Instore	£120.00	June
WH003	Whytescauseway	Online	£85.00	July
JU005	Junction Road	Instore	£90.00	August
HS006	High Street	Instore	£580.00	September
SC006	St Clair Street	Instore	£20.00	July
WH004	Whytescauseway	Instore	£750.00	June
JU006	Junction Road	Online	£85.00	August

Figure 8.68

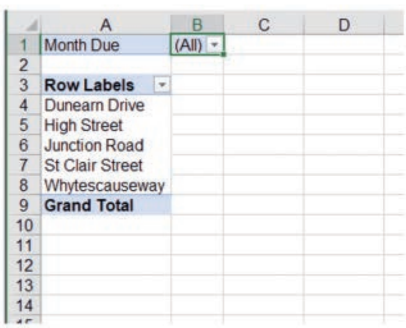
Ensure the 'New Worksheet' tick box is selected so that the pivot table will be created in an additional tab within the workbook. Select 'OK' and your pivot table will be created.



	A	B	C	D
1	Month Due	(All)		
2				
3				
4				
5				
6				
7				

Figure 8.69

Step Four: Begin assembling the pivot table from your understanding of the question. Drag down ‘Month Due’ into the ‘Filters’ section of the pivot table. This now means that the pivot table can be filtered by each month contained within the spreadsheet.



	A	B	C	D
1	Month Due	(All)		
2				
3	**Row Labels**			
4	Dunearn Drive			
5	High Street			
6	Junction Road			
7	St Clair Street			
8	Whytescauseway			
9	**Grand Total**			
10				
11				
12				
13				
14				

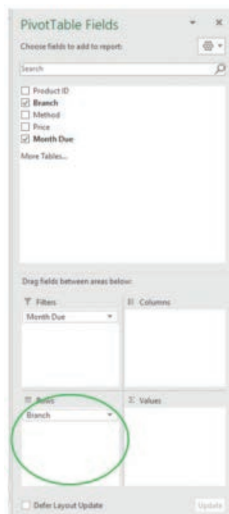
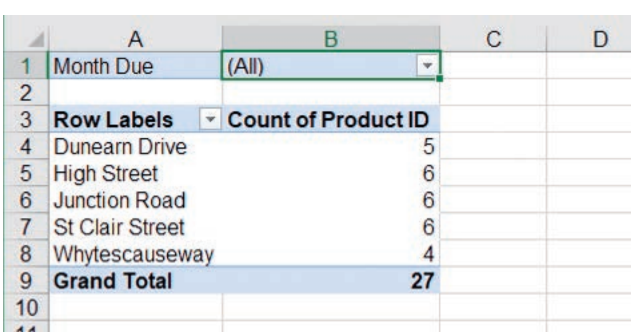


Figure 8.70

Step Five: The pivot table needs to display the data on a per branch basis. Drag down ‘Branch’ to the ‘Rows’ section of the pivot table. This will now display each branch vertically down the pivot table and will summarise the content of the pivot table.



	A	B	C	D
1	Month Due	(All)		
2				
3	**Row Labels**	**Count of Product ID**		
4	Dunearn Drive	5		
5	High Street	6		
6	Junction Road	6		
7	St Clair Street	6		
8	Whytescauseway	4		
9	**Grand Total**	**27**		
10				

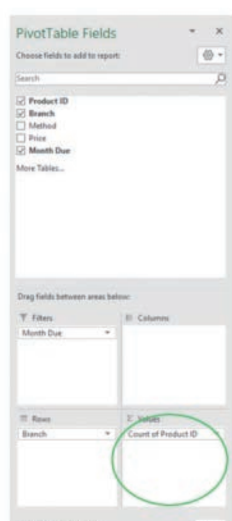


Figure 8.71

Step Six: The pivot table needs to display the number of orders per branch for the month. The only piece of data that is unique to each order is the ‘Product ID’. Drag down ‘Product ID’ to the ‘Values’ section of the pivot table. This should automatically set the value to ‘Count’ to find the ‘Number Of’. If not, right-click on the field label, select ‘Summarise Values By’ and select ‘Count’.

	A	B	C
1	Month Due	(All)	
2			
3	Row Labels	Count of Product ID	Sum of Price
4	Dunearn Drive	5	260
5	High Street	6	824
6	Junction Road	6	2349
7	St Clair Street	6	485
8	Whytescauseway	4	1700
9	Grand Total	27	5618

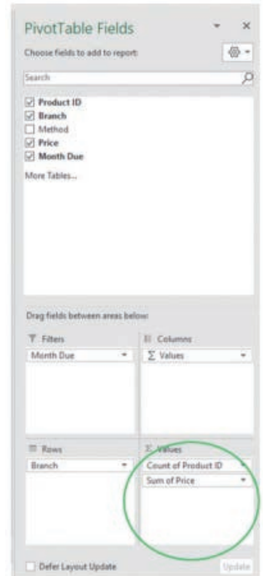


Figure 8.72

Step Seven: The pivot table also needs to display the value of the orders per branch for the month. Drag down 'Price' to the 'Values' section of the pivot table. This should automatically set the value to 'Sum' to find the Total Value Of. If not, right-click on the field label, select 'Summarise Values By' and select 'Sum'. This will now add together the value of all orders per branch.

Step Eight: The pivot table has now been constructed as asked by the question. However, it has not been formatted correctly and would lose multiple marks.

The 'Count of Product ID' is telling us the 'Number of Orders' per branch. Simply select the cell and enter the intended field name, ensuring consistency with capitalisation and spelling.

	A	B	C
1	Month Due	(All)	
2			
3	Branch	Number of Orders	Value of Orders
4	Dunearn Drive	5	260
5	High Street	6	824
6	Junction Road	6	2349
7	St Clair Street	6	485
8	Whytescauseway	4	1700
9	Grand Total	27	5618

Figure 8.73

The 'Sum of Price' is telling us the 'Value of Orders' per branch.

The 'Row Labels' is listing all of the branches so this could be called 'Branch'.

Step Nine: The 'Value of Orders' field is talking about the financial cost of the orders per branch and so should be formatted to currency. Be sure to format the 'Grand Total' in cell C9 to currency.

EXAM TIP

In every pivot table created, candidates must:

- ensure all cells are formatted based on their contents, for example, currency
- change all labels in the pivot table to something more meaningful.

	A	B	C
1	Month Due	(All)	
2			
3	Branch	Number of Orders	Value of Orders
4	Dunearn Drive	5	£260.00
5	High Street	6	£824.00
6	Junction Road	6	£2,349.00
7	St Clair Street	6	£485.00
8	Whytescauseway	4	£1,700.00
9	Grand Total	27	£5,618.00

Figure 8.74

Step Ten: The question is only asking for data to be presented for the month of June. At the 'Month Due' in cell B1, select the filter option and select 'June'. Now the pivot table is complete.

Pivot tables are worth between 4 and 6 marks in the Assignment. Pivot table tasks are often included within the Word processing tasks.

	A	B	C
1	Month Due	June	
2			
3	**Branch**	**Number of Orders**	**Value of Orders**
4	Dunearn Drive	3	£168.00
5	High Street	2	£67.00
6	Junction Road	1	£540.00
7	St Clair Street	1	£32.00
8	Whytescauseway	2	£790.00
9	**Grand Total**	**9**	**£1,597.00**

Figure 8.75

If the question also asks for a pivot chart, select the 'Pivot Chart' option. Design the pivot table as normal, and the chart will automatically be generated beside it.

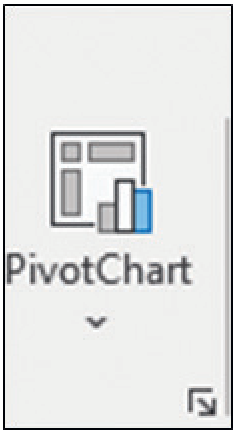


Figure 8.76

You can edit/format the chart just as you would a normal chart: for example, change headings.

Printing

Spreadsheet questions generally require two printouts, each following their own standard procedures. These should always be followed, unless the question explicitly states otherwise.

Value view	Formulae view
Shows the solutions/formatting	Shows the formulae/functions used
Gridlines only	Gridlines and row and column headings
Fit to one page	Fit to one page
Landscape	Landscape
Footer (NAME/SCN and Task)	Footer (NAME/SCN and Task)

Table 8.9 Printing spreadsheets

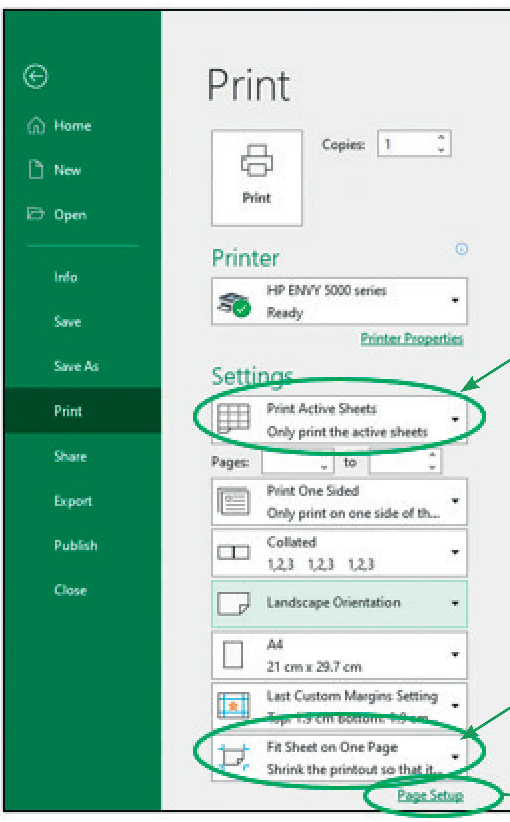
These can all be set up/changed on the 'Page Layout' ribbon shown below.

Figure 8.77

Other changes need to be made in the 'Print' options.

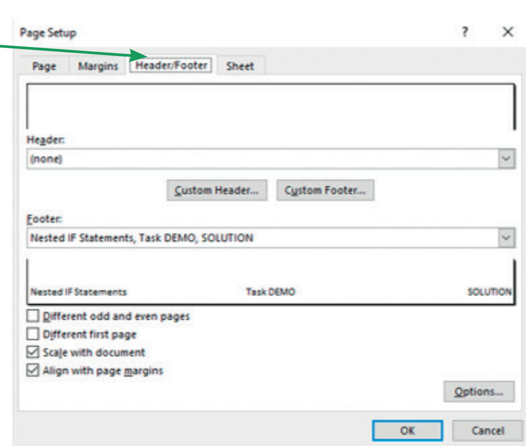
STUDY TIP

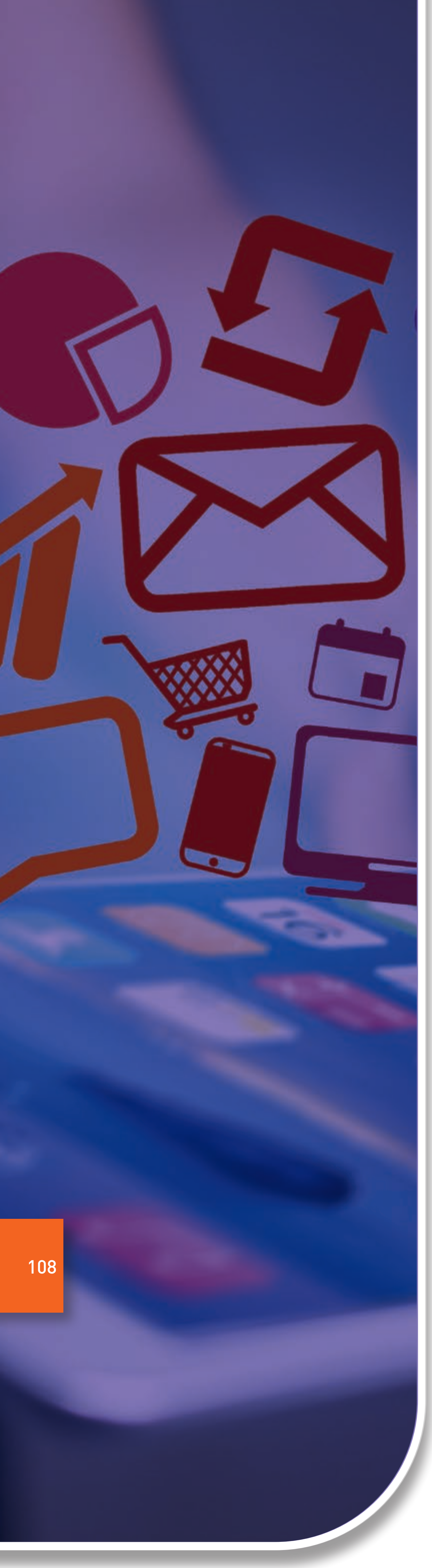
Check whether the orientation is portrait or landscape.



Select this option if you want to print only active sheets.

Select this option if you want to print 'omitting' or only show specific parts of the worksheet. You need to select/highlight the cells that require printing.





Chapter 9 Databases

Introduction to databases and tables

Figure 9.1 Microsoft Access logo

Databases are used to store large quantities of **related information** in a logical manner. Data is stored within **tables** which can be updated using **forms**. This data can be manipulated to solve business problems using queries and presented in reports. The data can also be sorted or filtered to make it more meaningful. Microsoft Access is software used to generate and edit databases.

COMMAND WORD TIP

'**Describe** the features of a database.' [4]

This question is asking you to give characteristics of a database.

This could include tables, forms, queries and reports, in addition to more generic features of the software, such as that it can be password protected and accessed by multiple users.

Tables

Tables are where data is stored within a database. Tables contain related information based around a particular topic or subject. Tables are made up of records and fields.

- **Records**: All of the information regarding one particular person or topic. These go horizontally across the table.
- **Fields**: A particular piece of information contained within a record about a particular person or topic. These go vertically down the table.

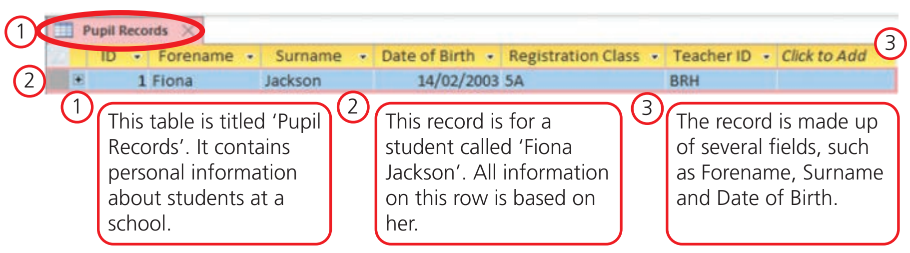


Figure 9.2

To view complete tables or to input new data, you must always be on '**Datasheet View**'. To make amendments to field names or data types, or to add new fields to the database, you must go to '**Design View**'.

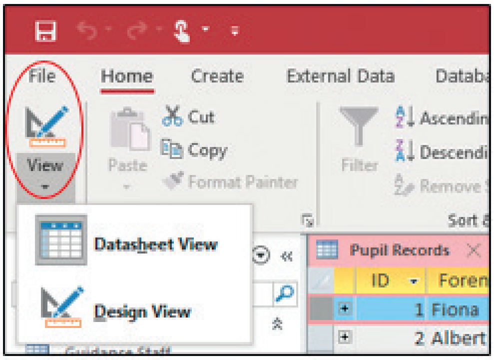
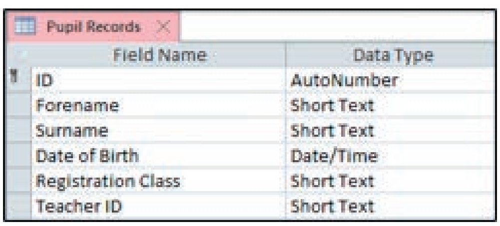


Figure 9.3

Tables within a database are designed to contain the correct data, organised in a logical way. Therefore, **fields** are designed to contain a particular type of information. To ensure that when you are entering the data you are inserting the correct information, the fields are allocated '**data types**'.



Pupil Records

Field Name	Data Type
ID	AutoNumber
Forename	Short Text
Surname	Short Text
Date of Birth	Date/Time
Registration Class	Short Text
Teacher ID	Short Text

Figure 9.4

EXAM TIP

Always read through the tables before starting a database question.

SHORT TEXT	Used for entering text into a field. EXAMPLES: Name, Address, Course title.
NUMBER	Used for entering numerical values into a field. EXAMPLES: Age, Number in stock, Door number.
DATE/TIME	Used for entering dates/times. These can be formatted accordingly. EXAMPLES: Date of birth, Time of appointment, Date joined.
CURRENCY	Used for entering monetary values. Currency and decimals can be formatted. EXAMPLES: Price, Salary, Hourly rate.
YES/NO	Used to enter values that are fixed. Allows a 'tick box' to be used to indicate 'Yes'. EXAMPLES: Fully trained, Induction completed, Form submitted.
AUTONUMBER	Generates a unique number allocated to each record automatically. EXAMPLES: Customer ID, Employee ID, Branch ID.
LONG TEXT	Used for entering larger quantities of text into a field. Best queried using wildcards. EXAMPLES: Tour features, House incentives, Stall details.

Table 9.1 Types of data

Relationships

Databases can be referred to as either **flat** or **relational**.

Flat database	Relational database
When all of the records relating to a topic or subject are held in one table within a database, this is known as a flat database.	A database that is made up of two or more tables. These tables are linked via relationships that are established between them.

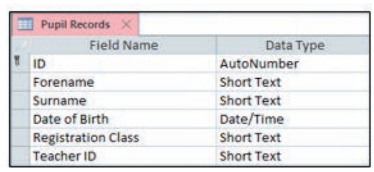
Table 9.2 Flat and relational databases

Relational databases have two or more tables which are **linked** to each other. This link is referred to as a **relationship**. In order to establish a relationship between two or more tables, you have to identify the '**primary key**'.

Figure 9.5

The primary key is the field within the table which has **unique data** related to each record. Therefore, it cannot be duplicated elsewhere within that table. Once you have established a primary key in two or more tables, you can assign a relationship to the tables, which will link them. The information must be identical in both tables. The primary key in one table may also be listed within another table, where the same data can be repeated several times. This is referred to as the '**foreign key**' and can be used to link tables via a relationship.

To establish a primary key, you must open the table in 'Design View'. Identify the unique characteristic or field in each record. Right-click on the grey pane at the side of the field name and select 'Primary Key'. The key icon will then appear next to the field name.



Pupil Records

Field Name	Data Type
ID	AutoNumber
Forename	Short Text
Surname	Short Text
Date of Birth	Date/Time
Registration Class	Short Text
Teacher ID	Short Text

Figure 9.6

Establishing relationships and relationship reports

Step One: Once primary keys have been established in two or more of the tables, select 'Database Tools' and then 'Relationships'.

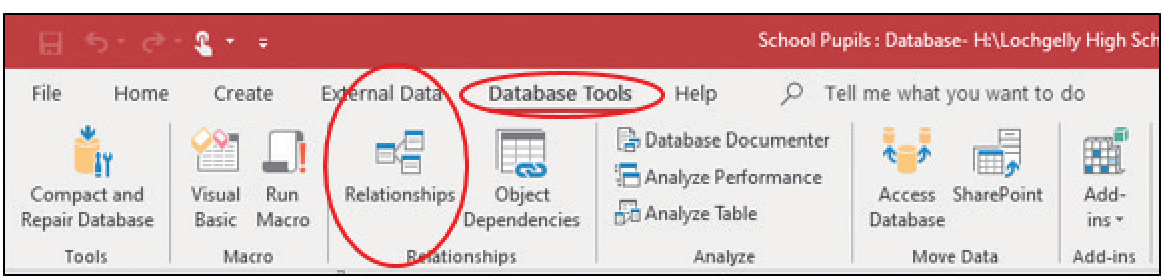


Figure 9.7

Step Two: The tables of the database should appear. Relationships can now be established between common fields. These common fields must contain identical data types (except for AutoNumber, which can be matched to a Number field and vice versa).

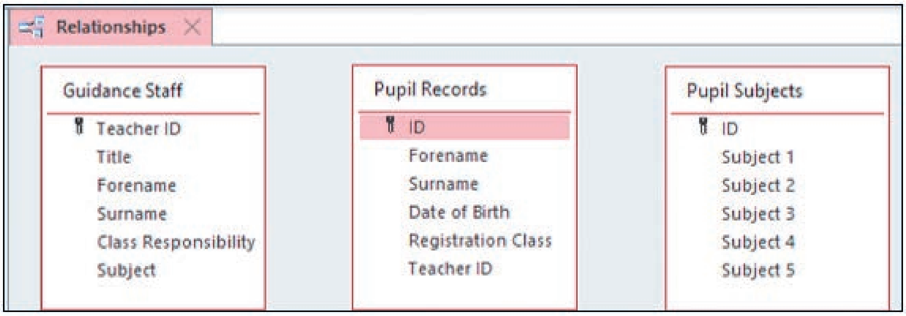


Figure 9.8

Drag the primary key from the first table to the corresponding field in the second table (which will be the foreign key). The relationships that need to be established are as follows:

Guidance Staff		Pupil Records		Pupil Subjects
Teacher ID	↔	Teacher ID		ID
		ID	↔	

Figure 9.9

Once these relationships are established, the database becomes relational as links have been set up between the tables.

Step Three: A dialogue box will appear once you have dragged the field name onto the corresponding field of the next table. Ensure that the relationships are valid and that you have selected the appropriate tick boxes. Use the table below to help.

Relationships	Description
One-to-one	This is where the primary key is unique to one individual record in the first table and the second table, meaning that each can only occur once in each table. Shown by the number 1 next to each primary key.
One-to-many	This is where the primary key is unique to one individual record in the first table but matches many different records in the second table (the foreign key). Shown by the infinity (∞) symbol next to the foreign key.
Enforce referential integrity	By selecting this tick box in the dialogue box, you are setting up a series of rules that will check that the relationships set up between tables are valid and that related data cannot be changed in one table only.
Cascade update related fields	By selecting this tick box in the dialogue box, if a value contained within a record is updated or amended, the database will automatically make the required changes to all other related records in related tables.
Cascade delete related fields	By selecting this tick box in the dialogue box, if a record is deleted in the primary table established, it will also delete the related information that is contained in other tables.

Table 9.3 Relationships

Select 'OK' once the relationship has been created and the correct rules applied.

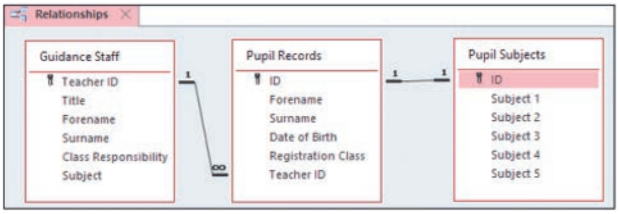


Figure 9.10

Step Four: Repeat Step Two and Step Three until all relationships have been established.

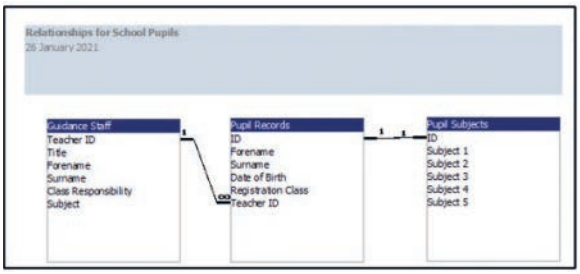


Figure 9.11

You may be asked to print evidence of the relationships established. Select 'Relationship Report' and then 'Print' to show the results.

Figure 9.12

Adding, deleting and modifying data in tables

To add, delete or modify data contained within tables, you need to first ensure that you have opened the correct table. Ensure you are on 'Datasheet View'.

To add a new record, simply go to the bottom of the table and begin keying in the data required.

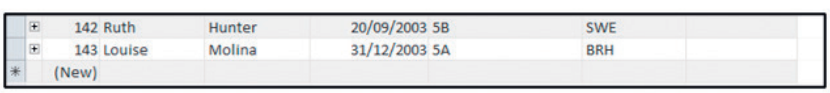


Figure 9.13

To delete an existing record, right-click on the grey square next to the appropriate record. Select '**Delete Record**'. It will ask if you are sure – check it is correct and select 'Yes'.

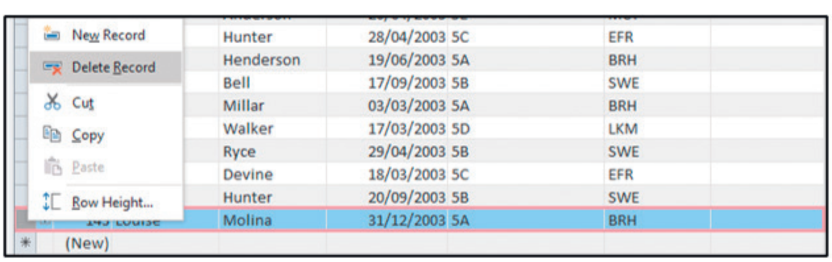


Figure 9.14

To modify data contained within a record, you simply need to click into the field and alter the information as required.

TOP TIP

Access does not spellcheck or automatically correct capitalisation so proofread your records.

Sorting and filtering

In order to make data more meaningful, it often has to be organised into a specific order. This is done through the 'Sort' function. At Higher, you are asked to sort data on a minimum of two fields at a time. This should be done using the **Advanced Sort** function. There are three ways of sorting data in Access.

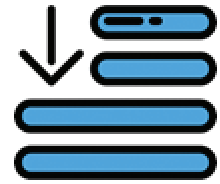


Figure 9.15

Alphabetical	Used when sorting 'Short Text' or 'Long Text' fields. For example, putting surnames into alphabetical order.	Sort A to Z Sort Z to A
Numerical	Used when sorting 'Number' or 'Currency' fields. For example, putting account numbers into numerical order.	Sort Smallest to Largest Sort Largest to Smallest
Chronological	Used when sorting 'Date/Time' fields. For example, putting dates into chronological order.	Sort Oldest to Newest Sort Newest to Oldest

Table 9.4 Sorting data

Sorting – worked example

The 'Pupil Records' table needs to be put into alphabetical order of 'Registration Class' and then alphabetical order of pupil 'Surname'.

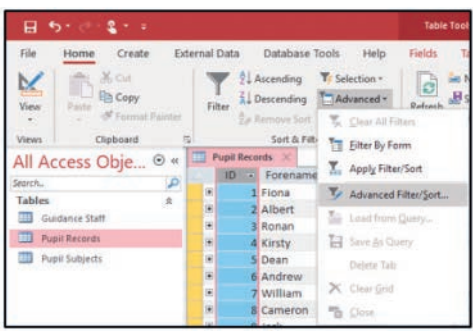


Figure 9.16

Step One: On the Home ribbon select the 'Advanced' option and then click 'Advanced Filter/Sort'.

Step Two: A box will appear with the table name at the top, listing all of the fields in the table. Drag these fields down to the 'Field' section of the pane below in the order you want the sort to happen. So, in this instance, 'Registration Class' and then 'Surname'.

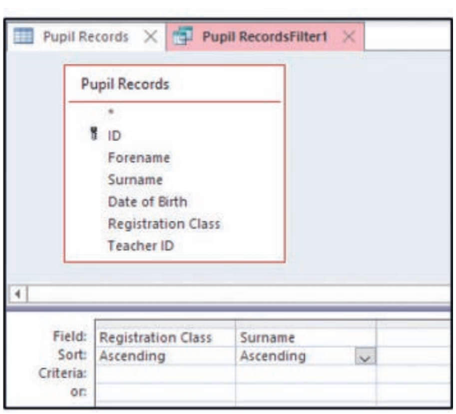
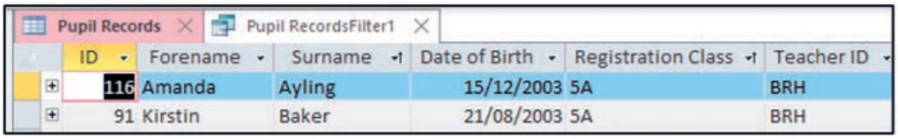


Figure 9.17

Step Three: Select either 'Ascending' or 'Descending' in the 'Sort' cell of the pane for each record. In this instance, both should be set to 'Ascending'. Your screen should look like the image shown.

Step Four: Select 'Advanced' again and then 'Apply Filter/Sort' and your table will be sorted in the order stated.



ID	Forename	Surname	Date of Birth	Registration Class	Teacher ID
116	Amanda	Ayling	15/12/2003	5A	BRH
91	Kirstin	Baker	21/08/2003	5A	BRH

Figure 9.18

TOP TIP

To undo a sort, select 'Remove Sort'.

Figure 9.19

Filtering

Sometimes, not all of the data is required. Deleting it would cause problems later on, so the table should be filtered to show only relevant records. You may be asked to filter on multiple fields.

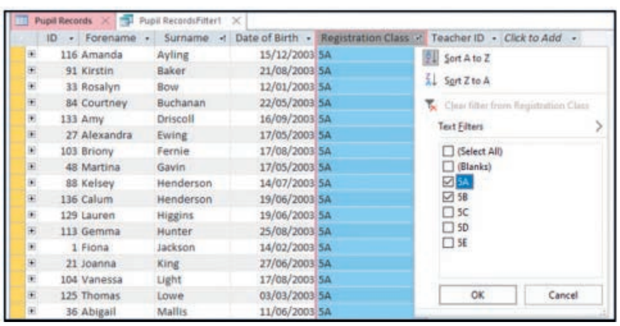


Figure 9.20

Filters can be applied by selecting the drop-down at the field name and selecting only those records/terms you want to show in the table. Select 'Clear Filter' to go back to showing all records.

Forms

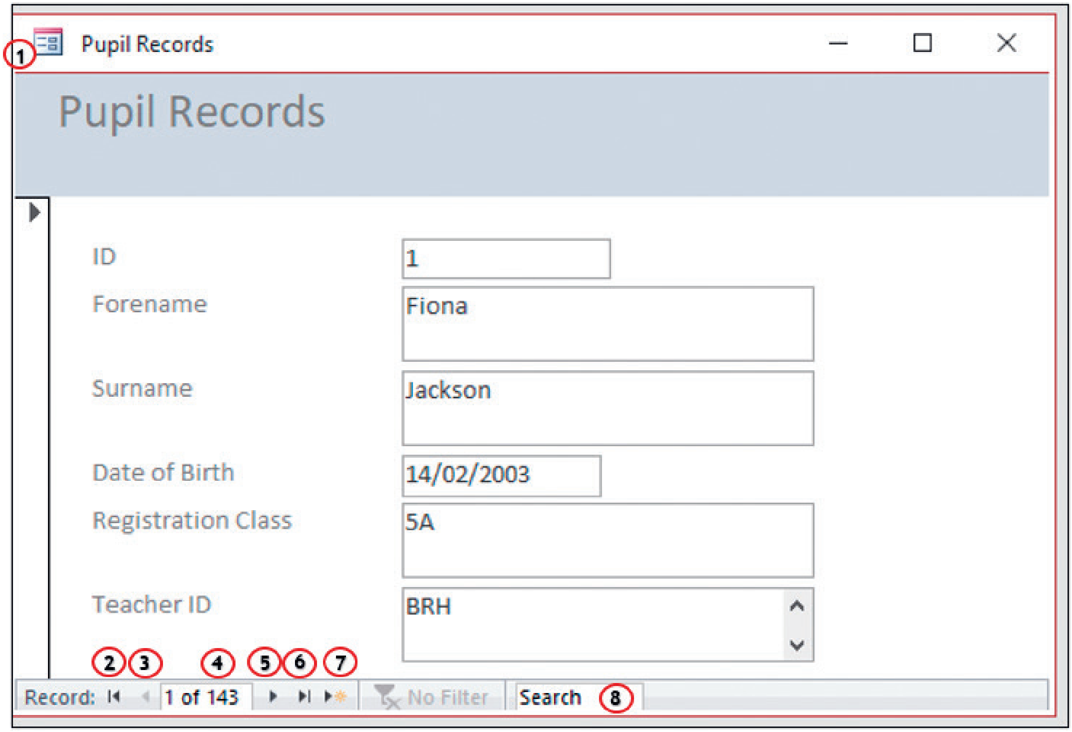
Often when entering large amounts of data into a database using tables, errors can be easily made, including:

- spelling mistakes
- transposing data
- mixing records up
- missing records completely
- duplicating records.

Therefore, it is often easier to input data using a form, which will minimise the risk of the issues occurring. A form is essentially a **digital document** which allows users to enter data into the table one record at a time.

TOP TIP

When using a form, the table must be closed to update the records.



1. Form header
2. Go to first record
3. Go to previous record
4. Total number of records
5. Go to next record
6. Go to last record
7. Create a new record
8. Search for a particular record

Figure 9.21

Creating forms – worked example

The Office Manager at a high school wants a form designed for entering the personal information and subject choices of the students in S5. It should include all of the records from the 'Pupil Records' table as well as list the five subjects they have chosen from the 'Pupil Subjects' table.

Step One: Select the 'Create' ribbon and select 'Form Wizard'. This will take you, step by step, through the process of creating a form (see Figure 9.22).

EXAM TIP

When taking fields from two tables in a form, watch for duplicate fields. If the same field is included in both tables, only bring it over once or you risk losing a mark.

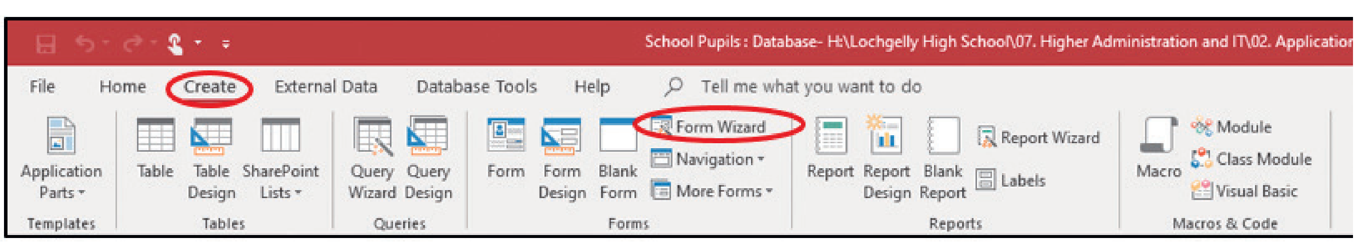


Figure 9.22

Step Two: Select the table (or query) required for the form by selecting the correct one from the drop-down menu. The fields from the table appear at the left. Use the arrows to bring the fields required over to the right. Select the double arrow to bring all fields across.

Step Three: Repeat Step Two for the fields required from the next table needed (Pupil Subjects). It should look like Figure 9.24. Click 'Next'.

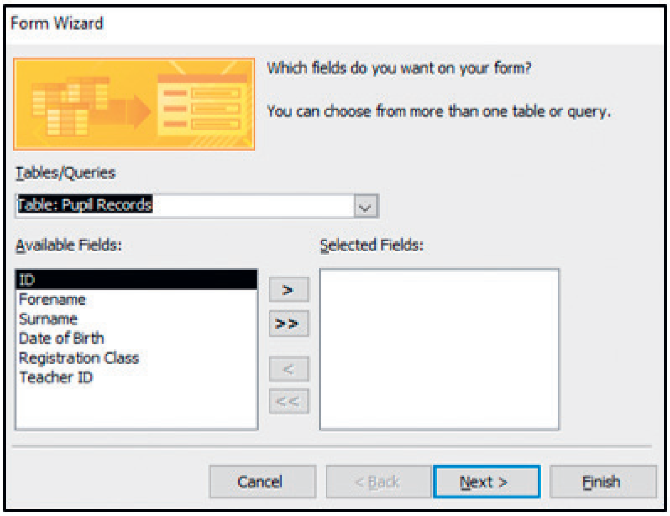


Figure 9.23

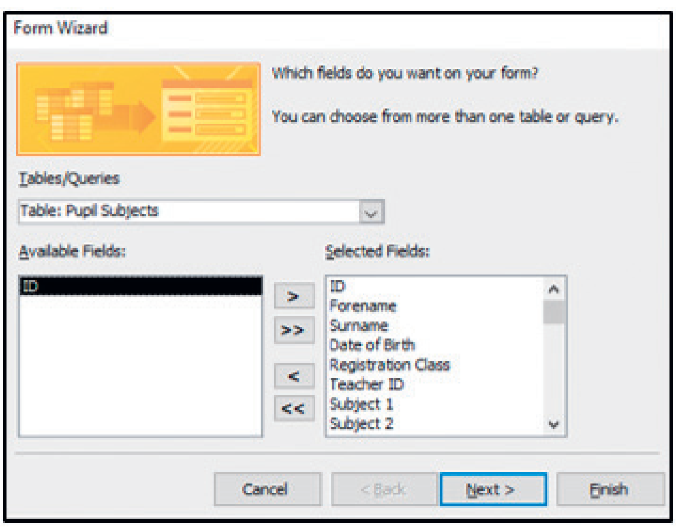


Figure 9.24

TOP TIP

'ID' appears in the 'Pupil Records' and 'Pupil Subjects' tables. Only bring this field over to the 'Selected Fields' pane once, otherwise it will be duplicated. All other fields are required.

Digital resources, consisting of practice tasks and a practice assignment, are available at **www.hoddergibson.co.uk/higher-admin-tasks**

Step Four: The dialogue box will ask about the layout of the form. 'Columnar' is the easiest to navigate and use, so should be opted for the majority of the time. Select 'Next'.

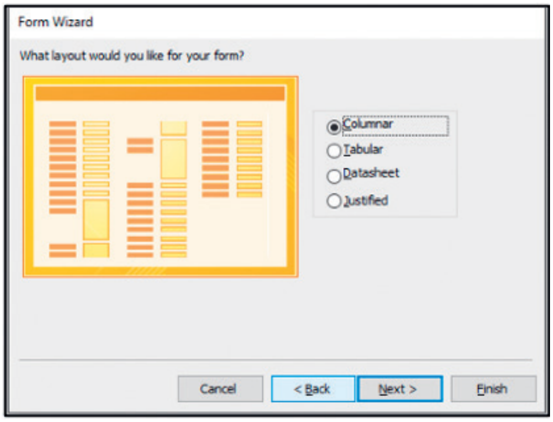


Figure 9.25

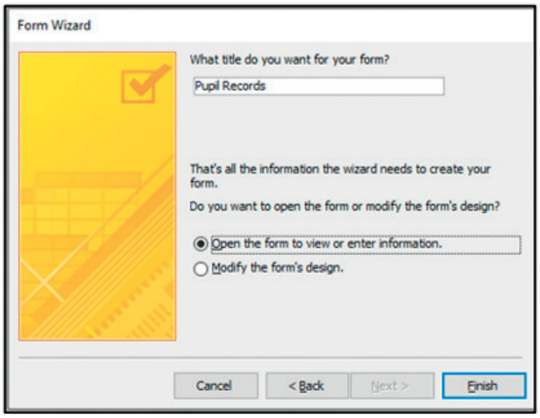


Figure 9.26

TOP TIP

If using tables with a one-to-many relationship, a sub-form will be generated. The steps are identical but will include a 'Datasheet' sub-form containing the records from the other table. Look at the Assignment questions in Twelvetrees or Hebridean Hikers (2017 and 2018).

Step Five: The next screen will ask you to name the form. Access will automatically name this as the name of the table. Read the question carefully to check if it wants a specific name for the form. Select 'Finish'. Your completed form will open (see Figure 9.27).

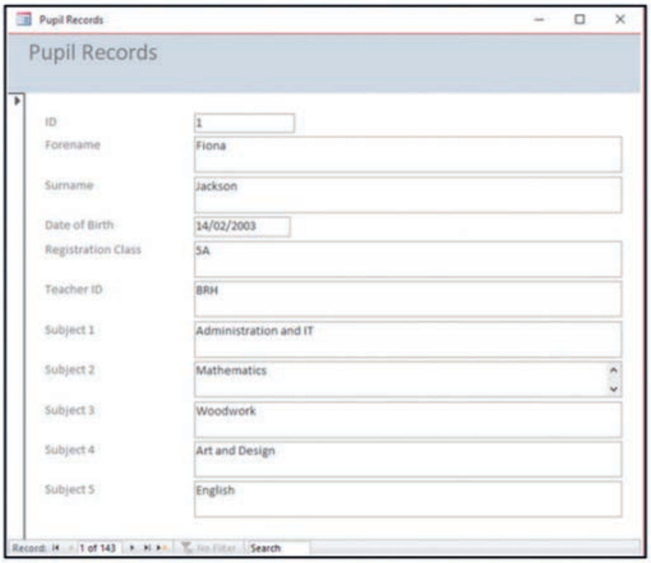


Figure 9.27

Step Six: The form can now be modified or enhanced to improve its appearance. You need to enter 'Design View' to make these changes. To shade the form header, right-click anywhere in the header section. Select the 'Fill/Back Colour' option and then select the colour required.

Figure 9.28

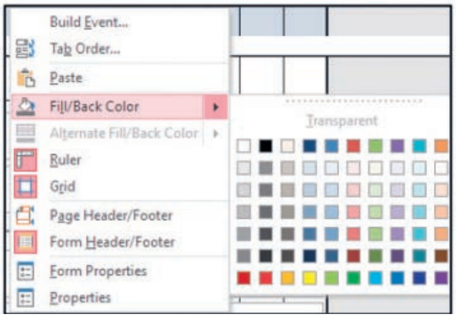


Figure 9.29

Step Seven: The text can also be edited (font, font size, font colour, enhancements, alignment). These changes are made in the 'Form Design Tools' ribbon and by selecting 'Format'.

Figure 9.30

Push 'CTRL' and 'A' and all textboxes will be highlighted. You can then make the changes required using the features shown above.

Figure 9.31

Step Eight: An image or logo can be inserted into the form. On the 'Form Tools' ribbon, select 'Design'. Select the 'Insert Image' icon and search for the image required. You can then 'draw' where it is to be located.

Step Nine: Additional text may be required on the form. Assignments often ask for specific text to be keyed into the 'Form Footer'. You can expand this section by dragging the line under 'Form Footer' down to make space. On the 'Design' ribbon, select 'label (Aa)'. Draw this where required and the text can be entered.

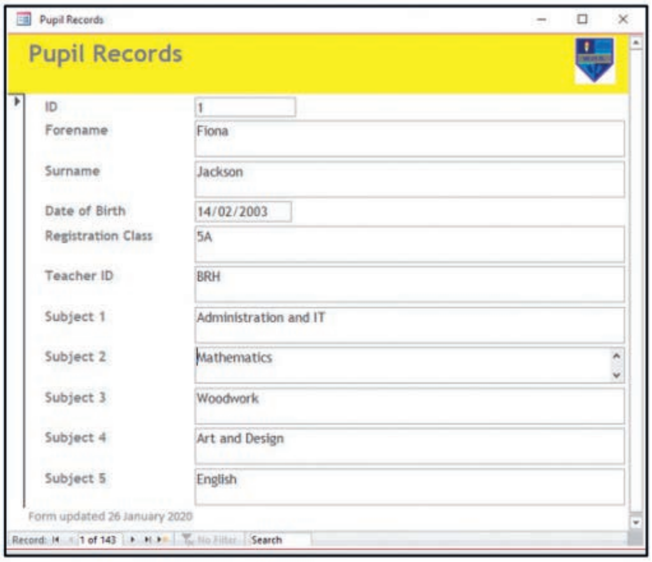


Figure 9.32

Digital resources, consisting of practice tasks and a practice assignment, are available at **www.hoddergibson.co.uk/higher-admin-tasks**

Step Ten: Your name will need to appear on the form printout. Right-click anywhere on the form and select 'Page Header/Footer'. Two new sections will appear. Use 'label (Aa)' again to draw a textbox to enter your name in.

You will need to print only certain record(s) in the Assignment. Make sure you are on the specified record and tick 'Selected Record(s)' in the print box to avoid printing every single record.

Queries and wildcards

As databases contain a vast quantity of data, users often need to pick out particular records which meet certain **conditions or criteria**. These searches are referred to as 'queries' in a database. At Higher, these queries tend to be more complex, requiring different operators and criteria to be used. The table below summarises these with examples.

Criteria	Key in	Example	Will find
To find an exact match for a word.	The word or term you want to find.	'Business Management'	Business Management
To find two criteria within one field.	Criteria AND Criteria	'Accounting' AND 'Business Management'	Accounting and Business Management
To find either of the criteria.	Criteria OR Criteria	'Economics' OR 'Accounting'	Economics or Accounting
To exclude particular records.	NOT criteria	NOT 'Accounting'	All subjects except Accounting.
To search for empty fields.	Is null	Is null	All empty fields.
To search for fields with contents.	Is not null	Is not null	All fields that are not empty or blank.
To find dates before a set date.	←Date	←28/08/19	All dates before 28 August 2019.
To find dates after a set date.	→Date	→28/08/19	All dates after 28 August 2019.
To find dates between a range.	Between date and date	Between 26/08/19 and 28/08/19	All dates including 26/27/28 August 2019.
To find values greater than.	→Value	→2	Values higher than 2.
To find values greater than or equal to.	→=Value	→=2	Values higher than and including 2.
To find values less than.	←Value	←8	Values less than 8.
To find values less than or equal to.	←=Value	←=8	Values lower than and including 8.

Table 9.5 Queries

Queries – worked example

We need a list of Business Management students who have not completed their registration yet. The query should show the First Name and Surname of the student only. Sort this by Surname.

Step One: Select the 'Create' ribbon and then 'Query Design'.

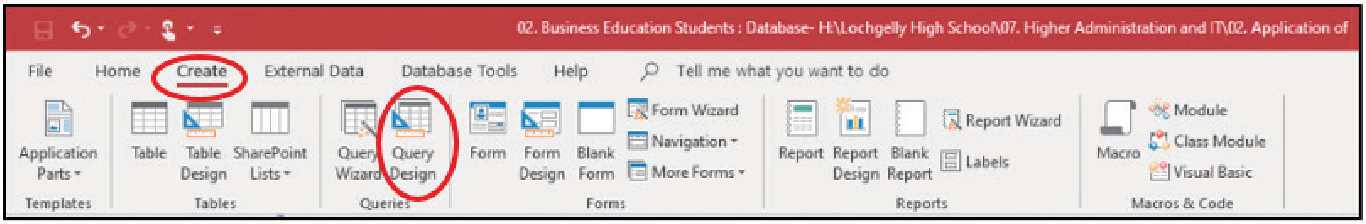


Figure 9.33

Step Two: The 'Add Tables' dialogue box will appear. Double-click each table name so they appear on the screen behind. Close the 'Add Tables' box once the fields have been added.

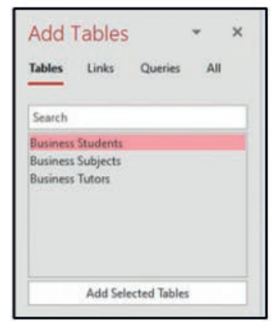


Figure 9.34

Step Three: Bring down the fields required by double-clicking on the fields needed: 'First Name', 'Surname' and 'Completed Registration' from the 'Business Students' table and 'Subject' from the 'Business Subject' table. It is best to break the query down into 'chunks', checking it works each time.

In the 'Criteria' bar underneath 'Subject', key in 'Business Management'. Ensure it is spelt accurately or no results will appear. Select 'Run'. Thirteen records should appear. Select 'Design View' to return to the query.

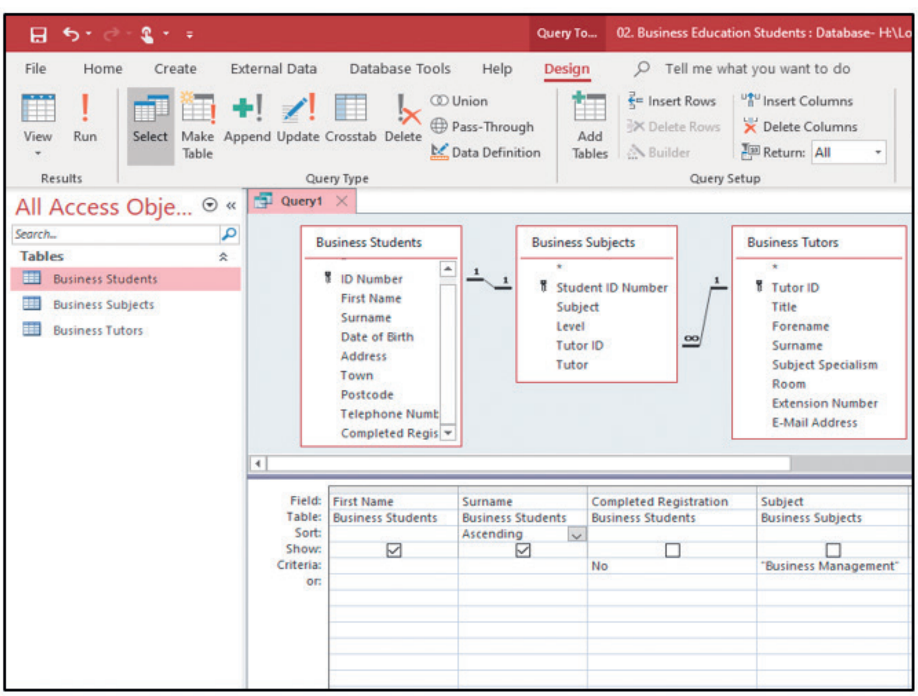


Figure 9.35

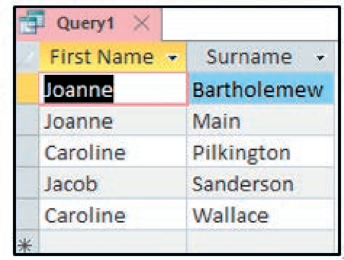
TOP TIP

If you are not using a table within a query, right-click and select 'Remove Table'. If you keep the table, it can often duplicate values, thus skewing your query results.

Step Four: The next condition is those who have not completed their registration. In the criteria bar underneath 'Completed Registration', key in 'No'. Select 'Run'. There are now five records. Select 'Design View' to return to the query.

Step Five: We only want to show the First Name and Surname of the students who meet the criteria. Untick the box under 'Completed Registration' and 'Subject'.

Step Six: The data is to be sorted alphabetically by surname. At the 'Sort' bar under 'Surname', select 'Ascending'. When 'Run' is selected, the results should look like Figure 9.36.


Query1

First Name	Surname
Joanne	Bartholemew
Joanne	Main
Caroline	Pilkington
Jacob	Sanderson
Caroline	Wallace

Figure 9.36

TOP TIP

Do not include currency symbols or commas when querying – it won't work.

Wildcards

Wildcards are used when trying to search for data which may not be entered exactly as expected or if there are additional words included. For example, 'Administration and IT' may be entered as 'Admin' or 'Administration'.

Criteria	Key in	Example	Will find
To find an exact match for a word.	*	Account*	Accounts Accountancy Accounting
		Wood	Practical Woodwork Woodworking Woodwork
To find two criteria within one field.	?	Wh?te	White Whyte Not Whayte
To find either of the criteria.	#	1#1	101, 111, 121. . .

Table 9.6 Wildcards

These tend to be used in fields with 'longer text' where multiple pieces of information are contained within the same field.

Calculated queries

Calculation	Operator
Addition	+
Subtraction	-
Multiplication	*
Division	/

Table 9.7 Operators

Queries can be used to **perform calculations** on the data contained within the database: for example, to calculate the new price for a product after a 10% increase. They can also be used to perform arithmetical calculations using the same operators as a spreadsheet.

A **calculated field** is a field within a query that performs a calculation and displays the results using other fields within the query. The new field is made up of two parts: the 'Name' and the 'Calculation'. The new name must be relevant and follow similar formatting to existing field names. It is then followed by a colon ':' to separate it from the calculation. Existing fields being used in the calculation must be keyed in accurately, with square brackets [FIELD NAME] surrounding them.

Calculated queries – worked example

The figure opposite shows the current price of products at a stationery retailer. They are all entering the sale and will receive a 10% discount. We need to calculate the new price.

Product ID	Description	Price
BI001	Blue Biro 12 Pack	£4.00
BI002	Black Biro 12 Pack	£3.50
BI003	Red Biro 12 Pack	£5.25
ER001	Eraser 10 Pack	£8.20
HI001	Highlighter 6 Pack	£6.50
PE001	HB Pencil 12 Pack	£7.50
SH001	Sharpener 5 Pack	£9.50
ST001	Stapler	£11.00

Figure 9.37

Step One: Select 'Create' and 'Query Design'. Add the correct table and bring down all of the fields.

Step Two: In the first blank 'Field', you need to create the 'Calculated Field'. It must be given a suitable name, which reflects its contents. As the product is receiving a 10% discount, the customer is therefore paying 90% of the original price. This can be expressed as 0.9 as a decimal. The new field name would look like:

Discounted Price:[Price]*0.9

Key in the calculated field above. Select 'Run' to check that the calculation has worked. Any errors will result in the calculation not working so always check! The issue now is that the field is displaying numerical values and not currency.

Step Three: Return to 'Design View'. Click on the calculated field and select 'Property Sheet' on the 'Design' ribbon. A pane will appear at the right-hand side. At 'Format', select 'Currency'. When you select 'Run', your results will now be shown as currency.

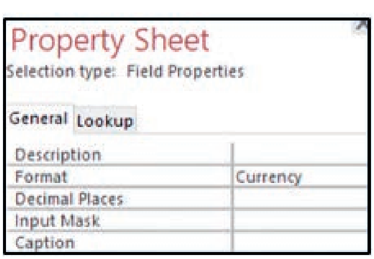


Figure 9.38

Digital resources, consisting of practice tasks and a practice assignment, are available at **www.hoddergibson.co.uk/higher-admin-tasks**

Product ID	Description	Price	Discounted Price
BI001	Blue Biro 12 Pack	£4.00	£3.60
BI002	Black Biro 12 Pack	£3.50	£3.15
BI003	Red Biro 12 Pack	£5.25	£4.73
ER001	Eraser 10 Pack	£8.20	£7.38
HI001	Highlighter 6 Pack	£6.50	£5.85
PE001	HB Pencil 12 Pack	£7.50	£6.75
SH001	Sharpener 5 Pack	£9.50	£8.55
ST001	Stapler	£11.00	£9.90

Figure 9.39

The same steps are involved regardless of the calculated field – addition, subtraction, multiplication or division.

The important thing to remember is that the 'syntax' must be keyed in accurately for it to work.

TOP TIP

If there is a percentage INCREASE of, for example, 10%, multiply by 1.1 – the whole 1 represents 100% and the 0.1 represents the 10% increase.

Aggregate queries (functions)

Aggregate queries (another word for 'Totals') allows calculations to be carried out on '**grouped**' data. The aggregates or totals that are used are:

- **MIN**: Will find the lowest value from the grouped data.
- **MAX**: Will find the highest value from the grouped data.
- **SUM**: Will calculate the total value for all grouped data.
- **COUNT**: Will determine how many records belong to the group.
- **AVERAGE**: Will calculate the group average from the data.

Similar to calculated queries, the new field needs to be named appropriately. Access will automatically rename the aggregate query field with a name which represents the aggregate that has been used. For example: SumofUnits in Stock. This tells you that the aggregate used was SUM and that the Units in Stock is what has been grouped. At Higher level, this is not acceptable, and you will lose the mark. The new field must be named appropriately based on its contents.

Figure 9.40

Key rules to follow with aggregates are as follows:

- Ensure you select the 'Totals' icon before conducting an aggregate query.
- Ensure you are not carrying down too many fields. You only want to show what the question is asking you for.
- Ensure your fields are labelled properly. For example, if you have used 'Count', ensure you have the field which tells you what you have counted.
- Always rename your aggregate query field to a meaningful name.

Aggregate queries – worked example

Figure 9.41 shows the sales revenue generated by each employee. We want to find the total generated by branch.

Employee ID	Branch	Sales Revenue
1	Kirkcaldy	£1,500.00
2	Glenrothes	£1,200.00
3	Dunfermline	£850.00
4	Kirkcaldy	£950.00
5	Glenrothes	£2,500.00
6	Glenrothes	£1,300.00
7	Glenrothes	£750.00
8	Kirkcaldy	£800.00
9	Dunfermline	£950.00

Figure 9.41

Step One: Set up your query as normal. Select the 'Totals' icon.

Step Two: Bring down the field which will 'Group' the data. In this example, it is 'Branch', as we want the total revenue generated for each branch.

Step Three: Bring down the field you want to aggregate. This is Sales Revenue. On the 'Total' line, select 'SUM'. Click 'Run' and it will total the sales for each branch.

Step Four: Return to 'Design View' and rename your aggregate field. The 'new name' comes first, followed by a colon and the 'Sales Revenue' field name in square brackets. Click 'Run' and your calculated query is complete.

Field:	Branch	Total Sales:[Sales Revenue]
Table:	Aggregate Example	Aggregate Example
Total:	Group By	Sum
Sort:		
Show:	☑	☑
Criteria:		
or:		

Figure 9.42

Branch	Total Sales
Dunfermline	£1,800.00
Glenrothes	£5,750.00
Kirkcaldy	£3,250.00

Figure 9.43

TOP TIP

The field you want to 'Group' on must always be brought down first, otherwise the aggregate query will not be meaningful.

Reports

Reports allow data contained within tables or queries to be presented in a professional and more meaningful manner. Reports are **dynamic**, meaning if data in tables changes, the report will change automatically. **Calculations** can also be carried out in reports to make them more meaningful. In the Assignment, reports are generally created after a query has been calculated.

Reports – worked example

Figure 9.44 shows the sales revenue generated by each employee from three branches. This data is to be presented in a report.

Employee ID	Employee Name	Branch	Sales Revenue
1	Dawson, K	Kirkcaldy	£1,500.00
2	Matthews, R	Glenrothes	£1,200.00
3	Foley, G	Dunfermline	£850.00
4	Boyd, M	Kirkcaldy	£950.00
5	Silver, M	Glenrothes	£2,500.00
6	Spencer, W	Glenrothes	£1,300.00
7	Roddick, J	Glenrothes	£750.00
8	Heath, P	Kirkcaldy	£800.00
9	Brown T	Dunfermline	£950.00

Figure 9.44

Step One: Select the 'Create' ribbon and then select 'Report Wizard'.

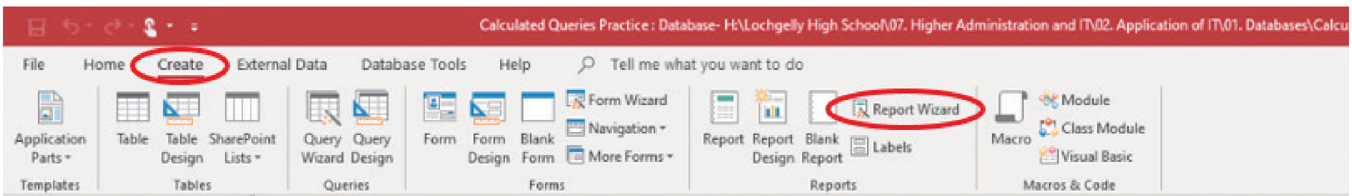


Figure 9.45

Step Two: Select the table or query required from the drop-down menu. Bring over the fields required using the arrows (similar to creating a form). Once all of the fields are over, select 'Next'.

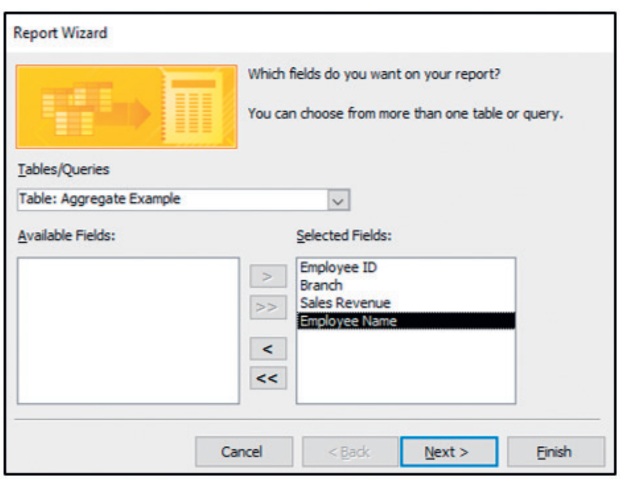


Figure 9.46

Step Three: The next dialogue box refers to 'Grouping'. This means that records with the same common field will be grouped together. The grouped field will appear first on the report and they will appear in alphabetical order. Select 'Branch' and then 'Next'.

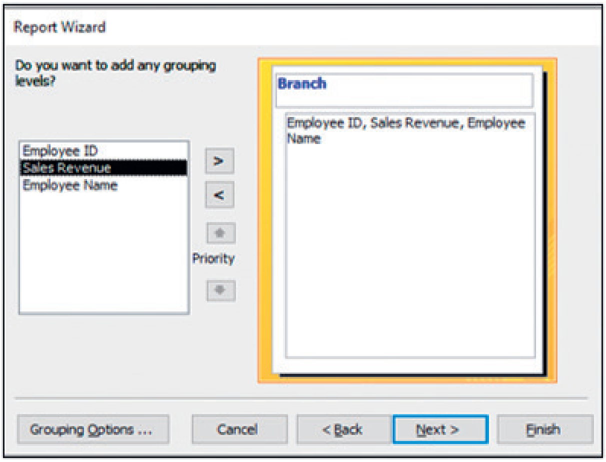


Figure 9.47

Step Four: The next dialogue box refers to 'Sorting'. This means putting the data into some form of order in the 'Groups' from the previous box. Select 'Employee Name' from the drop-down and ensure it is set to 'Ascending'. This means that for each Branch, the employees will be listed in alphabetical order of name.

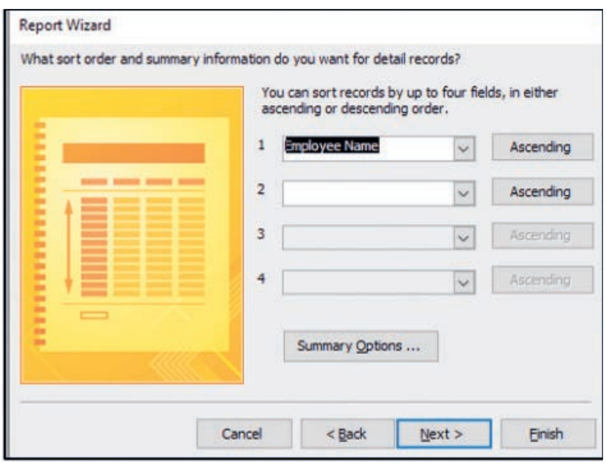


Figure 9.48

Step Five: On the same dialogue box, there is a box stating, 'Summary Options …'. These allow us to include aggregates or totals in our report based on certain fields. We want to include the total sales generated by each branch. Select the 'Summary Options …' box. For 'Sales Revenue', tick the box for 'SUM', which will return the total. Click 'OK' and then 'Next' on the original box.

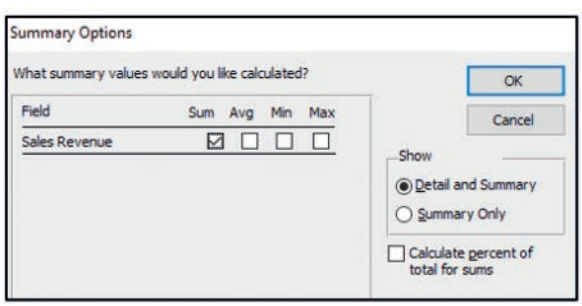


Figure 9.49

Step Six: The next dialogue box refers to layout and orientation. Leave the 'Layout' as 'Stepped'. Read the question again to check which page orientation the report should be. It is far easier to change it here than once the report is produced. Select 'Next'.

Step Seven: The final dialogue box asks for the name of the report. Read the question carefully to check if there are any requirements. Be as specific as possible to ensure you get the mark. Click 'Finish' and your report is created.

Modifying and enhancing a report

Reports can be modified and enhanced similarly to a form. To check how to change the font, include colour, add a graphic or insert headers/footers, refer to pages 118–119.

The fields in the report may need to be moved into a specific order or to be resized. Select the relevant fields and hold down the CTRL button. You can then select other fields you want to be moved and resized at the same time. Make use of the sizing and ordering options to keep your report looking professional.

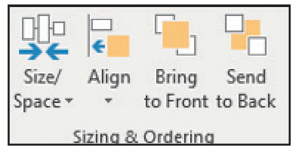


Figure 9.50

Summary options

On your report, the 'Detail' of the SUM summary option is visible (the long calculation). You must delete this in Design View. You should also rename the 'SUM' label to something more meaningful, such as Total per Branch.

'COUNT' is not an option in the 'Summary Options' section of the Report Wizard. In this example, we want to find out how many individuals work in each branch.

Step One: In Design View, click on the 'Employee Name' label under 'Detail'. Ensure you are on the 'Design' ribbon and select the 'Totals' drop-down. Select 'Count Values'.

This now counts how many employees work in each branch.

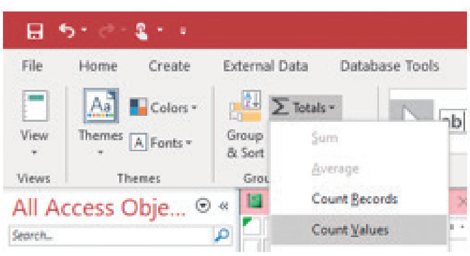
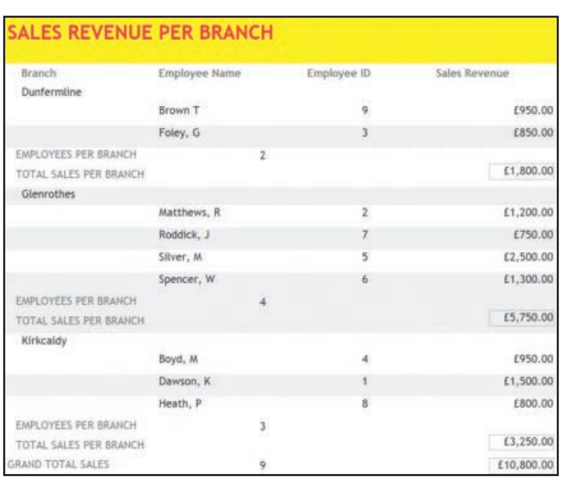


Figure 9.51

Step Two: Add a label (Aa) next to the label with the 'COUNT' and label it appropriately.



SALES REVENUE PER BRANCH

Branch	Employee Name	Employee ID	Sales Revenue
Dunfermline			
	Brown T	9	£950.00
	Foley, G	3	£850.00
EMPLOYEES PER BRANCH	2		
TOTAL SALES PER BRANCH			£1,800.00
Glenrothes			
	Matthews, R	2	£1,200.00
	Roddick, J	7	£750.00
	Silver, M	5	£2,500.00
	Spencer, W	6	£1,300.00
EMPLOYEES PER BRANCH	4		
TOTAL SALES PER BRANCH			£5,750.00
Kirkcaldy			
	Boyd, M	4	£950.00
	Dawson, K	1	£1,500.00
	Heath, P	8	£800.00
EMPLOYEES PER BRANCH	3		
TOTAL SALES PER BRANCH			£3,250.00
GRAND TOTAL SALES	9		£10,800.00

Figure 9.52

EXAM TIP

Keep going to 'Print Preview' of the report after each minor change to check how it looks. Be careful that fields are not truncated as this will lose you marks.

Reports can be worth between 8 and 11 marks, so it is important you do not lose marks for minor errors.

Presentation is key.

Exporting data and printing

When printing tasks from Access, not all of them are directly printed from the software itself. Tables and queries must be exported to either Word or Excel, while forms and reports are printed directly from Access.

Tables and queries

Your name/SCN number and task cannot be easily added to a table or query printed directly from Access. Therefore, your response should be exported to Word or Excel. This example will talk you through Word, but the steps for Excel are identical.

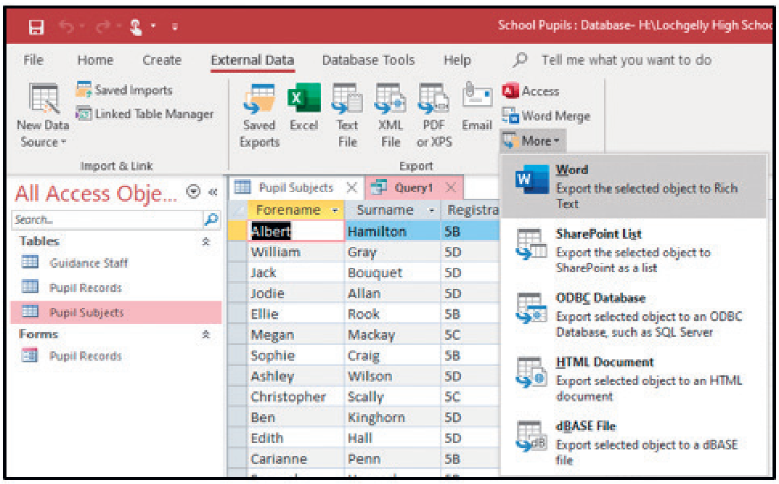


Figure 9.53

Step One: Check that you have fully answered the question. In 'Datasheet View', select the 'External Data' ribbon. Go to 'More' and select 'Word' from the drop-down menu.

Step Two: Select 'Browse' and find where you want to save the file. Ensure the middle tick box is selected so the file will open ready. Select 'OK'.

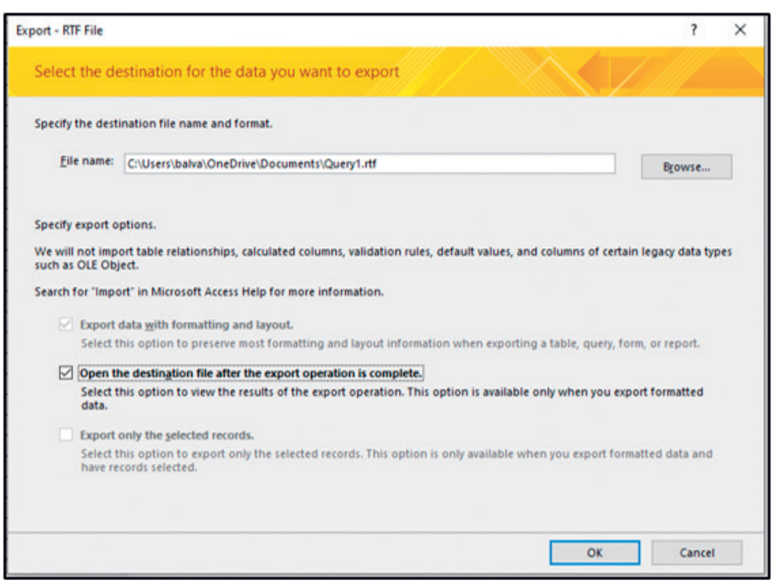


Figure 9.54

Step Three: The Word document with the results of the table/query will open. The text may need to be resized or the orientation of the document changed so that it fits on one page and is all visible. Add your Name/SCN Number and the task number to a footer and print.

Forms

Forms are printed directly from Access. Ensure your name/SCN number/task number is added as a 'Page Footer'.

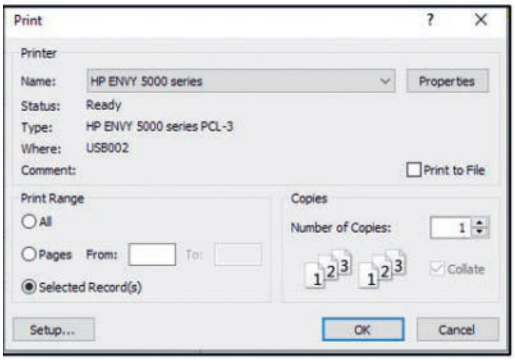


Figure 9.55

TOP TIP

- If reports go wrong, sometimes it is quicker if you start from scratch.
- Entire tables or queries can be copied and pasted into Word or PowerPoint.

EXAM TIP

You will never be asked to print all records in the Assignment (sometimes there are hundreds), so ensure you always tick 'Selected Records' before printing.

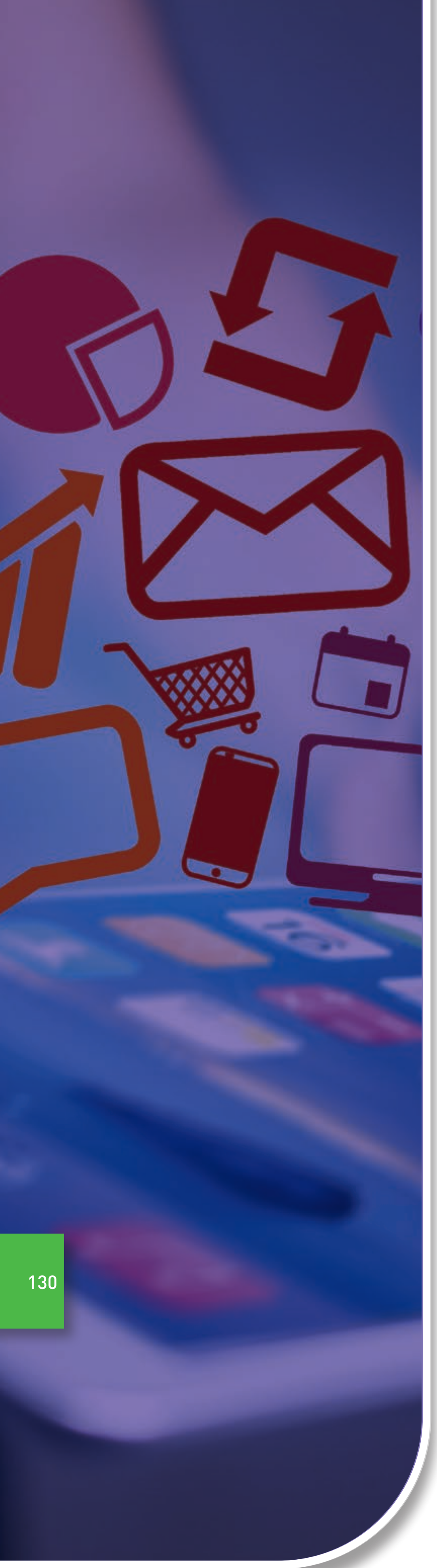
Reports

Reports are also printed directly from Access. Ensure all text is free from **truncation** and that the appearance is professional.

EXAM TIP

Make the most of your printing time by checking your printouts carefully. Many marks are lost for minor errors such as truncation or capitalisation mistakes.

The key with database printouts is that they all look professional and are readable.



Chapter 10 Word processing

Introduction to word processing

Organisations need to be able to produce business documents to a high standard to portray the right image to customers, suppliers and other stakeholders. Microsoft Word is a software package which is used to produce **business documents**.

Figure 10.1 Microsoft Word logo

Advantages of using word processing include the following:

- Text can be keyed in once and then reused in different documents.
- Documents can easily be drafted and redrafted without having to restart.
- Documents can be created that follow the house style in terms of layout and formatting.
- Data can be integrated into other applications.
- Templates can be downloaded and used to look professional.
- Copies of documents can be saved electronically.

The Home ribbon

Figure 10.2

Font	Paragraph	Styles
• Allows you to make changes to the appearance of text. • Font/font size/font colour. • Text formats: bold/italics. • Highlighter tool.	• Allows you to make changes to the layout of text. • Bullets and numbering. • Alignment and indentation. • Borders and shading.	• Allows you to establish and format headings and subheadings. • Font. • Text formats. • Line spacing.

Table 10.1 The Home ribbon

Margins and line spacing

The margins of the document set the size of the page that can be edited and where text can be entered. These can be increased or decreased to allow for text to fit on one page or to meet the requirements of the question.

Step One: Select the 'Layout' ribbon. 'Margins' is the first option. Select the drop-down.

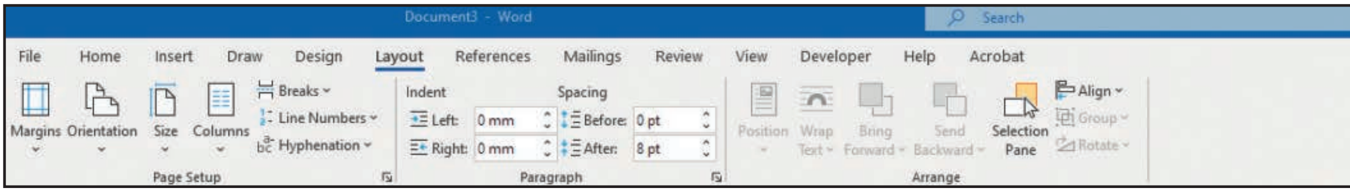


Figure 10.3

Step Two: You can either select the pre-determined margins or select 'Custom Margins' to enter a specific value. Click 'OK' and the margins of your document are amended.

Line spacing relates to the gap between lines within a page. To format the line spacing of a paragraph, simply highlight the required text, right-click and select 'Paragraph'. You can then select the required line spacing from the drop-down under 'Spacing' (Figure 10.4).

Figure 10.4

Manuscript corrections

Documents must be **proofread** for errors or changes before being issued to internal or external stakeholders. Multiple drafts of the document will be created before the final version is issued. Manuscript correction signs are used on draft versions of documents to indicate changes or errors within the document. The administrator would then need to make the necessary changes to the document. Figure 10.5 summarises these corrections.

Sign (in margin)	Example error	Correction
Lc	Accuracy is very Important in a document.	Lower case Change capital letter to small letter.
Uc	BA are the initials of British airways.	Upper case Change small letter into a capital letter.
Np	… end of the year. [The next year …	New paragraph New paragraph begins at the point indicated by [.
run on	… sales increased significantly. This is explained …	Run on Join the two paragraphs together linked by the arrow.
trs	Century 21st English Administration	Transpose Change the order of the items either vertically or horizontally.
/	The most popular ~~new~~ car is silver or black.	Delete Leave out the word(s) that have been crossed out.
new	Training will be arranged for the scanner.	Insert Include the word(s)/letter(s) symbol(s) indicated.
close up	The course was very successful.	Close up Reduce the amount of space between the words.
#	The computer system#hard drive, keyboard, and …	Space Insert a space where there is not currently one.
stet	I disagree with the ~~decision~~ ~~stet~~	Stet (let it stand) When both words have been crossed out, use the dotted word.
efficacious	The school is eficacious.	Unclear/inaccurate Used to highlight an inaccurate or unclear term or phrase.
in full	Bed & Breakfast	In full Change the underlined abbreviation to the full meaning.
operator	OPERATOR Change margins to 2.5 cm	Margins/operator Change the margins of the entire document to the stipulated size.
u/s	Business Education	Underline/underscore Apply the underline feature to the term underlined.
bold	The new post will be a permanent position.	Embolden Apply the bold feature to the word underlined.
italics	Please delete as appropriate.	Italicise Apply the italics feature to the word underlined.

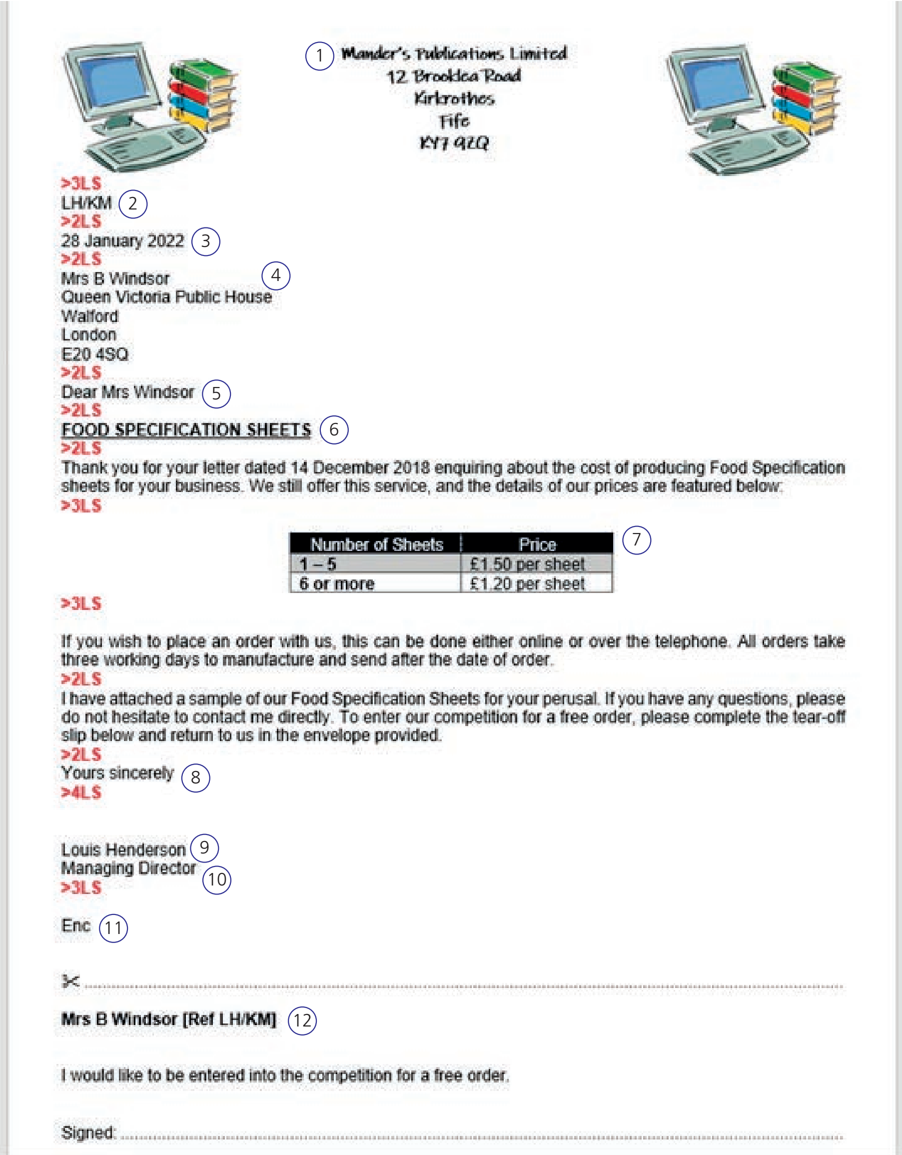
Figure 10.5 Proofreading mark-up symbols

Creating business documents

In the Assignment, you may be asked to complete partially completed business documents. These must follow the '**house style**' of the document. This means it must be prepared following specific rules regarding the layout and formatting of the document. These rules may vary from one exam centre to another, but the documents below meet the SQA standards.

Business letters

Business letters are **formal communications** between the organisation and an external stakeholder, such as a customer or supplier. Formal language should be used throughout.



1 Mander's Publications Limited
12 Brooklea Road
Kirkrothes
Fife
KY7 9ZQ

>3LS
LH/KM 2
>2LS
28 January 2022 3
>2LS
Mrs B Windsor 4
Queen Victoria Public House
Walford
London
E20 4SQ
>2LS
Dear Mrs Windsor 5
>2LS
FOOD SPECIFICATION SHEETS 6
>2LS
Thank you for your letter dated 14 December 2018 enquiring about the cost of producing Food Specification sheets for your business. We still offer this service, and the details of our prices are featured below:
>3LS

Number of Sheets	Price
1 – 5	£1.50 per sheet
6 or more	£1.20 per sheet

7

>3LS
If you wish to place an order with us, this can be done either online or over the telephone. All orders take three working days to manufacture and send after the date of order.
>2LS
I have attached a sample of our Food Specification Sheets for your perusal. If you have any questions, please do not hesitate to contact me directly. To enter our competition for a free order, please complete the tear-off slip below and return to us in the envelope provided.
>2LS
Yours sincerely 8
>4LS

Louis Henderson 9
Managing Director 10
>3LS

Enc 11

✂ ....

Mrs B Windsor [Ref LH/KM] 12

I would like to be entered into the competition for a free order.

Signed: ....

Figure 10.6

1	**Letterhead**: Usually located in an additional document. Name and address of the sender. Enhanced/different font.
2	**Reference**: Unique to the letter. Made up of the initials of the sender of the letter followed by the typist/administrator.
3	**Date**: Date the letter was produced. Must be in full (with or without day). Do not include ordinals for number (st, nd, rd ...).
4	**Recipient address**: Full address of the recipient for the letter. Each detail should be keyed in on a new line.
5	**Salutation**: The 'opening' of the letter, with no comma. Use 'Dear Sir or Madam' if the recipient's name is unknown/generic.
6	**Subject**: Content/topic of the letter. Should be enhanced (block capitals, bold and underlined).
7	**Display**: Information displayed in a table or a bulleted list is referred to as this. Enhanced appropriately. ➜

8	**Complimentary close**: Close of letter with no comma. Dear Mrs Windsor = 'Yours sincerely' Dear Sir or Madam = 'Yours faithfully'
9	**Name of signatory**: The full name of the sender of the letter. Check the question carefully to see who this is.
10	**Designation**: Job title of the sender. This may be given in the introductory pages of the Assignment paper.
11	**Enclosure**: Used if the letter references additional documents 'attached' or 'enclosed' to indicate additional documents enclosed.
12	**Tear-off slip**: Occasionally included if the recipient is to give a response. A tab should be used for the serrated line.

Table 10.2 Business letters

EXAM TIP

In some instances (like 2015 – Island Secondary School) the letter was generic. Therefore, there was no 'Recipient Address'. In cases like these, leave out the address section and open the letter with 'Dear Sir or Madam'. Check the question carefully to see who the recipient is.

Itineraries

An itinerary is a **programme of events** for a business trip which lists all travel and accommodation arrangements in date and time order. It will provide the traveller with a step-by-step guide to their trip with key information also included.

1	**Trip title**: The itinerary should have a suitable heading summarising the purpose of the trip. Must be enhanced.
2	**Trip destination**: Unique to the letter. Made up of the initials of the sender of the letter followed by the typist/ administrator.
3	**Name of traveller**: Name of the individual the itinerary is being produced for.
4	**Date(s) of travel**: Date(s) the trip runs on. Must be in full (with or without day). Do not include ordinals for number (st, nd, rd ...).

Table 10.3 Itineraries

TOP TIP

Use a table when preparing an itinerary. This will help with the layout, in addition to making it look more professional.

Key points about itineraries:

- They must be in chronological order.
- They must be double line spaced throughout.
- They must be recorded in 24-hour clock.

EXAM TIP

You may also be asked to prepare a notice of meeting and agenda or meeting minutes in the Assignment (see the theory chapter on Meetings).

The majority of word processing tasks in the Assignment, however, tend to be generic large documents to edit.

ITINERARY FOR HIGHER ADMINISTRATION AND IT TRAINING COURSE	
TRIP TO:	SQA Headquarters, Dalkeith
NAME OF TRAVELLER:	Mr Lee Hepburn, Teacher of Business Education
DATE OF TRAVEL:	Monday 1 February 2022

TIME	DETAILS
0630 hours	Taxi from home to Markinch Train Station
0711 hours	Train departs from Markinch to Edinburgh Waverley
0804 hours	Train arrives at Edinburgh Waverley
0823 hours	Train departs from Edinburgh Waverley to Eskbank
0841 hours	Train arrives at Eskbank Train Station
0845 hours	Taxi from Eskbank Train Station to Dalkeith House
0855 hours	Arrive at Dalkeith House and sign in at Reception
0900 hours	Training Session begins - Marking National 5 Administration and IT
1200 hours	Lunch provided in Dalkeith House
1300 hours	Training Session resumes - Marking National 5 Administration and IT
1500 hours	Training Session ends
1515 hours	Taxi from Dalkeith House to Eskbank Train Station
1525 hours	Arrive at Eskbank Train Station
1534 hours	Train departs from Eskbank to Edinburgh Waverley
1552 hours	Train arrives at Edinburgh Waverley
1558 hours	Train departs from Edinburgh Waverley to Markinch
1646 hours	Train arrives at Markinch Train Station
1650 hours	Taxi from Markinch Train Station to Home

Figure 10.7 Example itinerary

Styles gallery

The styles gallery is accessed on the 'Home' ribbon and has a series of built-in headings with **formatting already applied**. There are various styles for different purposes, but they are mainly used for headings and sub-headings. All headings and sub-headings should be formatted consistently throughout your document.

The use of the styles gallery brings multiple advantages, including the following:

- It saves time (which is precious in the Assignment) as you only need to make formatting changes to the headings or sub-headings once.
- It makes documents appear more professional as the formatting applied is consistent throughout the document.
- It allows for other functions of Microsoft Word to be used relatively simply, such as a table of contents.

Not only do styles improve the appearance of your document by ensuring the formatting is consistent, but they also allow you to use **referencing features** of Microsoft Word such as a table of contents.

Using styles

Step One: Select all of the headings or sub-headings (use a different style for each – albeit with similar formatting). On the 'Home' ribbon, select the style required.

Figure 10.8

Modifying styles

You can also modify (or change) the styles in Word to suit personal preference or to meet the stipulation of the question.

Step One: Right-click on the style required and select 'Modify'. A dialogue box will appear.

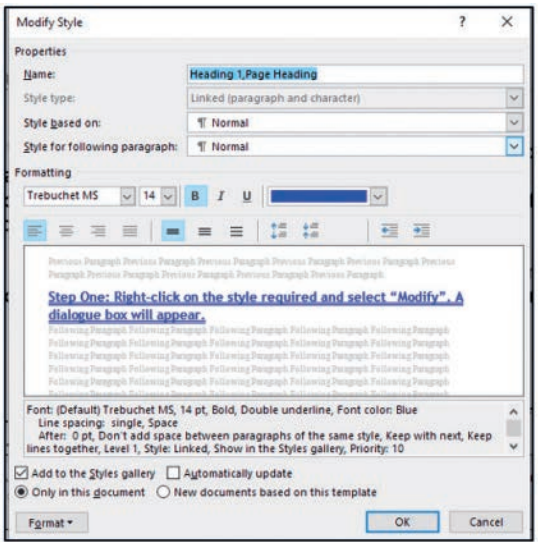


Figure 10.9

Step Two: At this stage you can format the appearance of the text including the font, font size, font colour, formatting and the alignment. It may also be useful to 'Name' the style for ease of use throughout the question.

Step Three: To format the line spacing or apply more specific formatting techniques, select the 'Format' drop-down and make the necessary changes.

Step Four: Select 'OK' and your newly modified 'Style' will appear in the gallery. You can then select this for use throughout your document.

Breaks and page layout

When working with large documents, it can often be the case that their appearance and layout need to be amended to look more professional and to suit the needs of the document. Breaks can be used to insert sections into the document, which makes it easier to format or change particular sections of the document, while retaining the original formatting elsewhere.

Page and section breaks

Documents should be presented professionally and make the best use of the space available. For example, one line from a paragraph should not appear on the next page completely on its own.

As Microsoft Word automatically moves onto the next page once the first page is 'full' it can lead to text jumping from page to page if sections are removed or amended. This can result in documents appearing unprofessional. Therefore, breaks can be applied that move to either the next page or next section of the document.

Breaks can be inserted by selecting the 'Layout' ribbon and selecting the appropriate break from the drop- down list. Insert a break at the bottom of the current page you are working on.

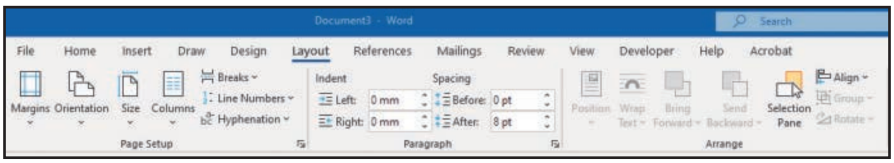


Figure 10.10

Page breaks			Section breaks			
Page	**Column**	**Text wrapping**	**Next page**	**Continuous**	**Even page**	**Odd page**
Move to the next page in the document.	If set as columns, move to the next column.	Used to wrap text around tables or graphics.	Creates a new section in the document on the next page.	Inserts a section break on the same page.	Creates a new section on the next even page.	Creates a new section on the next odd page.

Table 10.4 Page and section breaks

Alternate page orientations

Page orientation relates to the direction in which a document is printed or displayed, either in **portrait** or **landscape**. In the Assignment, you are often asked to change a specified page within the same document to a different page orientation (portrait or landscape) while keeping the rest in the opposite orientation.

Figure 10.11

Step One: Click at the bottom of the current page (that you want to keep in the existing orientation).

Step Two: Select the 'Layout' ribbon.

Step Three: Select the 'Breaks' icon to open the drop-down menu.

Step Four: Go to 'Section Breaks' and select 'Next Page'.

Step Five: A new page should follow the current page in the document. Ensure your cursor is on this 'new' page.

Step Six: Still on the 'Layout' ribbon, select the 'Orientation' icon and select the orientation required. That page, and that page only, will now be in that orientation.

Step Seven: If the following page is to revert back to the original orientation, repeat the above steps and select the opposite page orientation.

TOP TIP

To remove an unwanted page break, select the 'Show/Hide' icon found in the 'Home' ribbon. This will show features of the page layout that do not show up on the printout – such as 'Breaks'. Simply remove the break and the page will disappear.

Headers and footers

Headers are the area at the top of the page and footers are the area at the bottom of the page that allow text to be keyed in. This can be identical on every page of the document or, in the majority of cases, can vary from section to section.

> **EXAM TIP**
>
> Right-click to access the header or footer. By inserting a new header or footer, you will delete any text that has already been keyed into the document – losing you a print mark.

The addition of section breaks allows the content of headers or footers to vary depending on the section of the document you are working in.

Once you have added section breaks to your document and are editing the header/footer, it is important you deselect the '**Link to Previous**' box if you want the content to vary or be different from section to section. Otherwise, all of your headers or footers will be identical.

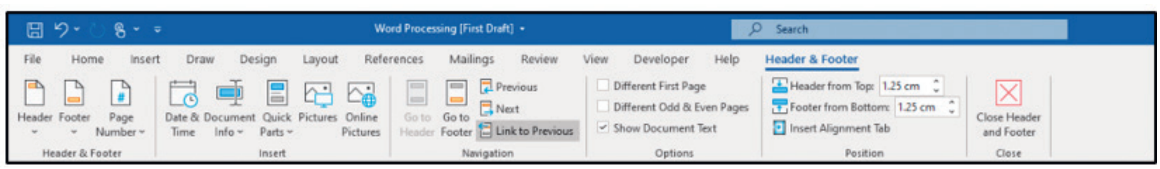


Figure 10.12

Different odd and even pages

The Assignment quite often asks for certain content to appear only on 'Odd' pages or 'Even' pages. To do this, make sure you are in the 'Header and Footer' ribbon and select the tick box 'Different Odd and Even Pages'.

Different on first page

The first page of a document in Higher Administration and IT tends to be a title page. This (and the contents pages) should not include page numbers and tend not have a header and/or footer. To do this, make sure you are in the 'Header and Footer' ribbon and select the tick box 'Different First Page'.

Title pages

To include a title page in a document, place your cursor at the beginning of the first word, on the first page of the document. Go to 'Layout', then 'Breaks' and insert a 'Next Page' break. The title page should always be enhanced and make full use of the page. This can be done by selecting the 'Insert' ribbon and then 'Cover Page' to include a pre-formatted title page. However, this can also be done manually and should include a variety of formatting techniques, a larger font, a graphic if stipulated and perhaps a border.

To add a **border** on the title page only (after a 'Next Page' break has been applied), follow the steps below.

Step One: Ensure you are on the title page. Select the 'Design' ribbon and select 'Page Borders'.

Figure 10.13

Step Two: The following dialogue box will appear. At 'Apply to', select 'This section – First page only'. This will only put a border on the title page.

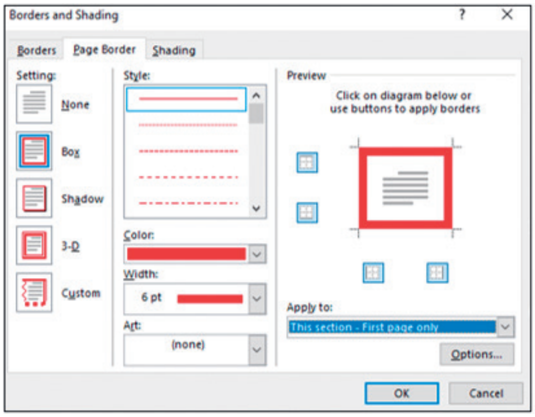


Figure 10.14 Caption to follow

Step Three: Select the border required and format appropriately. Select 'OK' and your border will appear on the title page only.

References

The 'References' ribbon allows you to make references throughout large documents including tables of contents, endnotes, footnotes, bookmarks and cross-references.

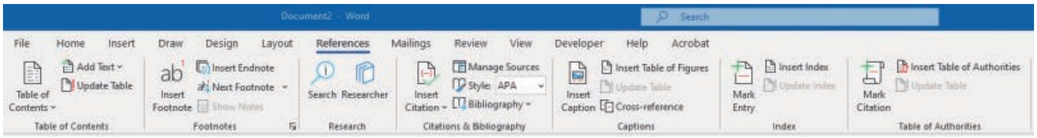


Figure 10.15

Table of contents

A table of contents is a dynamic feature of Word which, once styles have been applied, allows the user to navigate easily through the document. It will record the title of the page in **chronological order** and will be **hyperlinked** to the document, meaning the user can click on the relevant section and be brought to the page.

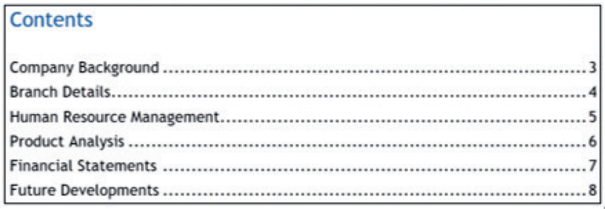

Contents

Figure 10.16

Step One: Ensure all sections of the document have headings and/or sub-headings set up from the 'Styles' gallery using Heading 1, 2 or 3 (these can be modified). If a section heading does not have a style attached, it will not appear in the table of contents.

Step Two: Ensure your cursor is placed where you want the contents page to be. Select the 'References' ribbon and then 'Table of Contents'. Select either 'Table 1' or 'Table 2'. The table will now appear.

Step Three: To format the appearance (font, line spacing, size) of the table, right-click on the table and make the necessary changes.

Step Four: If you add additional pages or make amendments to the document, click on the table of contents and select the 'Update Table' option.

Figure 10.17

Bookmarks

A 'Bookmark' in Microsoft Word marks a specific section or part of the document so that it can be easily **identified** or located. These can then be searched for to avoid having to navigate through the entire document.

Step One: Select the text or image you want to bookmark. Select the 'Insert' ribbon and select 'Bookmark'.

Step Two: Give the bookmark an appropriate and meaningful name – spaces cannot be entered so use the underscore (_). Once complete, click 'Add'.

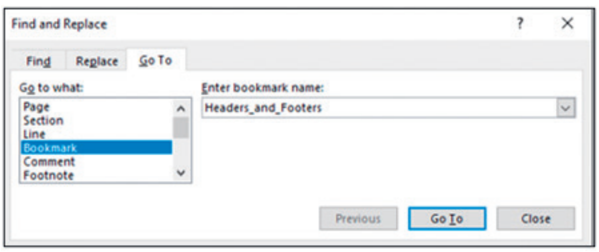


Figure 10.18

Step Three: To locate a bookmark, push 'F5' on your keyboard. The dialogue box will appear.

Step Four: Select 'Go To' and then select 'Bookmark' from the 'Go to what' list. Locate the bookmark required and select 'Go to' and Word will bring you to the correct location/page.

Cross-references

A cross-reference allows a **link to be established** to elsewhere in the document. For example, if a report is referencing a table or graphic used elsewhere in the document, it may refer to the title of this reference. This will appear as a link that the user can click which will bring them to the item referenced.

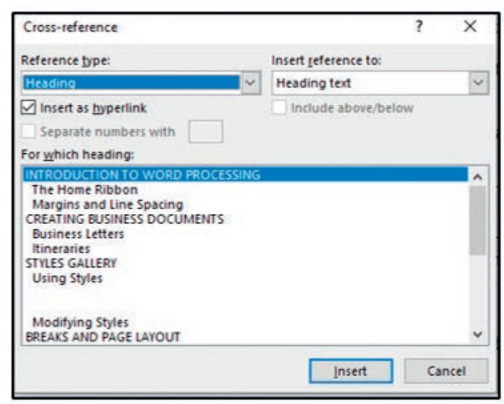


Figure 10.19

Step One: Create the cross-reference (to the table, heading, image) by selecting it, then selecting the 'References' ribbon and 'Cross-reference'. Complete the dialogue box accordingly based on the type of reference.

Step Two: In the main body of the document, select the term you want to link to the cross-reference. Select the 'References' ribbon and then 'Cross-reference' like the previous step.

Step Three: Search for the cross-reference for the object that you created in Step One. Ensure the 'Insert a hyperlink' box is ticked and then click 'Insert'.

Step Four: The text in the document will now be a hyperlink. Click the link and it will take you to the cross-referenced object.

Footnotes

Footnotes are **supplementary information** recorded at the bottom of the page which refers to a piece of text contained on the page. Within the document these are identified by a numerical reference mark superscripted, next to the word it relates to. These could, for example, provide a definition for a word or provide context to data.

Figure 10.20

Step One: Place your cursor at the end of the word you want to add the footnote to. Select the 'References' ribbon and select 'Insert Footnote'.

Step Two: This will automatically bring you to the bottom of the current page. Key in or copy the text to be included in the footnote. A superscripted number will now appear next to the related term in the body of the document.

Endnotes

Similarly to footnotes, endnotes can provide additional context or information which is not to be included in the main body of the document. The difference is that endnotes appear on the **last page** of the document, instead of the bottom of the page they relate to.

Figure 10.21

Step One: Place your cursor at the end of the word you want to add the endnote to. Select the 'References' ribbon and select 'Insert Endnote'.

Step Two: This will automatically bring you to the last page in the document. Key in or copy the text to be included in the endnote. A superscripted roman numeral will now appear next to the related term in the body of the document.

To remove/delete a footnote or endnote, simply delete the superscripted number within the body of the document.

Watermarks

A watermark is a faded background that is displayed **behind** the text in a document. Watermarks can be either text or graphics. Often, they are used to display the logo of the organisation or can be used to show the status of a document: for example, if it is a 'Draft' or if it contains information classed as 'Confidential'.

Inserting a text watermark

Step One: Select the 'Design' ribbon and select the drop-down option 'Watermark'.

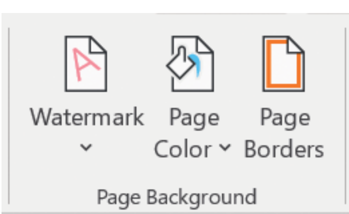


Figure 10.22

Step Two: Select the 'Custom Watermark' option and the dialogue box will appear.

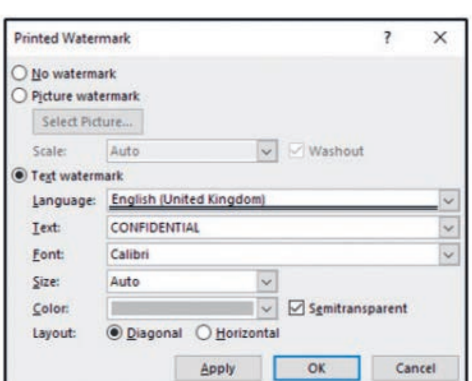


Figure 10.23

Step Three: Select the tick box 'Text watermark'. You can then key in the required text to be shown. Unless the question states otherwise, leave the remaining section as it is. Click 'OK'.

Step Four: The text watermark will now appear across all pages of your document (Figure 10.24).

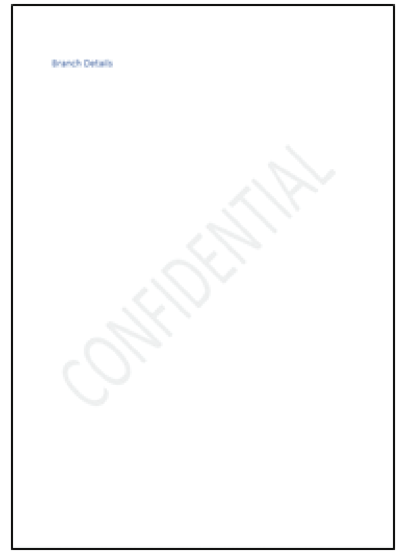


Figure 10.24

Inserting a picture watermark

Step One: Select the 'Design' ribbon and select the drop-down option 'Watermark'.

Step Two: Select the 'Custom Watermark' option and the dialogue box opposite will appear.

Step Three: Select the tick box 'Picture watermark'. Click 'Select Picture' and find the image you want to include. Unless the question states otherwise, leave the remaining section as it is. Click 'OK'.

Step Four: The picture watermark will now appear across all pages of your document (Figure 10.25).

Figure 10.25

To delete a watermark from your document, simply go to the 'Design' ribbon, select the drop-down at 'Watermark' and click 'Remove Watermark'.

Figure 10.26

Review functions

The review functions of Microsoft Word allow users to check the entirety of the document for errors or improvements. This also allows users to make general improvements to the document while checking it through.

Comments

Similar to a spreadsheet, comments can be added to a document to provide further instruction or to provide context to the information. In the Assignment, the Word documents you are to complete will have comments that contain your instructions for the task.

To add a comment to the documents, simply right-click where you want the comment to relate to and select 'New Comment'. A red line will then link to a box at the right-hand side where text can be keyed in.

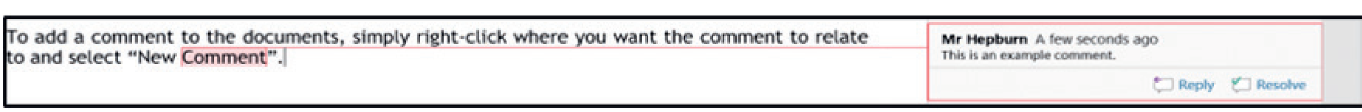


Figure 10.27

Before starting a word processing question, select the 'Review' ribbon and select 'Show Comments'. This will show you where all of the comments are in the document to ensure you do not miss one.

Once you have completed the question and proofread your work, return to the 'Review' ribbon and select 'Delete all comments in the document' before printing.

Digital resources, consisting of practice tasks and a practice assignment, are available at **www.hoddergibson.co.uk/higher-admin-tasks**

Word count

Documents may have a maximum or minimum word count. To check this, select the 'Review' ribbon and select 'Word Count'. The dialogue box will contain key information about the document.

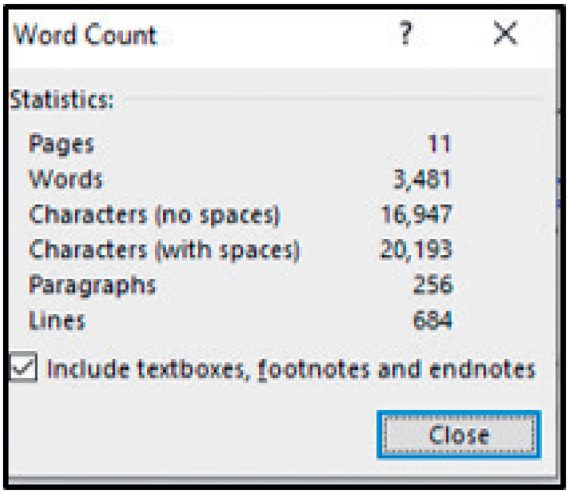


Figure 10.28

Thesaurus

Word has a built-in thesaurus to help improve the quality and style of your work. You can access this facility on the 'Review' ribbon. Highlight the word you would like to change and the thesaurus will return a list of possible replacements.

Find and replace

Vocabulary, phrases or individuals listed within a document may need to be changed from time to time, such as replacing the word 'stock' with 'inventory' in accounting. To locate and change all of those terms within a large document would be an ineffective use of time. However, Microsoft Word has a 'find and replace' function which does this for you.

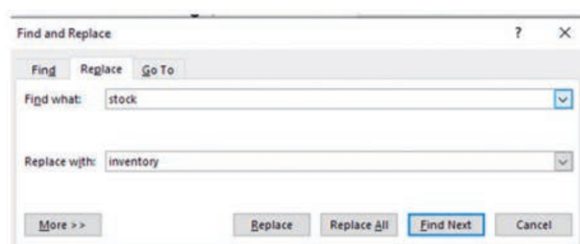


Figure 10.29

Step One: Push 'F5' on your keyboard. The dialogue box on the right appears.

Step Two: Select 'Replace'. On the first line, key in the phrase to search for and underneath key in what it should be replaced with.

Step Three: 'Replace All' will replace all of the original terms with the new word or phrase.

Tables

Tables are an effective way of displaying data within a document. They can also be used to create a variety of business documents such as forms or itineraries due to their composition of cells located within rows and columns. They can also be used in replacement of tabs for producing lists.

Inserting tables

Step One: Select the 'Insert' ribbon and then the drop-down at 'Table'.

Step Two: You can either use the grid to insert the table by highlighting the correct number of cells to be included or use the 'Insert Table' function by manually keying in the number of columns and rows required (Figure 10.30).

Step Three: Once your table is inserted, the 'Table' ribbon will appear, which allows you to format the 'Design' and 'Layout' of the table.

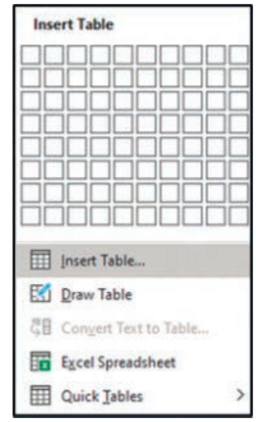


Figure 10.30

Figure 10.31

The Table 'Design' ribbon allows you to apply built-in 'styles' to your table, to shade particular cells or to adjust the type, colour and thickness of borders.

Figure 10.32

The 'Layout' ribbon (Figure 10.32) allows you to insert or delete columns/rows, adjust the height or width of the table and to format the alignment of the text within the table.

Merging cells can be used to create a title or sub-heading for the table by merging multiple cells into one.

Department	Manager	Supervisor
Marketing	J Wood	S Alderdice
Human Resources	L McArthur	C McLeod
Operations	L McMillan	L Valentine
Finance	S Argo	W Petty

Figure 10.33

Department	Manager	Supervisor
Marketing	J Wood	S Alderdice
Human Resources	L McArthur	C McLeod
Operations	L McMillan	L Valentine
Finance	S Argo	W Petty

Figure 10.34

Converting text to table – worked example

There may be a body of text within a document in the Assignment that you are to convert into a table. This makes it easier to analyse, edit and format.

Department	Manager	Supervisor
Marketing	J Wood	S Alderdice
Human Resources	L McArthur	C McLeod
Operations	L McMillan	L Valentine
Finance	S Argo	W Petty

Figure 10.35

Step One: Select the data to be converted into a table.

Step Two: Select the 'Insert' ribbon and the 'Table' drop-down option. Select 'Convert Text to Table'.

Step Three: A dialogue box will appear. Microsoft Word will automatically 'Separate text at'. Check this is set correctly. In this instance, it is 'Tabs'. Once you have checked it, select 'OK'.

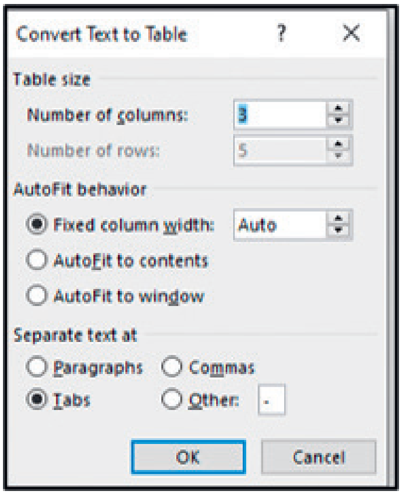


Figure 10.36

Step Four: Your table will be created and you can format it accordingly.

To convert a table to text, click the 'Convert to Text' option on the table 'Layout' ribbon.

Figure 10.37

Table formulae

It is possible to perform mathematical calculations in a table within Microsoft Word. As in spreadsheets, they use functions such as:

- Average – calculates the average from the values selected.
- Count – returns the number of cells selected.
- Max – calculates the highest value in the range.
- Min – calculates the lowest value in the range.
- Sum – calculates the total value of the range.

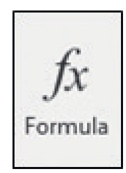


Figure 10.38

The difference here is you need to use 'positional' arguments instructing Word if it is the cells above, below, left or right that you are wanting to calculate. To insert formula, select the 'Table Layout' ribbon and select the 'Formula' icon. A dialogue box then itemises the steps for you.

Sorting tables

Tables can be sorted in Microsoft Word to make the data more meaningful or to put it in an accessible order. You can be asked to sort on up to two fields in Word.

Step One: Select the table you want to sort.

Step Two: Select the 'Data Layout' ribbon.

Step Three: Select 'Sort' and a dialogue box will appear.

Step Four: Select the first column to sort on.

Step Five: Add any further columns that are to be sorted.

Step Six: Select 'OK' and your table will be sorted.

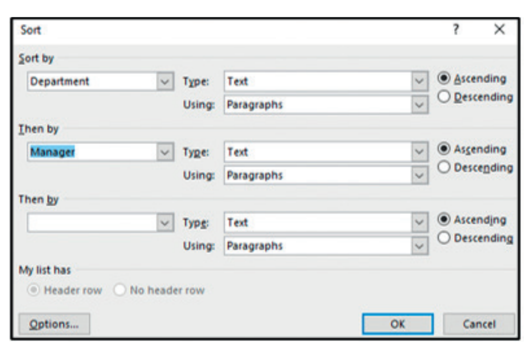


Figure 10.39

Forms

Forms can be completed digitally in Microsoft Word using tables, which will still achieve the allocated marks in the Assignment. Using the layout features of Word such as merging cells and splitting cells can make a form more practical, while borders and shading can make it look more professional.

However, with the 'Developer' ribbon enabled, forms can also be created for electronic completion with built-in fields.

The important point to remember about forms is they need to be fit for purpose and user friendly. They should be relatively straightforward to complete and should capture all of the data required.

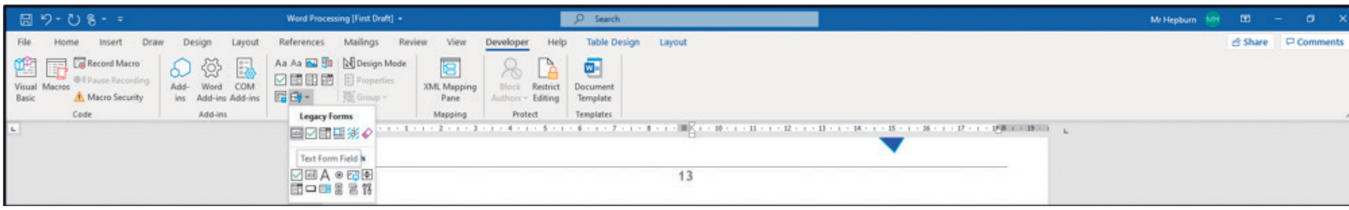


Figure 10.40

The types of fields that can be used in the 'Developer' ribbon are summarised in the table below.

Field type	Description
Text form field	Users can type their response directly into the box provided. It can be used for extended response or open questions.
Check box form field	Users can tick a box that is applicable to them. It can be used to indicate a preference or choice between alternatives.
Drop-down form field	Users can select from a list of potential options listed in a drop-down. It can be used to select from specific categories or groups.
Option button	Users select the box that relates to them for a dot to appear. It can be used when recording on a scale.

Table 10.5 Field types

In order to prevent users accidently amending or altering the form, it can be protected to restrict editing. This means individuals can only get access to the form to complete it.

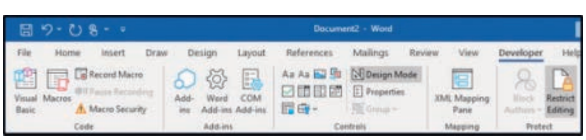


Figure 10.41

Select the 'Developer' ribbon and select 'Restrict Editing'.

A pane will appear at the right-hand side where settings can be applied to restrict access. The example in Figure 10.42 only allows users to edit the document in terms of filling in the fields of the form.

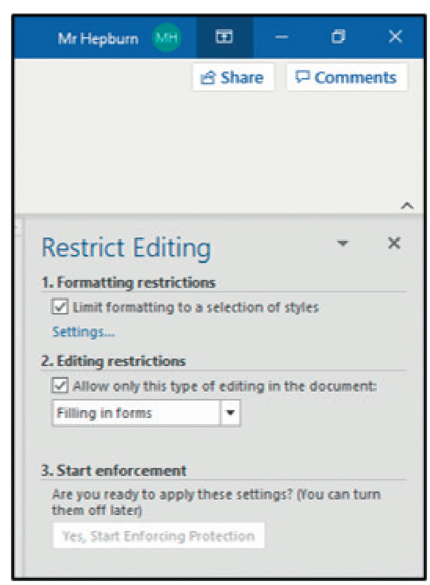


Figure 10.42

Digital resources, consisting of practice tasks and a practice assignment, are available at **www.hoddergibson.co.uk/higher-admin-tasks**

Mail merge

Organisations often produce multiple copies of the same document which are sent out to different individuals with some degree of specialisation, such as letters. Mail merge allows users to create **one standardised document** for mass issue while incorporating personal details from a spreadsheet or database.

Mail merge – worked example

Mander's Publications want to send the same generic letter to all of their clients in London. They have already queried the database to identify eligible customers.

Step One: Open or complete the word-processed file you are to use for the mail merge. If using a partially completed file, there may be gaps or asterisks (*) to indicate where merged fields are to go (Figure 10.43).

Step Two: Select the 'Mailings' ribbon and then the drop-down at 'Select Recipients'. Select 'Use an existing list' (Figure 10.44).

Step Three: Search for the file required. Once located select 'Open'.

Step Four: Word has now imported the required fields for the mail merge. Start to assemble your document following the 'house style' of the layout. To insert a merged field, select 'Insert Merge Field' and select the correct field from the drop-down. Remember to leave a space between merged fields.

Step Five: Repeat this step until all of the sections have the merged field inserted. It will look like this: <<Merge Field Name>>.

Step Six: Select 'Preview Results' to see the completed mail merge. You will be asked to print a document for a selected record. Use the 'Find Recipient' option and key in the recipient's name to locate their document. Print the document for this individual following standard printing procedures.

Step Seven: Select 'Preview Results' again to return to the mail merged fields. Print one copy of this document too. You may also be asked to complete a mail merge from a spreadsheet document. The steps are identical, the only difference is that you are to retrieve an Excel document as opposed to Access.

The majority of mail merge questions are from databases. You must ensure you read the question carefully and extract the correct fields or conduct a query first to avoid producing documents for the wrong individuals.

EXAM TIP

A query is often required for the mail merge. Read the question carefully to ensure you are including the correct individuals or items on the mailing list.

Figure 10.43

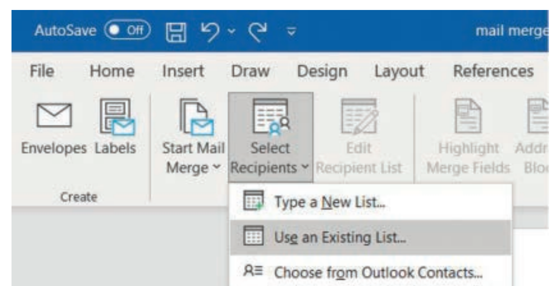


Figure 10.44

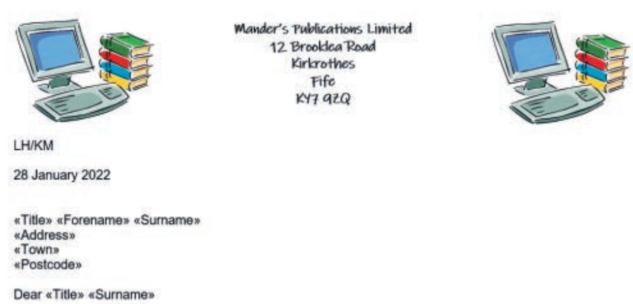


Figure 10.45

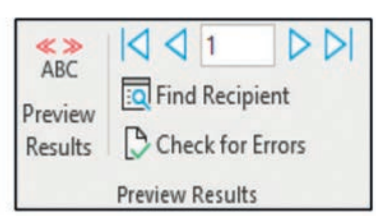
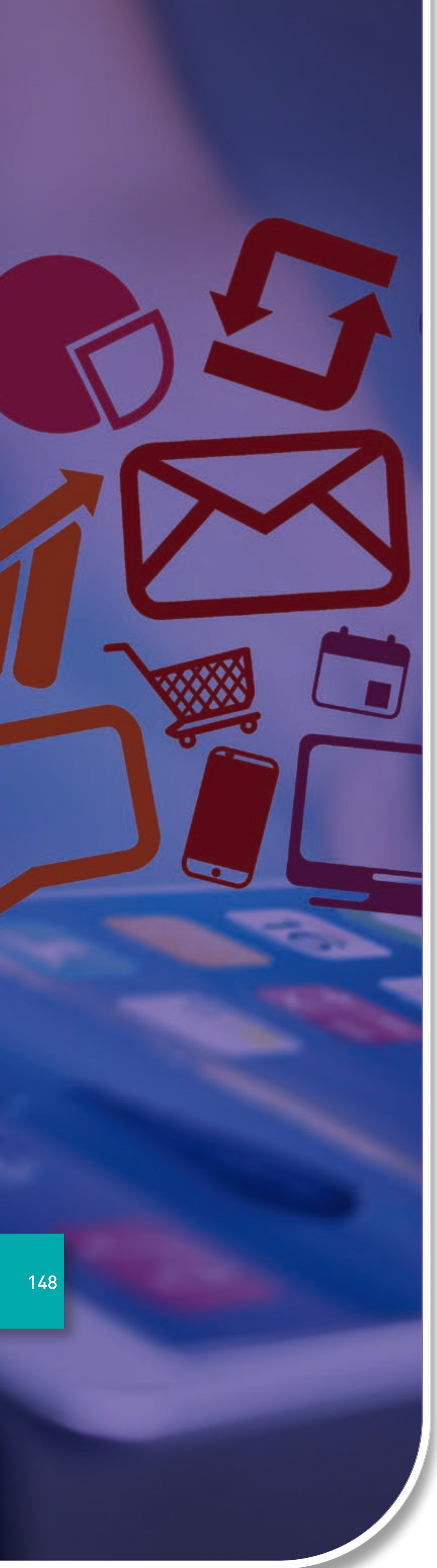


Figure 10.46

EXAM TIP

You should always have two printouts for a mail merge question: one of the full merged document, showing the details, and one showing the merged fields.



Chapter 11 Presentations

Editing and formatting presentations

Figure 11.1 Microsoft PowerPoint logo

Presentations can be used to present a **wide variety of media** to an audience, communicating various types of information. They have built-in features which allow them to be designed to be more engaging and stimulating for the audience, while making the process of presenting easier and more manageable for the individual delivering the presentation. Microsoft PowerPoint is software used to create presentations.

Inserting slides and text

TOP TIP

When inserting new slides, ensure the formatting of headings is consistent throughout the entire presentation. Watch out for capitalisation and formatting features applied.

EXAM TIP

In the Assignment you will be given a partially completed presentation for you to edit and add to. To add new slides, on the 'Home' ribbon, select 'New Slide'. There is a drop-down option where you can select the layout of the new slide. Read the question carefully and pick a layout that will accommodate the requirements.

The pane at the left-hand side of the presentation is referred to as the '**Slides Tab**' and shows you thumbnails of your slides in the order of the presentation. To change the order of the presentation, simply click and drag the slide to the desired location in the presentation.

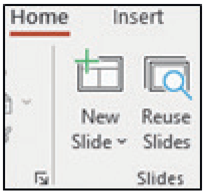


Figure 11.2

Adding data and dynamic linkage

You may be asked to insert data from another software application into your presentation. This could include a chart from Excel or a table from Access. However, if you make changes to the content of the chart in Excel, you want these changes to update automatically to the copied chart within the presentation. This is referred to as '**dynamic linkage**', where changes in one software application will automatically update the content in another.

Step One: Copy the content to be included (in this example, a chart) from the source file.

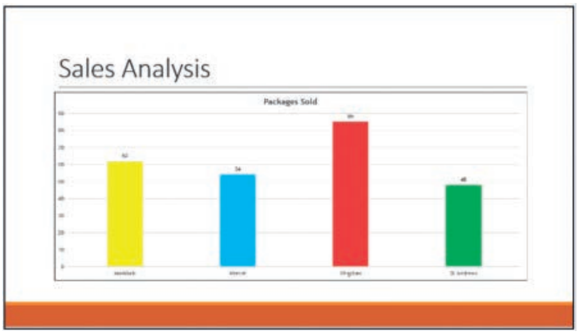


Figure 11.3

Step Two: In the desired location on your slides, hold down 'CTRL' and 'V' at the same time. This will then paste the chart with the formatting applied while dynamically linking it. If you change data in the spreadsheet, the chart will automatically update.

You can also right-click and select either the third icon along (which will update the format to match the theme of the slides) or the fourth icon along (which will keep the original format) while both dynamically linking to the source file.

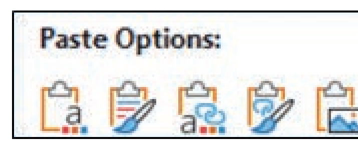


Figure 11.4

Embedding multimedia

Another advantage of presentation software is that multimedia can be embedded into the presentation. This means that **video clips or audio files** can be built in to the slides and set to play during the presentation. This avoids the need to leave the presentation and load the internet to display the media.

These can be added from the 'Insert' ribbon by selecting either 'Video' or 'Audio' or 'Media'. Files can be loaded from the device itself or taken directly from the internet.

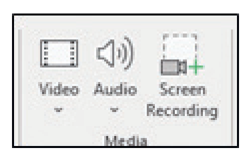


Figure 11.5

Customising animations and transitions

To maintain the engagement of the audience, the entrance (and exit) of slides or slide contents can be animated to move in a particular way.

Animations

Animations are used to enhance the entrance/exit of content on slides such as text, graphics and charts.

There are three types of animation available:

- entrance animation
- emphasis animation
- exit animation.

Transitions

A slide transition is an effect that is used to enhance the entrance/exit of slides from one to the next.

Slide transitions can give a presentation a more controlled feel and can improve the engagement of the audience.

Transitions can be added on the 'Transitions' ribbon. Simply select the transition that is desired to be applied to the slide. It is good practice to use the same transition throughout the presentation as this looks more professional. Select 'Apply to All' for this to happen.

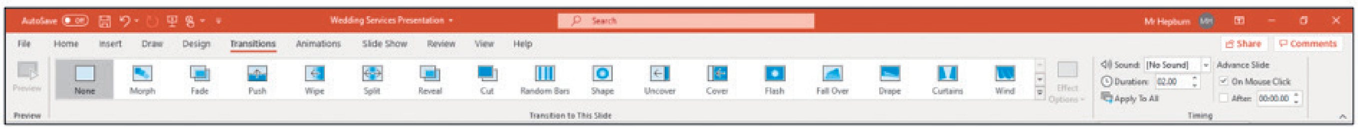


Figure 11.6

The slide time can be customised using the 'Advance Slide' option. It can be set to move once the mouse has been clicked or set to advance after a set period of time.

Animations can be added on the 'Animations' ribbon. Select the object (for example, textbox or image) by clicking it or placing the cursor before it. Then select the animation to apply. For a textbox, if you place the cursor before the first line of text, PowerPoint will automatically add the same animation to the remaining text.

Figure 11.7

Similarly to transitions, the timing of the animations can be adapted to suit the needs of the presenter. At the 'Timing' options, the transition can be set to appear on the click of the mouse or after a set period of time.

Insertion of hyperlinks

In the course of the presentation, the presenter may need to refer to a **website** or a document saved elsewhere. To avoid the time wasted to retrieve this information separately, a hyperlink can be included within the document. Once this is clicked on the presentation, it will automatically open the destination webpage or document.

Step One: Select the object you want to hyperlink by right-clicking it.

Step Two: Select 'Link'.

Step Three: Either locate the document you want to link to, or key in/paste the URL of the website.

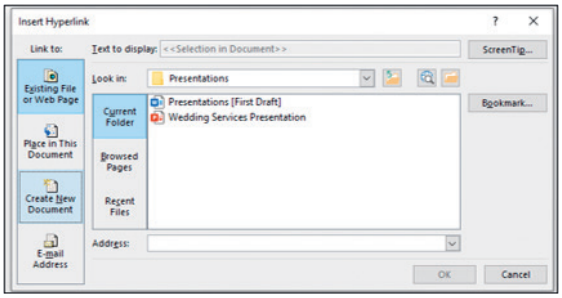


Figure 11.8

Step Four: Select 'OK'. Now, when it is clicked, it will take the presenter to the linked document.

Creating and editing notes

In order for the presentation to be as effective as possible, the presenter will need to carefully plan what needs to be said to ensure that all of the information is passed on to the audience in the most engaging way possible. To avoid forgetting key details or to ensure the presentation flows appropriately, '**presenter notes**' can be added to the slides, which will help guide the presenter.

EXAM TIP

You may be asked to add and print notes to a PowerPoint. The SQA are assessing your keyboarding skills here, so accuracy is key. Proofread your work before printing.

These can then either be viewed on the 'Presenter View' of the screen or printed at the bottom of the slides as separate notes.

Notes are added at the bottom pane of the screen underneath the slides. If this pane is missing, select the 'Notes' option at the bottom right-hand corner.

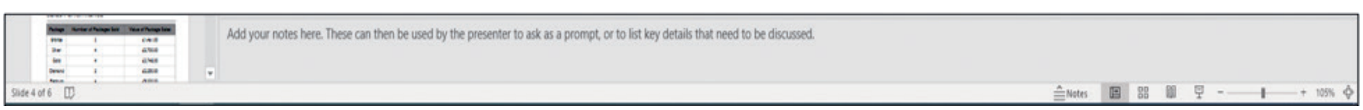


Figure 11.9

Advancing slides automatically

The presentation can be set up to move through the slides automatically without any clicks to advance it. This is particularly beneficial if the presenter is on a stage presenting to a large audience, away from the computer.

However, careful planning is required to ensure the slides advance at the correct time. The presenter should practise the presentation to see how long it takes to discuss each part.

The presentation can be rehearsed using the 'presenter notes' to see how long each slide takes. Select the 'Slide Show' ribbon and select '**Rehearse Timings**'. The slideshow will then run as directed. Practise the speech, advancing the slides once you are ready to move on. Once the presentation comes to an end, it will ask if you want to save the new slide timings. Select 'Yes' and your presentation is now set up to advance automatically.

Figure 11.10

Looped presentations

A presentation can also be looped so that it will **play continuously** until instructed to stop. This is beneficial if the presentation is being shown on a screen in a communal area such as reception.

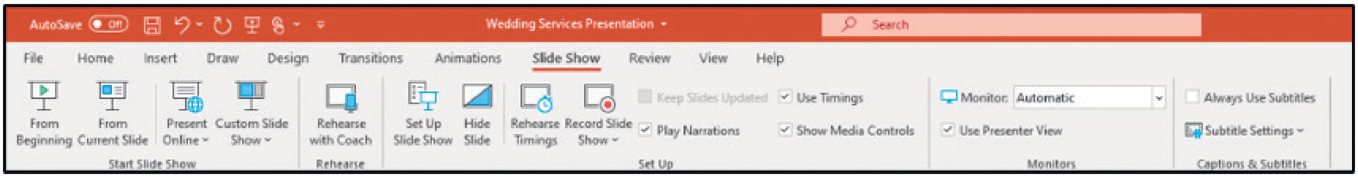


Figure 11.11

Step One: On the 'Slide Show' ribbon, select 'Set Up Show'.

Step Two: A dialogue box will appear. Under 'Show options', select the first tick box to 'Loop continuously until Esc'.

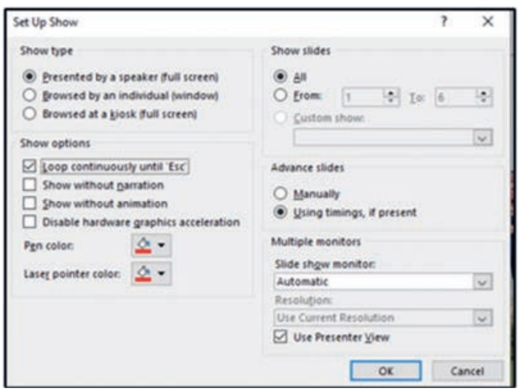


Figure 11.12

Step Three: Select 'OK'.

Now when the presentation is put into slideshow mode, it will repeat itself until the 'Esc' key is pushed.

Printing slides

The instructions for printing slides can be very specific in the Assignment. Check the question carefully to see what it is looking for. Before printing proofread your work to ensure:

- all aspects of the question have been answered
- the slides are in the order specified
- graphics or text are not clipping the template
- there are no spelling or grammar errors
- a consistent font has been used throughout.

Once you are ready to print, select 'File' and then 'Print'.

- **Full page slides**: Will print each slide on an A4 page of its own as shown in the presentation.
- **Notes pages**: Will print each slide on an A4 page of its own with the presenter notes underneath.
- **Outline**: Will print 'skeleton slides' showing only the text that has been entered.
- **Handout**: Will print the slides as thumbnails. Three slides per page gives space to write at the side.

Figure 11.13

To change the format of the printout, select the drop-down at 'Full Page Slides'. A variety of slide and handout options are available.

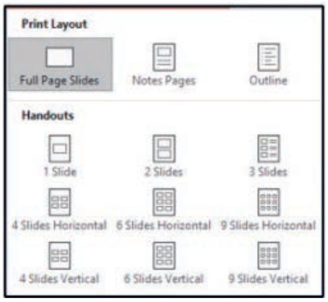


Figure 11.14

EXAM TIP

The examiners may ask for certain slides to be printed in a different format. Read the question carefully. To print only certain slides, key in the slide number at the 'Slides' section.

Select 'Edit Header and Footer' at the bottom of the print options. Depending on the format of your intended printouts, select either the 'Slide' or 'Notes and Handouts' tab. Here you can add:

- a header/footer for your name/SCN Number
- slide numbers
- date.

On the 'Slide' tab, you can also set it so it will not appear on the title (first) slide.

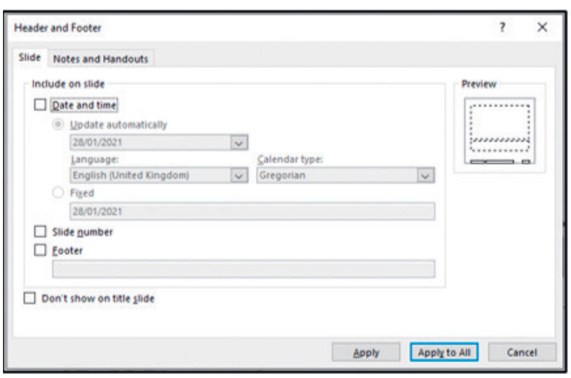


Figure 11.15

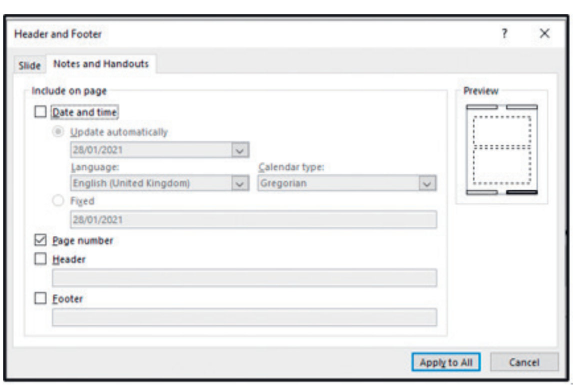
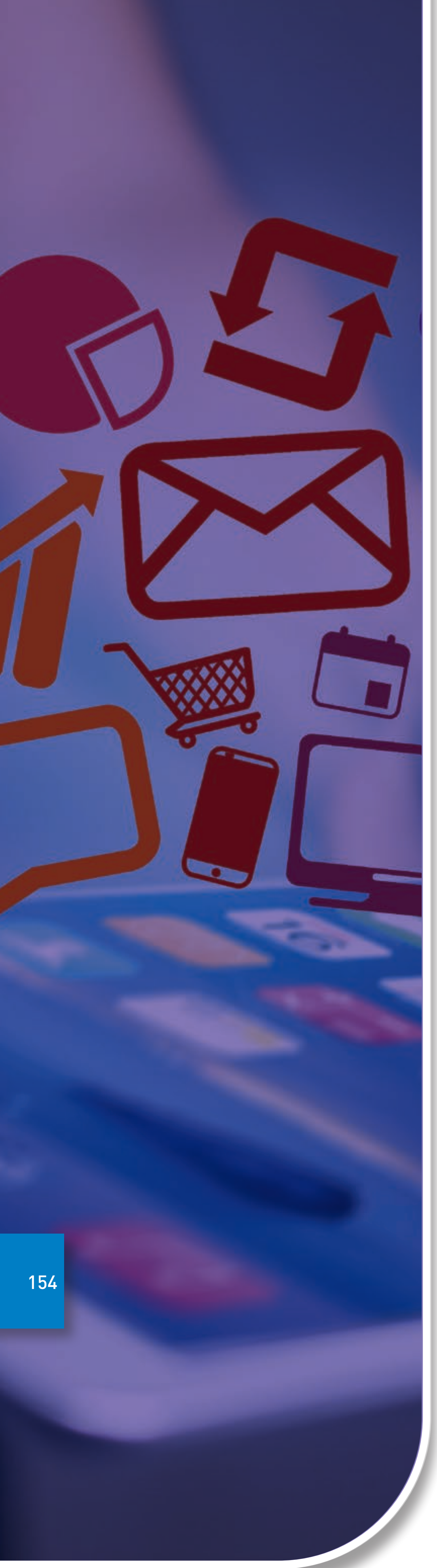


Figure 11.16

EXAM TIP

Check the 'Presentations' section of the National 5 Course Specification document on the SQA website. This outlines more basic functions you should also be aware of, such as design templates and slide masters.



Chapter 12 Email

Sending and receiving emails

Figure 12.1 Microsoft Outlook logo

Emails are messages which are distributed **electronically** from the sender to a recipient. Email is now the most popular form of communication in the business world. Microsoft Outlook is a software package used to compose and send emails which can be accessed via GLOW.

At Higher you are expected to be able to send, receive and print emails correctly. The diagram below shows an exemplar email with the key features labelled.

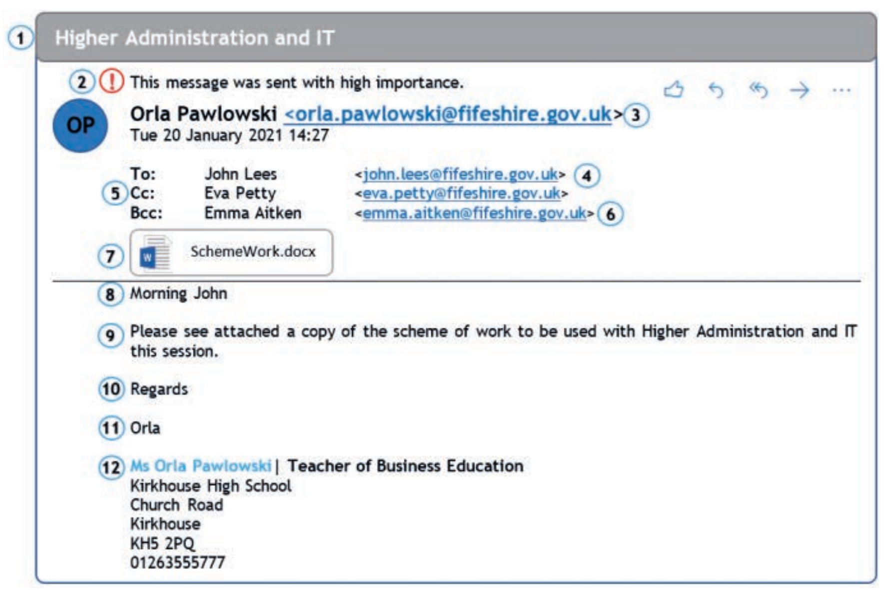


Figure 12.2

TOP TIP

Always proofread your emails before sending them for spelling/grammar errors and to check you have evidenced all requirements of the question.

Number	Feature	Description
1	Subject	A brief summary of the content of the email. Must relate directly to its contents. Spelling and capitalisation accuracy is essential.
2	High importance/urgent	High importance/urgent is used to show the recipient that the content of the email requires immediate attention.
3	Name and address of sender	The name of the account holder who sent the email and their email address.
4	Name and address of recipient	The name of the account holder who received the email and their email address.
5	Cc Carbon copy	Used to 'copy' another individual into the email. This may just be done for reference or recording purposes.
6	Bcc Blind carbon copy	The sender has 'concealed' this user, meaning the recipient and the Cc recipient do not know they have also received it.
7	Attachment	Used to attach documents to the email. This is inserted using the paperclip/'Insert' function.
8	Opening	Used to greet this recipient. This should be informal yet professional. 'Morning' or 'Afternoon', with no comma.
9	Main body	The main content of the email. This should be presented in full sentences, with two line spaces between each section.
10	Close	The 'end' or 'sign-off' of the email. This is how the message comes to a close. 'Regards', with no comma.
11	Name of sender	The sender's first name follows the close and two line spaces. Leave two line spaces after.
12	Signature	The full name, job title and contact details of the sender. This allows the recipient to get in contact with the sender if need be.

Table 12.1 Email features

Signatures

Email signatures should appear at the bottom of each email composed. They contain the name, job title and contact details of the sender of the email. These allow the recipient to contact the sender if they have any more questions. These are **automatically** set to appear at the bottom of each email composed, reducing the need to repeatedly type the information in.

Step One: Select the 'Options' cog at the top right-hand corner. Select the 'View all Outlook settings' at the bottom of the pane.

Step Two: Select 'Compose and reply', and in the 'Email signature' box key in the content of the signature. Ensure both tick boxes are checked underneath and click 'Save'. Your signature will now appear on each email composed.

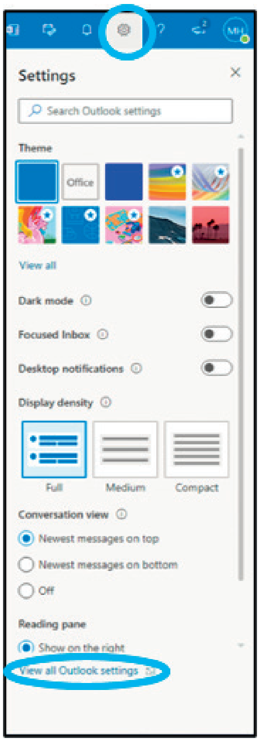


Figure 12.3

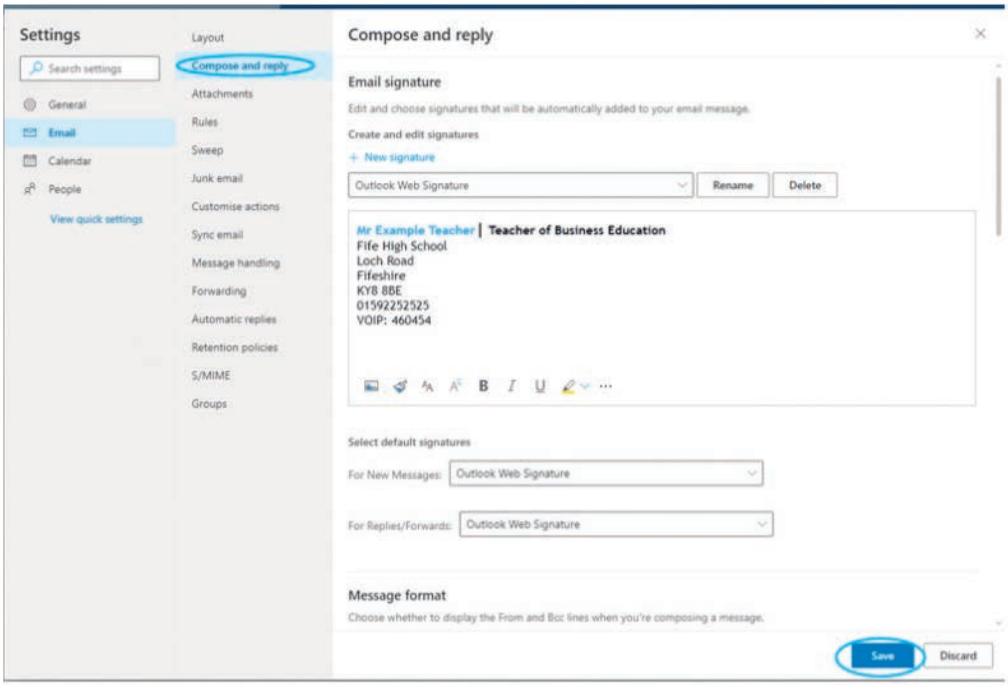


Figure 12.4

EXAM TIP

Your signature is saved after you have created it. Remember to change/update this for each task/assignment you complete – your job title and organisation will change. This information can be found on page 3 of the Assignment paper.

Email etiquette

When composing and sending emails, it is important to follow **standardised rules** and procedures which ensure they come across as professional and appropriate. These rules are referred to as 'email etiquette'. Examples include:

- All emails must have an appropriate subject which reflects the content of the message.
- Do not use capital letters as it appears that you are shouting at the recipient.
- Avoid using high importance/urgent except for priority emails.

Creating and managing folders

Messages should be dealt with once and inboxes should be organised to ensure key information is not lost. One way of doing this is by creating folders for emails to be categorised into. This allows them to be recovered easily and efficiently.

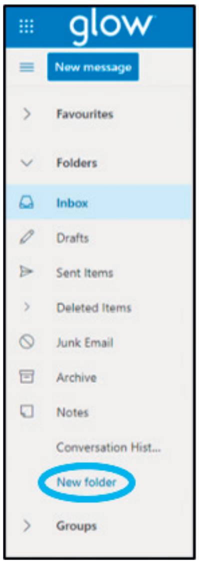


Figure 12.5

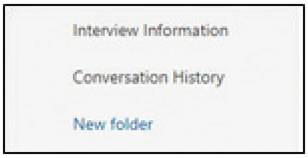


Figure 12.6

Step One: Click the 'New Folder' option at the left-hand side.

Step Two: Give the folder a meaningful name, with accurate spelling and grammar.

Step Three: Drag emails into the appropriate folder to save them in that location.

Creating automated responses

If staff are going to be away from the workplace, for reasons such as annual leave or illness, it is useful to set up an '**Out of Office**' or automated response which will automatically be sent to individuals who have sent an email to their inbox.

This will inform the sender that the individual is currently unavailable, how long they may be away for and possibly who else they could contact in the meantime. This prevents the sender becoming frustrated or agitated that the recipient has not replied.

Step One: Select the 'Options' cog at the top right-hand corner. Select the 'View all Outlook Settings' at the bottom of the pane.

Step Two: Select the 'Automatic replies' option. Slide the icon that says, 'Automatic replies on'. If the length of absence is known, you can tick the 'Send replies only during a time period' option and enter the start date/time and end date/time.

Step Three: Outlook on GLOW gives the option of sending different automated responses depending whether the email comes from inside the organisation (colleagues) or outside the organisation (customers). It is up to the user if they want to differentiate these.

Step Four: Key in the automated response, ensuring it is professional and friendly. Ensure there are no spelling or grammatical errors, and that the response has sufficient information in it to better inform the sender. Click 'Save' and your automated response will turn on.

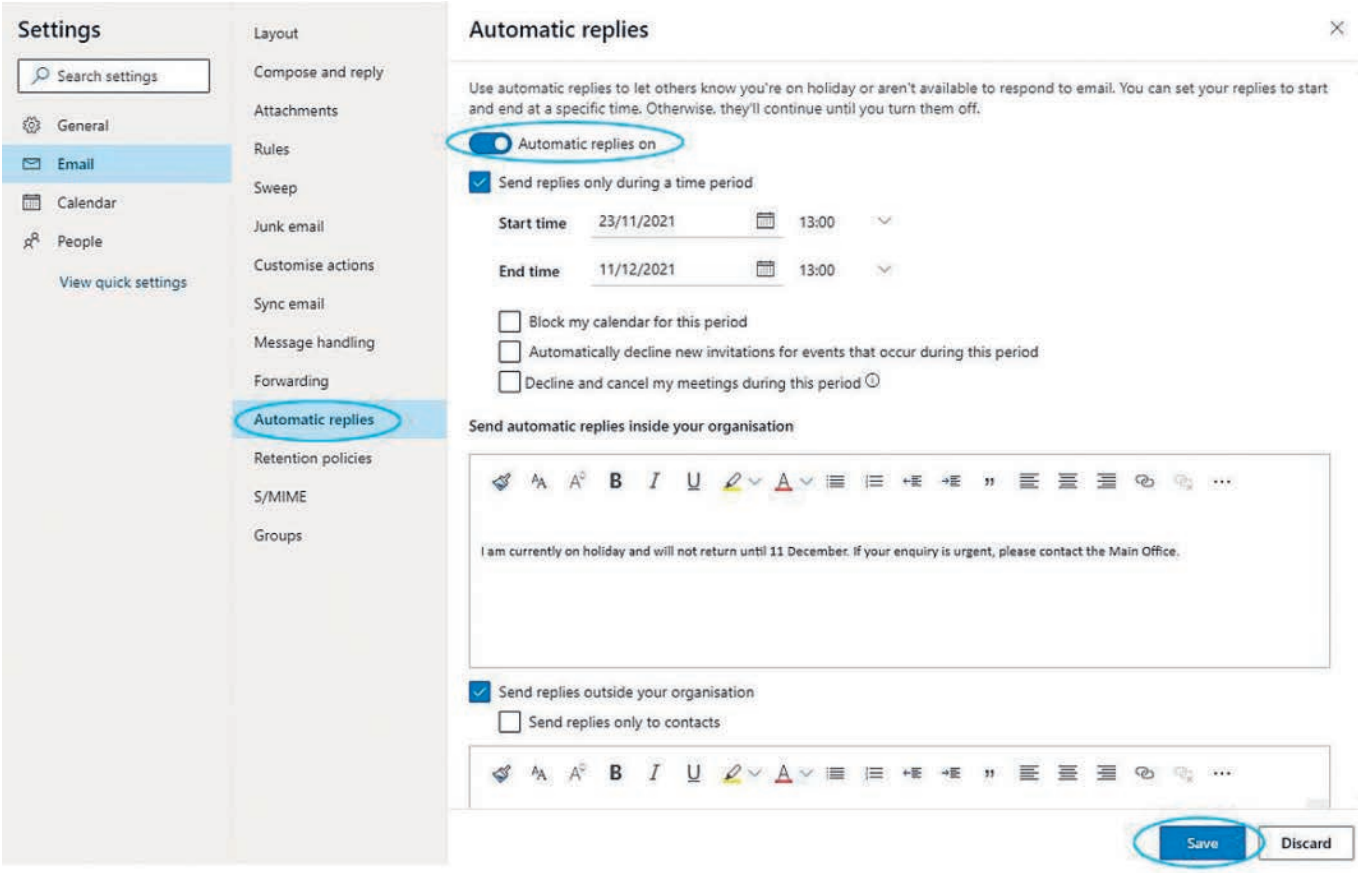


Figure 12.7

Managing messages automatically

Messages can be managed automatically using the 'Rules' section of the 'Settings'. These rules are made up of two components, the 'Condition' and the 'Action'.

Condition		Action
If message body contains keywords.	→	Move to the appropriate/relevant folder.
If message is sent with high priority.	→	Pin to top of inbox.

Table 12.2 Conditions and actions

Digital resources, consisting of practice tasks and a practice assignment, are available at **www.hoddergibson.co.uk/higher-admin-tasks**

Creating and using mailing lists

Often, regular emails need to be sent to the same group of individuals; perhaps they work in the same department or are working on the same project. To avoid repeatedly keying in the name or email address of all recipients, a mailing list can be established. This is **a named contact list** made up of included recipients. The name of the list can be keyed in to the 'To' field on a new email and it will be sent to all members of the list.

Step One: Select the 'People' icon at the bottom left-hand corner.

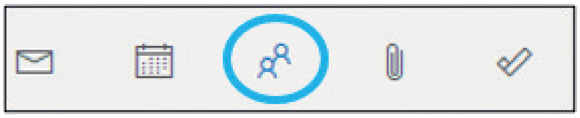


Figure 12.8

Step Two: Click the drop-down option at 'New contact' and select 'New contact list'. A dialogue box similar to the one opposite will appear.

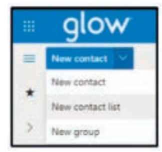


Figure 12.9

Step Three: Give the mailing list a relevant name which is related to its purpose or the group of people involved. You then need to key in the email addresses of those who are to be added to the list, clicking 'Add' each time. You can also add a brief description of the nature/purpose of the mailing list. Once complete, click 'Create' and the list will be saved into your contacts.

Step Four: Compose a new email. In the 'To' field, key in the name of the mailing list required. It will appear as named and you can send the email to all those included, without having to manually enter their email addresses.

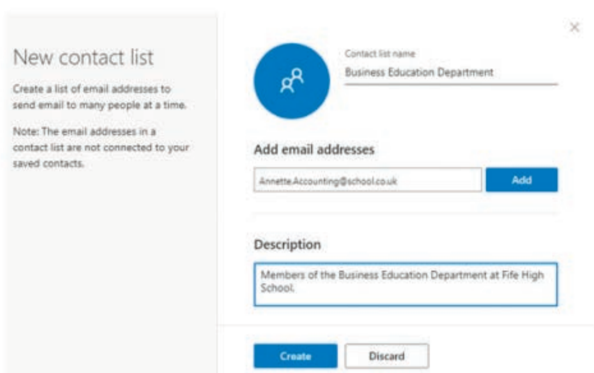
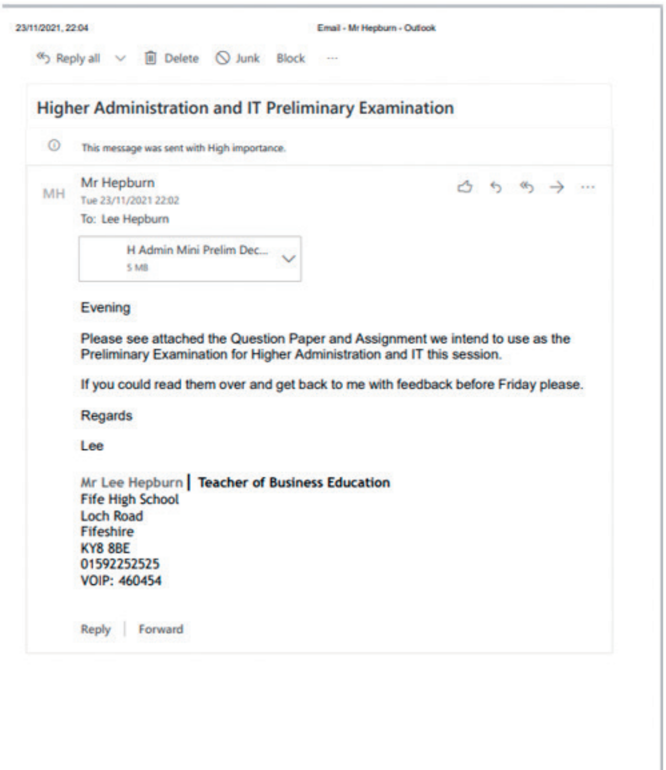


Figure 12.10

Figure 12.11

Printing emails as evidence of sending



23/11/2021, 22:04 Email - Mr Hepburn - Outlook

Reply all | Delete | Junk | Block | ...

Higher Administration and IT Preliminary Examination

This message was sent with High importance.

MH Mr Hepburn
Tue 23/11/2021 22:02
To: Lee Hepburn

H Admin Mini Prelim Dec...
5 MB

Evening

Please see attached the Question Paper and Assignment we intend to use as the Preliminary Examination for Higher Administration and IT this session.

If you could read them over and get back to me with feedback before Friday please.

Regards

Lee

Mr Lee Hepburn | **Teacher of Business Education**
Fife High School
Loch Road
Fifeshire
KY8 8BE
01592252525
VOIP: 460454

Reply | Forward

Figure 12.12

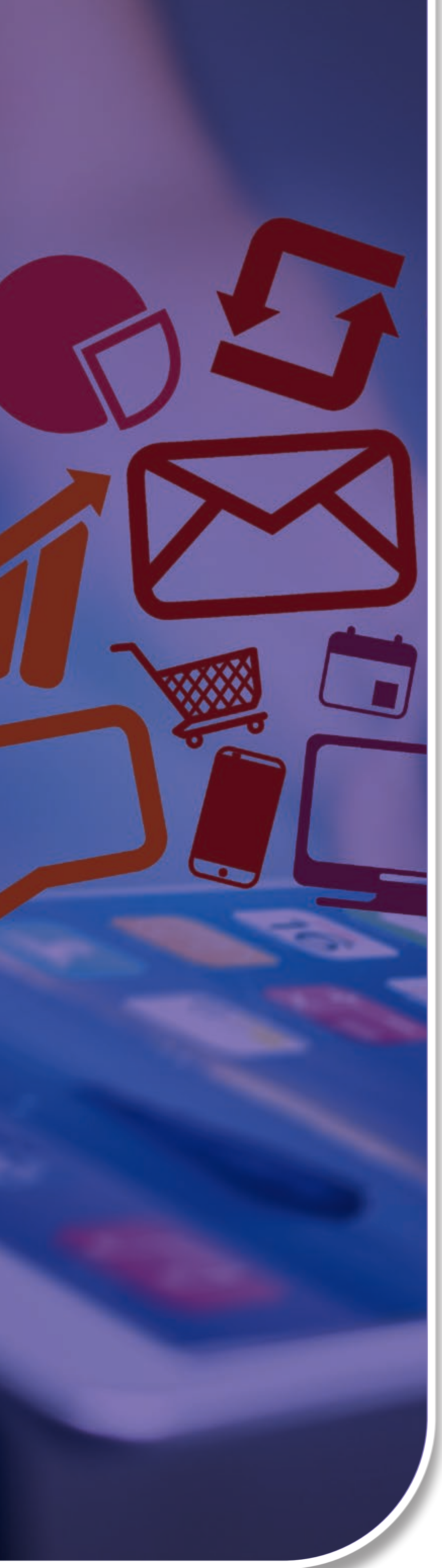
For the Assignment, you need to provide evidence of sending an email. This means you will need to print a copy of the email from your 'Sent Items'. A screenshot of the message keyed in prior to sending does not evidence that you know how to send it.

Once you have keyed in the message proofread it to ensure:

- it is printed with evidence of sending
- the subject is appropriate to the content of the email and has consistent capitalisation
- the correct file has been attached (if appropriate)
- the message has been sent with high importance (if appropriate)
- the email is keyed in accurately with an appropriate opening and close
- an updated signature has been included.

EXAM TIP

Screenshots are not accepted on their own. Your email must be printed from Sent Items. Screenshots can be used to supplement the printout: for example, to show high importance.



Chapter 13 E-diaries

Introduction to e-diaries

Figure 13.1 Microsoft Outlook logo

An electronic diary (e-diary) is an **electronic scheduling tool** used to arrange meetings, events, appointments and other engagements. It is synchronised or **linked** to an email account.

E-diaries have replaced paper-based diaries in recent years. They save the need for manual entering of appointments and the duplication or repetition of recording the same event multiple times. GLOW offers an e-diary through the Microsoft Outlook tile.

The use of an e-diary brings multiple advantages, including the following:

- Events that occur frequently can be added once and set as recurring to avoid the repetition of adding them manually.
- Reminders can be set for specific periods of time ahead of the meeting/event to avoid forgetting.
- Double booking of times and rooms can be flagged up, leading to greater efficiencies.
- Diaries can be shared among staff to show suitable times for meeting and to check where colleagues currently are, making scheduling meetings easier.
- Meetings can be easily scheduled among multiple individuals, reducing the need to set up multiple invitations or reminders.
- There is the provision of a to-do list/tasks which allows users to easily manage their time.
- It acts as a permanent record of what an employee was doing at the time for future reference.

COMMAND WORD TIP

'**Justify** the use of an e-diary.' [2]

The command word 'justify' means to explain why something may benefit or improve.

What this question would be looking for is two advantages of using e-diaries explained to the marker.

To access the e-diary function, the ‘Calendar’ option must be selected at the bottom left-hand corner.

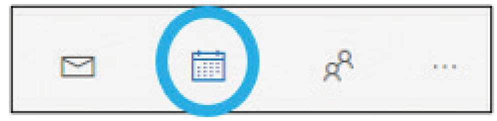
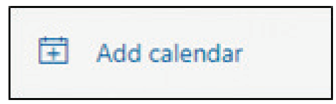


Figure 13.2

EXAM TIP

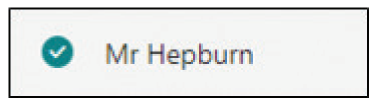
Before entering anything into the e-diary, you should set up a ‘Calendar’ in your name. This means your name will be located at the top of each printout, allowing the invigilator to deliver your printouts to you during the Assignment.

Step One: Select ‘Add calendar’ from the left-hand side.



Step Two: Select ‘Create blank calendar’. Key in your name and select ‘Save’.

Step Three: Ensure your calendar is selected before starting.



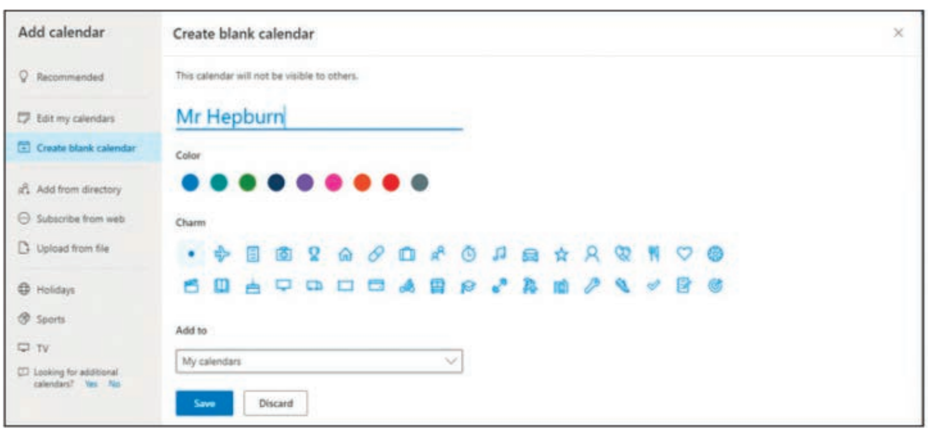


Figure 13.3

Scheduling and editing appointments

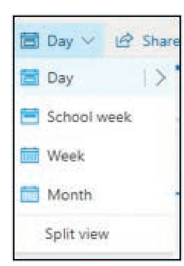


Figure 13.4

The screen shows the calendar for the individual the e-diary belongs to. There are **three views** that you can be asked to edit/print: Daily View, Weekly View or Monthly View. To navigate through these views, select the drop-down option next to the calendar view.

EXAM TIP

The question will always tell you which view to print from.

To schedule an appointment/event you need to complete the following steps.

Step One: Select the date (and correct view) for the appointment. Click ‘New event’ and the dialogue box below will appear.

Step Two: Key in the details of the event from the question. Include as much information as possible and ensure that it has accurate spelling and grammar.

Digital resources, consisting of practice tasks and a practice assignment, are available at **www.hoddergibson.co.uk/higher-admin-tasks**

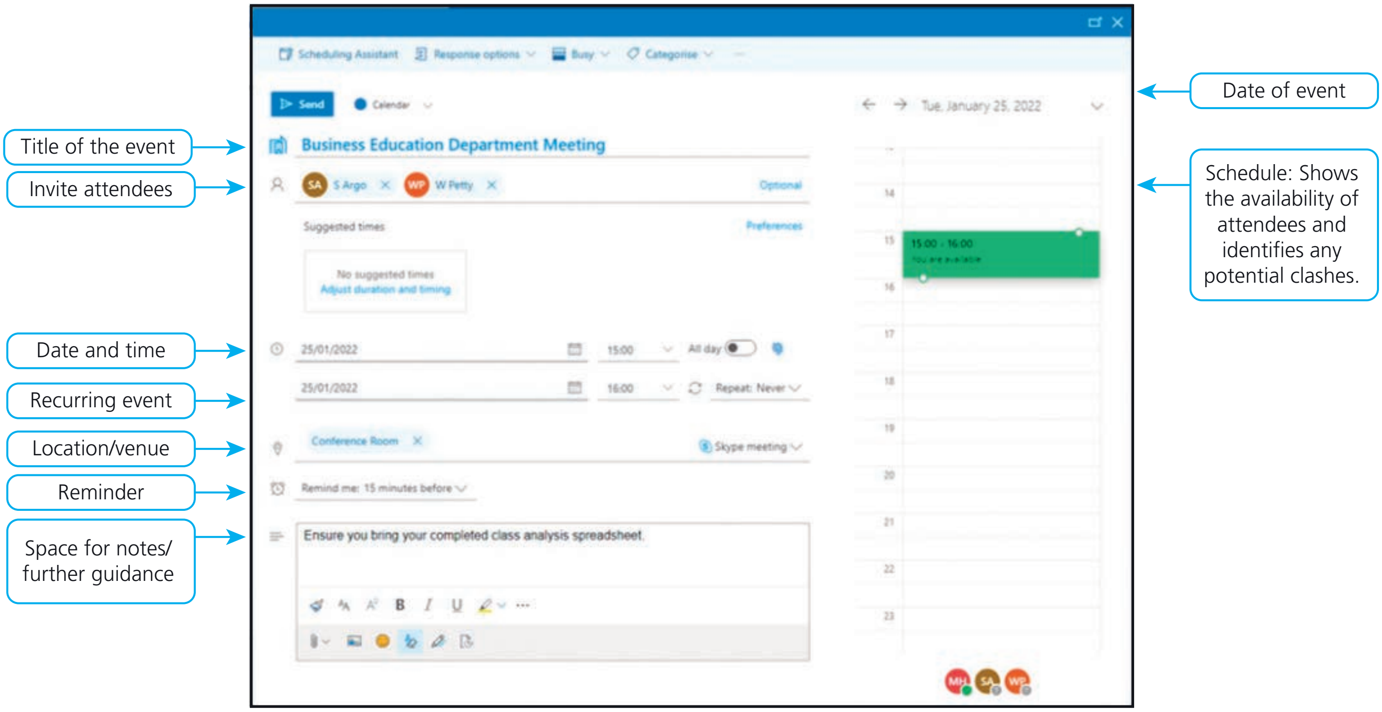


Figure 13.5

Step Three: Select 'Send' or 'Save' (depending whether attendees have been invited). The appointment is now saved into the calendar of the e-diary.

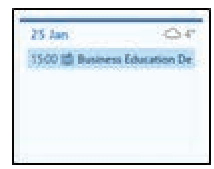


Figure 13.6

TOP TIP

Ensure all relevant information is listed and detailed accurately.

Recurring appointments

Some appointments occur on a regular basis (daily, weekly, monthly). It would be a duplication of effort entering the event each time and so under '**Repeat**', a recurring meeting can be scheduled. This informs the e-diary of the date of the first meeting and the date of the last meeting. It will then **automatically update** the e-diary for the duration of the recurrence.

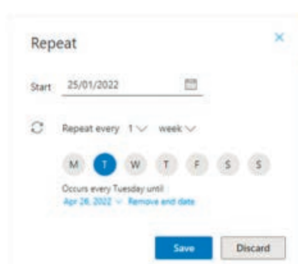


Figure 13.7

Task manager and to-do list

E-diary facilities allow users to generate to-do lists alongside their e-diary. This allows them to manage their time better, as they can budget time to complete these tasks when they are not scheduled to attend a meeting or event. To access this facility, select the tick at the bottom left-hand corner titled '**To Do**'.

Figure 13.8

Tasks can be added by selecting '**Add a task**'. This allows the user to list the steps required to complete the task, attach any required files and schedule a due date. Lists can be grouped together by creating '**New lists**' and naming them appropriately.

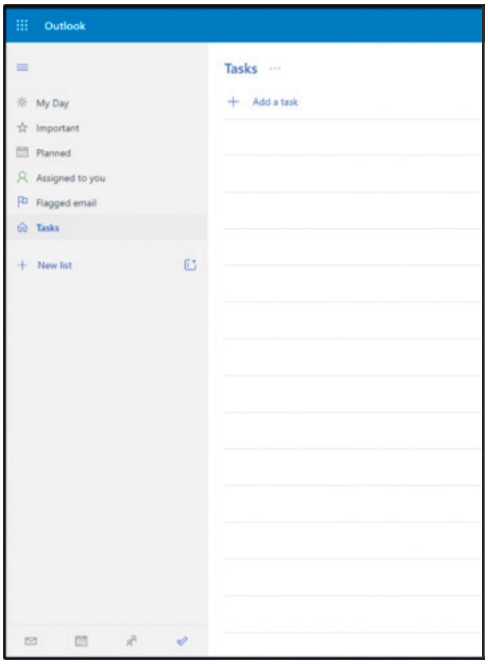


Figure 13.9

Printing e-diaries

It is important to show all of the relevant information when printing e-diaries. Read the question carefully to ensure it is printed in the correct view. Once you have updated the e-diary, follow the steps below.

Step One: Select the 'Print' option at the right-hand corner.

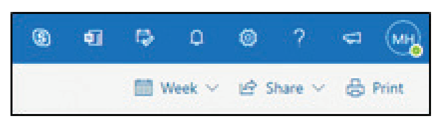


Figure 13.10

Step Two: Ensure the calendar with your name is selected and that the correct view has been chosen. Tick 'Show mini-month' then select 'Print'.

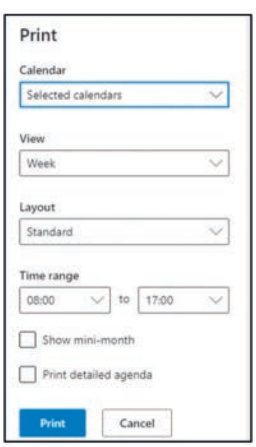


Figure 13.11

Step Three: Repeat the same steps as Step Two and select 'Print detailed agenda'. Once you have selected 'Print', this will show all of the details, which are free from truncation.

Figure 13.12

Digital resources, consisting of practice tasks and a practice assignment, are available at **www.hoddergibson.co.uk/higher-admin-tasks**

EXAM TIP

Always have two printouts for e-diary: the calendar view and the 'detailed agenda'. This will ensure you do not lose marks for truncated data that cannot be read.

Emerging technologies

Electronic communication is now the fastest-growing method of communicating to individuals, be it employees, customers or suppliers. More modern methods of communicating are referred to as 'emerging' as they are still developing and changing in their approach. These can include blogs, podcasts/vodcasts, online groups, webinars and collaborative platforms.

Blogs

Blogs are set up on the internet by individuals who wish to communicate their thoughts and opinions on a particular topic. There are blogs on virtually any topic imaginable.

Blogs can bring together people from around the world who have similar interests to share ideas, make friends and even do business together.

They act as online journals, linked by a common theme.

Podcasts/Vodcasts

Podcasts are audio files which can be downloaded to a computer or mobile device (such as a tablet). This means that individuals can listen to their content at a time and location that is convenient to them.

Vodcasts are video files which can be downloaded to a computer or mobile device (such as a tablet). This means that individuals can watch their content at a time and location that is convenient to them.

Online groups

A discussion group is an online forum for individuals to discuss topics of interest. Posters add their comments, which others can read and then respond to. It is an informal and voluntary way to exchange ideas and information and keeps people up to date on topics of interest. However, caution should be used as anyone can post on these forums, so not all content is reliable and accurate.

Webinars

A webinar is an online presentation delivered by an individual remotely.

Using a variety of presentation tools such as PowerPoint, videos or demonstrations, it allows the presenter to disseminate information to multiple individuals digitally.

This saves on travel costs.

Collaborative platforms

Collaborative platforms require users to log in to a secure area to access resources, tools and software to support their work.

Individuals can work or track their progress remotely across wide geographical areas. They can also communicate with others using instant messaging features or by participating in a 'Group Call'. Microsoft Teams is an example of this.

Figure 13.13 Emerging technologies

Practice exam paper

The theory component of the Higher Administration and IT course is assessed via an exam question paper. This exam makes up 50 of the overall marks and you will be given one and a half hours to complete it. The following practice question paper will test your knowledge and understanding of the theory aspects of the Higher Administration and IT course that were covered in Chapters 1 to 7. Answers can be found on p. 168.

A practice assignment, which tests your understanding of the practical aspects of the course covered in Chapters 8 to 13, can be found at **www.hoddergibson.co.uk/higher-admin-tasks**

Lee has recently started working as an Administration Manager for Tay Designs plc, an interior design company in Dundee, Scotland. Tay Designs has two offices in Dundee and each office is designed to house meetings with clients and employees. Lee is in charge of one office and Steven is in charge of the other office.

Lee is finding the work demanding and is struggling to cope with the various deadlines and meetings that are taking place. The company has invested in training for all staff in the use of electronic diaries to help coordinate key activities for each week. Although these have made it easier to track deadlines and manage events, the unstable company network often means Lee has to depend on a paper-based diary method.

The company is receiving an increasing number of orders which is generating a significant amount of administration. Lee is frustrated by the lack of organisation on the company intranet and often wastes time sourcing files stored in the wrong directories or using files which contain out-of-date information about clients and jobs. The Administration Assistants working for Lee have their own way to file information which makes it difficult for anyone else to source these documents. In addition, employees are downloading files from websites and their personal e-mail on to the network. These files are not always relevant to their work. In the past, this has led to viruses and data corruption.

Lee has organised a meeting with the company owners to discuss possible changes.

SECTION ONE – 10 MARKS

1. (a) Outline the possible strategies Lee could use to improve the electronic file management on the company intranet. **4**

(b) Outline the skills Lee should have as an Administration Manager. **4**

(c) Compare the two diary methods used by the organisation. **2**

SECTION 2 – 40 MARKS

2. Lee might consider using flexible working practices to make his work more manageable. Describe three working practices and justify why he may want to use these. **6**

3. Discuss the advantages and disadvantages of an open plan office layout. **6**

4. Explain how an organisation benefits when its employees work as an effective team. **3**

5. Describe the time and task management strategies Lee could use.

6. Explain the advantages of face-to-face communication. **2**

➜

7. Outline the meanings of the following terms: **3**
VLOOKUP
SUMIF
NAMED RANGE

8. Explain how an organisation would gain advantages from providing good service to its customers. **3**

9. Outline ways an organisation can inform employees of changes in legislation. **4**

10. Describe the stages of team formation. **4**

11. Distinguish the differences between the role of a Chairperson and the role of an Administrative Assistant during a meeting. **5**

Answers to case studies and practice exam paper

Chapter 1: The role of an Administrative Assistant and meetings

	Question and answers	Command word tip and example answer
Q1	One of Niall's roles is to provide administrative support in a meeting. **Outline** the tasks that he would have to do in a meeting. (4)	**Give a brief statement – a short sentence.**
	• Pass any papers to the Chairperson. • Read the minutes of the previous meeting and report any apologies received. • Make sure the Chairperson signs the minutes of the previous meeting. • Make sure everyone signs the attendance register. • Take notes for the minutes of the meeting. • Make a separate note for actions by the Chairperson. • Distribute expense claim forms.	One task of an Administrative Assistant is to pass any papers to the Chairperson for them to check over. = 1 mark
Q2	Niall has to use different ICT for meetings to happen each week. **Describe** the different methods of ICT that could be used in a meeting. (4)	**Give a description and use examples where possible within the description. Try to get 'this means' into your answer.**
	• **Email**: Documents for meetings can be sent electronically so that employees can view them before they attend the meeting. Groups can be set up for regular meetings. • **Videoconferencing**: Reduces the need to travel to attend meetings. Body language/facial expressions can be seen, which helps with communication. It is also possible for presentations of products to be shown, which means better decision making. Meetings can also be recorded and reviewed at a later date. • **Audio conferencing**: A number of people can speak to each other at the same time. Useful if a face-to-face meeting is not needed. • **Videophones**: Allow a number of people to hold a meeting without the need to be in the same place. • **Networks**: User groups can be set up and password protected to allow information to be shared. • **Collaborative whiteboarding**: Allows people at different locations to use the same computer program simultaneously over a network. Text can be highlighted, etc. This is often used with videoconferencing. • **Online application sharing**: Known as groupware – allows participants to access diaries, calendars, etc. It also allows shared documents. People can collaborate on documents without having to meet.	Email is a method of ICT that could be used in a meeting. This means creating groups that could be set up for regular meetings. = 1 mark

	Question and answers	Command word tip and example answer
	• **Electronic diaries**: Allows someone to select a date and time when all participants are free and enter details of the meeting into all participants' diaries. Meeting attendees can accept or decline/immediately. Other diaries can be checked before a date and time is chosen in order to ensure that most people can attend before a notification request is sent. Finally, the notes section can be used to give more detail and reminders/alarms to action tasks or to countdown to a meeting. • **Collaborative platforms (TEAMS)**: Collaborative platforms, such as Microsoft Teams, allow users to share and collaborate on documents while allowing instant communication between individuals either verbally or through videoconferencing. This means that employees can communicate from any location with a connected device.	
Q3	Niall is responsible for training junior Administrative Assistants. **Describe** other roles that Niall is responsible for in his job. (3)	**Give a description and use examples where possible within the description. Try to get 'this means' into your answer.**
	• Maintain and order office supplies. • Manage the e-diary/schedule for management. • Supervise Junior Administrative Assistants. • Prepare reports and presentations for management. • Train Administrative Assistants. • Arrange the work rota for Administrative Assistants. • Delegate work to Administrative Assistants.	Niall will have to maintain the office supplies. This means emailing suppliers and buying products that are needed for the office. = 1 mark
Q4	**Distinguish** between the role of an Administrative Assistant and a Senior Administrative Assistant. (4)	**You must be able to give a difference between two items and use the word 'whereas'.**
	Role of a Junior Administrative Assistant • Prepares key business documents such as letters. • Deals with requests for information. • Conducts reprographic duties such as photocopying. • Operates the telephone system/switchboard. • Conducts reception duties. • Organises business travel and accommodation requests. • Undertakes filing either electronically or digitally. • Creates and updates spreadsheets and databases for use. **Role of a Senior Administrative Assistant** • Operates and controls the petty cash system and pays employee expenses. • Maintains and orders office supplies/equipment. • Manages the electronic diary/schedule of the senior management team. • Supervises the Junior Administrative Assistants. • Prepares presentations and reports for the senior management team. • Delegates and evaluates the work of the Administrative Assistants.	A Junior Administrative Assistant prepares documents such as letters, whereas a Senior Administrative Assistant will prepare presentations and reports for the senior management team = 1 mark.
Q5	**Justify** the need for an agenda before a meeting. (3)	**You must be able to give reasons why a certain course of action is being taken (an advantage).**
	• It is a legal requirement if the organisation is a plc. • It gives attendees the information they require to decide if they need to attend. • It gives attendees time to prepare their thoughts, research information and prepare the resources required. • It will alert attendees to the possibility of a vote.	A reason for having an agenda before the meeting is that it is a legal requirement if the organisation is a plc. = 1 mark

	Question and answers	Command word tip and example answer
	• It will enable attendees to gauge how long the meeting will take. • It gives attendees the opportunity to alert the Chairperson to any additional items to be added.	
Q6	One of Niall's jobs is to arrange a meeting. **Explain** the consequences of inadequate meetings. (4)	**Give a definition and then give an impact.** **If the question is asking for an advantage, give a definition and say 'this is good because' and then give an impact.** **If the question asks for a disadvantage, give a definition and say 'this is bad because' and then give an impact.**
	• The meeting may be postponed. • A badly designed agenda may lead to confusion and time being wasted. • If attendees have not received the agenda in time, they may not be fully prepared for the meeting • An attendee may feel embarrassed if dietary requirements have not been met, e.g. vegetarian and vegan options. • If reception is not informed of the meeting, then attendees may be misdirected. • If parking has not been arranged, e.g. disabled access, this could lead to lateness and stress and the meeting not starting on time.	One consequence is the meeting will be postponed. This is bad because it will mean that the Chairperson will get a bad reputation. = 1 mark
Q7	**Discuss** the advantages of a Senior Administrative Assistant using an electronic diary. (4)	**Give advantages and disadvantages where possible. Use examples if you can in your answer and make a conclusion if possible.**
	• Electronic diaries can be used to check availability of people who will be attending the meeting. This can save time and effort phoning around. • Able to send automatic invites and get instant decline/accept. • It can be used to set deadlines for recurring meetings – this is more efficient, saving the Administrative Assistant time. • It can be used to set reminders of the date of the meeting. This should lead to no one missing a meeting. An alarm can sound to remind you that a meeting is pending. • Set a reminder of the date that documentation relating to the meeting has to be sent out. • Double booking blocks – the system will alert the user to any appointments that when entered would prevent a double booking.	An electronic diary is a good tool for a Senior Administrative Assistant to use because they can check the availability of the people they wish to invite to the meeting. = 1 mark
Q8	**Explain** the advantages of remote meetings. (3)	**Give a definition and then give an impact.** **If the question is asking for an advantage, give a definition and say 'this is good because' and then give an impact.** **If the question asks for a disadvantage, give a definition and say 'this is bad because' and then give an impact.**
	• Staff do not have to travel to meetings. • Time is saved as a result of staff being able to remain in their usual working environment. • Meetings can be recorded and reviewed at a later date. • Allows face-to-face communication to take place more frequently with remote locations. • Allows interaction between participants who are in different locations.	Time is saved as a result of staff being able to remain in their usual working environment. This is good because staff can be more productive. = 1 mark

Chapter 2: Time and task management

	Question and answers	Command word tip and example answer
Q1	**Identify** four of the time stealers that are mentioned in the case study and outline how these can be resolved. (8)	**State each one briefly.**
	• 50 unread emails. • Phone is always ringing with people asking her to do different tasks. • She has to check the company Twitter account and reply to any messages. • Colleagues come over and speak to her for up to 15 minutes at a time.	50 unread emails. = 1 mark
Q2	Amal has a buddy meeting to attend. Besides a buddy system, **describe** other ways that targets can be monitored and controlled. (3)	**Give a description and use examples where possible within the description. Try to get 'this means' into your answer.**
	• Random or sample checks of work where some, but not all, tasks are looked over by the immediate superior. • Line manager checks, whereby a completed task is also undertaken by the immediate superior in order to pinpoint if there are any problem areas or to ensure results obtained are the same. • Mentoring systems, where an employee who is familiar with all the details of the job or organisation acts as mentor. The mentor will be able to offer training, and can give short-term targets and guidance for next steps. • Gantt charts, which show at a glance whether or not projects are on schedule – key milestones are marked on the chart. • Audits and system checks, whereby existing procedures are reviewed and, if necessary, amended in order to bring greater efficiencies or improved work practices. • Regular meetings between staff and line managers.	One way that targets can be monitored is through a sample check. This means that some of the tasks are looked over by the immediate supervisor. = 1 mark
Q3	Amal has been told to make her targets for her PDP SMART. **Describe** what is meant by a SMART target. (5)	**Give a description and use examples where possible within the description. Try to get 'this means' into your answer.**
	• **Specific**: The targets must be well defined and state exactly what is required or what is to be achieved. • **Measurable**: What will be the measurement unit to see whether or not the target has been achieved? The results must be quantifiable and be expressed in some form of measure to check performance. • **Agreed**: Has she discussed and agreed the targets with her line manager? The target must be discussed and agreed between both parties before being implemented. • **Realistic**: ... but challenging. Does she have the necessary knowledge and/or skills to complete the target or has an over-ambitious target been set? • **Timed**: Has she set a completion date? It is important that key dates and timescales are agreed at the point of setting targets.	The targets must be specific. This means the targets must be well defined and state exactly what is required or what is to be achieved. = 1 mark

	Question and answers	Command word tip and example answer
Q4	**Describe** time and task management skills that an Administrative Assistant should have. (4)	**Give a description and use examples where possible within the description. Try to get 'this means' into your answer.**
	• **Organisation**: Looking ahead and planning, but also monitoring progress and achievement. Making sure that all employees have a valuable task to perform. • **Prioritising**: Identifying urgent tasks and highlighting those tasks that can be delegated. • **Delegation**: Deciding when it would be appropriate to ask someone else to do some of the tasks. The person being asked to do the task must have the relevant knowledge and skills. Delegating means the manager can focus on key tasks so deadlines can be met. It can also motivate junior staff. • **Resource management**: Making effective use of time, staff and equipment. • **Controlling**: Being able to control resources and being able to create and work in a calm and relaxed environment. • **Planning**: Looking ahead and identifying potential opportunities and threats by setting targets and strategies for future projects. • **Directing**: Directing clearly to avoid time wasting through lack of understanding. Setting the standards required to undertake duties effectively and efficiently. Instructing colleagues how to undertake duties.	A time and task management skill is to be organised. This means looking ahead and planning and monitoring progress and achievement. = 1 mark
Q5	**Explain** the consequences to the organisation that has employees who have poor time and task management skills. (5)	**Give a definition and then give an impact.** **If the question is asking for an advantage, give a definition and say 'this is good because' and then give an impact.** **If the question asks for a disadvantage, give a definition and say 'this is bad because' and then give an impact.**
	• Work is often incomplete or not submitted on time which leads to a reduction in productivity. • As employees are more stressed at work, absence increases which leads to greater workload. • Staff who are unmotivated with low job satisfaction are more likely to leave the organisation. • Poor employee relations encourage a bad atmosphere which will damage the reputation of the business. • The inefficiency and the ineffectiveness of the organisation will lead to poor customer service, leading to decreasing profits.	A consequence to the organisation of having employees who have poor time and task management skills is that the work is often incomplete or not submitted on time. This is bad because there is a reduction in productivity. = 1 mark
Q6	**Explain** the benefits to the employee of good time and task management. (5)	**Give a definition and then give an impact.** **If the question is asking for an advantage, give a definition and say 'this is good because' and then give an impact.** **If the question asks for a disadvantage, give a definition and say 'this is bad because' and then give an impact.**

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	Question and answers	Command word tip and example answer
	• Tasks are completed to a high standard and on time, which leads to high self-esteem. • Employees will feel less stressed in the workplace, therefore making them more productive. • As employees feel less stressed, their job satisfaction increases which will improve morale and motivation. • There are better working relationships between employees and management as there is no tension between workload and quality. • Generally speaking, employees who are working to a high standard are more likely to achieve a promotion, increasing salary and status.	A benefit to the employees of good time and task management is that tasks are completed to a high standard and on time. This is good because it leads to high self-esteem. = 1 mark

Chapter 3: Effective teams

	Question and answers	Command word tip and example answer
Q1	There is conflict within the teams at Millhouse School Tours. **Outline** the four stages of team formation that should take place for a team to be successful. (4)	**Give a brief statement – a short sentence.**
	Stage 1: Forming • This is the stage where team members are selected and introduced to one another. • It involves a period of orientation and getting acquainted with one another and therefore means that at this point the team is not very efficient. **Stage 2: Storming** • The storming stage is the most difficult and critical stage to pass through. • It is a period marked by conflict and competition as individual personalities emerge. • To get through this stage, members must work to overcome obstacles, to accept individual differences and to work through conflicting ideas on team and task goals. **Stage 3: Norming** • Team members are beginning to work together to undertake the task at hand or solve problems. • Team performance increases during this stage as members learn to co-operate and begin to focus on team goals. • Routines and behaviours become 'normalised' and part of team dynamics. **Stage 4: Performing** • At this point, there is a clear and stable structure and members are committed to the team's mission. • Problems and conflicts still emerge, but they are dealt with constructively. • The team is at its most effective at this point. **Stage 5: Adjourning** • By this stage most, if not all, of the team's goals have been accomplished. • The emphasis is on wrapping up final tasks and documenting the effort and results. • Some team members may have been re-employed elsewhere.	'Forming' is the stage where team members are selected and introduced to one another, so at this point the team is not very efficient. = 1 mark

	Question and answers	Command word tip and example answer
Q2	For a team to be successful, the members need to have different skills. **Describe** the different skills that team members should have for the team to be successful. (4)	**Give a description and use examples where possible within the description. Try to get 'this means' into your answer.**
	• **Leadership skills**: A leader is someone who influences others towards the achievement of goals. A good leader will be able to motivate the team by setting a clear vision and communicating information to team members. A good leader will provide support to all members of the team and will try to minimise conflict. • **Listening skills**: Team members should be able to listen to each other's ideas and points of view. • **Communication skills**: Team members should be able to put their thoughts into words for everyone to understand. Team members should be able to communicate both verbally and in writing.	One skill that a team should have is leadership skills. This means that the person with leadership skills will influence others to achieve the goals of the team. = 1 mark
	• **Delegation skills**: Team members should know when to ask someone to do a task. A good team leader will know who to delegate to as they will be aware of that person's knowledge and skills. Individuals in the team will feel more motivated because they feel valued and trusted.	
Q3	**Describe** six of Belbin's Team Roles. (6)	**Give a description and use examples where possible within the description. Try to get 'this means' into your answer.**
	The Implementer: This is the person who turns the idea into actions and is keen to start tasks. **The Motivator**: This is the person who is willing to overcome obstacles. **The Finisher**: This is the person who keeps an eye on deadlines and ensures completion of tasks. **The Ideas Person**: This is the person who is creative, imaginative and can solve problems. **The Specialist**: This is the person who has the specialist skills or expertise required for success (finance or marketing, etc.). **The Go Getter**: This is the person who networks, sources contracts and accesses resources. **The Organiser**: This is the person who can forward plan, co-ordinate, delegate and is decisive. **The Team Player**: This is the person who cares for others, minimises conflicts and listens carefully. **The Checker**: This is the person who monitors and evaluates the work.	One role is the Implementer. This means the idea is turned into actions and this person is keen to start tasks. = 1 mark
Q4	**Discuss** the advantages to the employee and organisation of being part of a team. (8)	**Give advantages and disadvantages where possible. Use examples if you can in your answer and make a conclusion where possible.**
	Employee **Improved morale and motivation**: Individuals working in a team will have a greater sense of involvement and this can improve job satisfaction. **Shared knowledge and skill**: Teams can greatly benefit from sharing ideas and knowledge with one another, which can help develop an individual's role within the organisation.	One advantage to the employee of being part of a team is that the employee will have improved morale which will improve job satisfaction. = 1 mark An advantage to the organisation of being part of a team is that the workforce can multi-skill, meaning they can cover and work in different departments if needed. = 2nd mark

	Question and answers	Command word tip and example answer
	Risk taking: Individuals working in teams have the ability to share the risk, which encourages them to try out new ideas that they might not have tried as an individual. **Sense of being valued and belonging**: Individuals working in a team may have an increased feeling of belonging and team identity. **Organisation** **Multi-skilling**: Teams allow the workforce to be more flexible and to adapt to needs as required. For example, if a member of staff is absent, other members of the team can cover their duties between them. **Responsibility**: Effective teams need less supervision, as they are more likely to take on more responsibility. This could result in layers of management being reduced, which would reduce costs for an organisation.	
	Higher productivity: The organisation could benefit from improved productivity and lower staff turnover because of the improved morale and motivation of employees. **Risk taking**: Teams are more likely to take risks and this can give an organisation a competitive edge.	
Q5	**Describe** the reason some teams are more effective than others. (5)	**Give a description and use examples where possible within the description. Try to get 'this means' into your answer.**
	• **Attitude to risk**: Effective teams must be willing to accept risks and attempt new procedures and activities. Success is best achieved through calculated risk and leaders must ensure they have considered all of the options before making decisions. • **Team composition**: The team should be made up of individuals with varied skills, qualities and experience (Belbin). A variety of positive traits will ensure that the team is more likely to achieve their strategic aims. • **Interdependence**: Team members should rely and be dependent on other team members who possess different skills, qualities and experience. No one individual has all the skills and correct answers and each team member should make a valuable contribution to the success of the team. • **Time together**: Effective teams should be given ample time to work and develop together. Time should be taken at the start to develop positive relationships in order to be successful through the project. • **Shared goals**: All team members should share the same common goal and purpose. By believing 100% in the shared purpose of the team, it is more likely that all team members will give their full effort to completion of the tasks. This will reduce team animosity and the likelihood of conflict, while improving efficiencies.	One reason some teams are more effective than others is because they have a positive attitude to risk. This means effective teams must be willing to accept risks and attempt new procedures to be successful. = 1 mark

	Question and answers	Command word tip and example answer
	• **Nature of the task**: Each and every team member should believe in the task to be undertaken and contribute 100% to achieving the SMART targets and strategic aims. The more involved each team member feels, the more effective the team is likely to be. • **Positive environment**: There should be a positive culture and ethos within a team in order for it to be successful. Leaders should facilitate an atmosphere of positivity and consistent growth. By doing so, they will allow each member of the team to develop further and enhance their skills and experience.	
Q6	Using information from the case study, **describe** three different strategies Fraser should use to make his team more effective. (3)	**Give a description and use examples where possible within the description. Try to get 'this means' into your answer.**
	• In past projects, his team have not worked very well together because no one wants to take control and use their initiative. Before the team starts work, it should work through Tuckman's stages of development. • The team was appointed by the Regional Manager and it is up to Fraser to work with his team. Fraser should be in control of the recruitment stage as he is the one who is having to work with the staff.	In past projects, his team have not worked very well together because no one wants to take control and use their initiative. When Fraser is setting up the team, he should use Tuckman's stages of team development. This means that the team will form better and be more productive when in a team environment. = 1 mark
	• Fraser has noticed that the people in the team have very similar skills, which means that when it comes to working on the task in hand not a lot gets done. Use Belbin's team roles. • He has also noticed that arguments are starting between the team members and they are not mixing well. Use Tuckman's stages of team development to help the team be more effective.	

Chapter 4: Workplace legislation

	Question and answers	Command word tip and example answer
Q1	**Outline** the consequences to Brit Insure of not training their employees in regards to GDPR. (4)	**Give a brief statement – a short sentence.**
	• Customers may lose confidence in the organisation, reducing customer footfall. • Competitors may become more appealing, reducing market share. • Legal penalties and extensive fines may be imposed, which will increase costs. • High-profile cases will be well publicised, leading to a bad reputation. • Sales and profits will fall as customers begin to use other providers. • Criminal prosecutions may be brought due to negligence or manslaughter.	Customers may lose confidence in the organisation, reducing customer footfall. = 1 mark
Q2	Brit Insure has breached GDPR. **Describe** the principles of this legislation. (4)	**Give a description and use examples where possible within the description. Try to get 'this means' into your answer.**

	Question and answers	Command word tip and example answer
	Transparency: Personal data has to be processed in a lawful and honest manner, ensuring fairness towards the individual. **Purpose limitation**: Organisations must have specific reasons for processing the data and these purposes must be highlighted. **Data minimisation**: Organisations must only collect data related to fulfilling the specific reasons. **Accuracy**: Organisations must ensure the accuracy of the data and directly relate this to the specific reasons. **Storage limitation**: The collected data should not be stored for longer than necessary. **Integrity and confidentiality**: Appropriate technical and organisational safeguards must be in place to ensure personal data is secure. **Accountability**: All organisations that process personal data must demonstrate compliance with each of the above principles.	The principles of GDPR are that personal data has to be processed in a lawful and honest manner. This means ensuring fairness towards the individual. = 1 mark
Q3	**Describe** the role of the Health and Safety Executive. (2)	**Give a description and use examples where possible within the description. Try to get 'this means' into your answer.**
	• The Health and Safety Executive (HSE) is the organisation responsible for holding organisations to account concerning health and safety legislation. • The HSE investigates breaches of legislation by organisations relating to health and safety. It aims to resolve issues and provide employers with solutions to problems they are experiencing regarding health and safety. It also aims to mitigate the workplace hazards which can lead to injury, illness, harm or even death.	The Health and Safety Executive is responsible for holding organisations accountable with regard to health and safety. This means if an organisation is not following health and safety legislation, then the Health and Safety Executive will investigate the incident. = 1 mark
Q4	Items of legislation can change. **Describe** the ways in which an organisation can communicate a change in legislation to their employees. (4)	**Give a description and use examples where possible within the description. Try to get 'this means' into your answer.**
	• **Induction training**: New employees receive a copy of a company's health and safety policy and may be given familiarisation sessions. • **Ongoing training**: This might include safe use of equipment, safe lifting and handling. • **Use of notices**: This could include posting fire alarm procedures, caution signs, no-smoking signs. • **Demonstrations**: Such as first aid, fire drills, evacuation simulations. • **Organisational handbook**: This is distributed to staff or made readily available and usually includes health and safety policies and procedures. • **Advice sessions**: Either from the organisation's health and safety officer or from outside agencies for specific issues. • **Intranet**: For accessing health and safety information. • **Introducing a health and safety representative**: They should be available for advice and provide information on all aspects of health and safety.	One way an organisation can communicate a change in legislation to their employees is by holding induction training. This means new employees will receive a copy of the company's health and safety policy. = 1 mark

	Question and answers	Command word tip and example answer
Q5	**Describe** the role of the employer in regards to the Health and Safety at Work Act 1974. (4)	**Give a description and use examples where possible within the description. Try to get 'this means' into your answer.**
	• Provide a safe place of work for employees, including safe access and exits and ensure that entrances and exits are clearly marked. • Provide safe equipment and ongoing maintenance of equipment and ensure that regular checks are made on equipment and machinery. • Provide information about safety in the workplace and provide training programmes and advice to employees. • Provide information to all employees about safety in the workplace by displaying health and safety information on noticeboards. • Provide a written health and safety policy, circulate written statements and ensure that details are kept up to date. • Provide a safety representative to represent employees' needs.	The role of the employer with regard to the Health and Safety at Work Act is to provide a safe place of work for employees. This means having safe access to and exits from the building. = 1 mark
Q6	**Describe** the following data handling legislation: • Copyright, Designs and Patents Act 1988 • Freedom of Information Act 2000 • Computer Misuse Act 1990. (3)	**Give a description and use examples where possible within the description. Try to get 'this means' into your answer.**

	Copyright, Design and Patents Act 1988
	• The Copyright, Designs and Patents Act 1988 gives the creators of certain media channels (e.g. books, films, games, music) rights to control how their creations are used and distributed.
	• When you buy software, for example, copyright law forbids you from:
	  ◦ giving a copy to a friend
	  ◦ making a copy and then selling it
	  ◦ using the software on a network (unless the licence allows it)
	  ◦ renting the software without the permission of the copyright holder.
		The Copyright, Design and Patents Act 1988 gives the creator the right to control how their creations are distributed. This means the creator needs to give permission for someone else to use the work. = 1 mark

	Freedom of Information Act 2000
	• The Freedom of Information Act 2000 allows members of the public to access certain documents, policies and reports from public sector organisations and authorities.
	• Public bodies are now duty bound to release and publish information that is in the interests of wider society or local communities.
	• Members of the public are within their rights to request access to unclassified information.
	Computer Misuse Act 1990
	• The Computer Misuse Act 1990 prohibits unlawful access to computer systems. This law makes it illegal to:
	  ◦ access computer systems without permission, for example by hacking
	  ◦ access computer systems with the intention of committing a criminal offence
	  ◦ access a computer system to change or alter details without permission
	  ◦ make, provide and supply any equipment that could facilitate a computer misuse offence.	

	Question and answers	Command word tip and example answer
Q7	**Explain** the consequences to the employee of not complying with legislation after they have been trained about it. (3)	**Give a definition and then give an impact.** **If the question is asking for an advantage, give a definition and say 'this is good because' and then give an impact.** **If the question asks for a disadvantage, give a definition and say 'this is bad because' and then give an impact.**
	• A verbal warning • A written warning • Summary dismissal • Referral to the police • Civil and criminal prosecution	The consequences to the employee of not complying with legislation is that they will get a verbal warning. This is bad because it will give the employee a negative reputation. = 1 mark
Q8	**Describe** the role of the employer with regard to the display screen legislation. (6)	**Give a description and use examples where possible within the description. Try to get 'this means' into your answer.**
	These regulations require employers to: • examine workstations and ensure that they are suitable for the work to be carried out • ensure that workstations meet minimum requirements: the VDU can be adjusted with brightness and contrast, adjustable chairs are provided, footrests are provided if requested, keyboards can be adjusted and are separate from the screen • ensure that employees are given breaks or can change activity away from the VDU • provide eye tests if the employee requests this and provide glasses or contact lenses if special ones are needed for VDU work • consult with all staff members who use VDUs about the nature and arrangements of their work • examine workstations to assess and reduce the potential risks (e.g. seating, desk height, lighting) • provide safety equipment upon request (e.g. anti-glare screens, adjustable mice, rested keyboards) • offer extensive and up-to-date training on performing duties to mitigate risks or hazards • provide regular eye tests upon request and provide specialist spectacles if required • break up repetitive tasks or provide regular comfort breaks to avoid muscular or stress-related conditions • continually review and assess the situation in light of any changes.	The role of the employers with regard to the display screen legislation is that they must ensure workstations meet minimum requirements for employees. = 1 mark

Chapter 5: The working environment

	Question and answers	Command word tip and example answer
Q1	Esme is having to homework. **Outline** what homeworking is. (2)	**Give a brief statement – a short sentence.**
	• Homeworking is where employees are able to complete their work away from the office at home. • The employee will keep in touch with the office using ICT and may have to go into the office once every fortnight to update with progress.	This is where employees are able to complete their work away from the office, at home. = 1 mark
Q2	Esme had considered taking a career break. **Describe** what a career break is and **justify** the advantages to the organisation of offering career breaks. (3)	**Give a description and use examples where possible within the description. Try to get 'this means' into your answer.** **You must be able to give reasons (justify) why a certain course of action is being taken (an advantage).**

	• Different organisations offer different kinds of breaks. Most common are when employees take time off to have a family or take an extended break to go travelling.
	• Possible justifications for taking a career break:
	  • Employees will be more motivated if they know they have a job to come back to.
	  • Employees will come back refreshed after the break and will be more motivated.
	  • It will give the organisation a good reputation and a competitive edge.
		A career break is when an employee is allowed to take a period of time off to pursue other interests. This means the employee will not get paid but their job is left open to them. = 1 mark
		An advantage of this is that it will motivate employees as they will be refreshed after their break. = 2nd mark

Q3	**Describe** ergonomic features. (3)	**Give a description and use examples where possible within the description. Try to get 'this means' into your answer.**
	Ergonomic features include the following: • office furniture • decor • lighting • equipment • temperature • ventilation • layout.	One ergonomic feature is the lighting. This means that the lighting must be able to be altered to avoid staff getting headaches from eye strain. = 1 mark
Q4	Esme has excellent file management skills. **Discuss** the benefits to an employee and employer of good file management skills. (4)	**State the answer and then explain the impact that it will have, for example, 'this will lead to'. Use advantages and disadvantages if possible.**
	The consequences of good file management skills include the following: • Targets have a better chance of being met. • The information that the organisation stores is accurate and will be reliable. • Information can be found by different employees. • The business's reputation will be enhanced if information can be found promptly, meaning an increase in customer satisfaction.	One benefit of excellent file management skills to the employee is it means targets have a better chance of being met. = 1 mark One benefit of excellent file management skills to the employer is it gives the business a good reputation so there is repeat custom. = 2nd mark

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	Question and answers	Command word tip and example answer
Q5	When working from home, Esme uses LAN. **Explain** the advantages of using LAN. (2)	**Give a definition and then give an impact.** **If the question is asking for an advantage, give a definition and say 'this is good because' and then give an impact.** **If the question asks for a disadvantage, give a definition and say 'this is bad because' and then give an impact.**
	• Easy to share peripherals such as printers and photocopiers, which can reduce costs. • Makes it easier to share files and information with employees. • Back-ups can be made on a regular basis, which reduces the chance of losing files. • Security can be set to restrict access to certain areas of the network (access rights).	One advantage of using LAN when working from home is it is easy to share peripherals such as printers and photocopiers, which can reduce costs to. This is good because it will make Esme more productive. = 1 mark
Q6	**Discuss** an open-plan office layout. (6)	**Give advantages and disadvantages where possible. Use examples if you can in your answer and make a conclusion if possible.**
	Advantages of an open-plan layout • Resources and equipment can easily be shared among employees, reducing the financial cost of duplicating items. • Allows for easier management and supervision of employees without imposing on them. • Staff morale is improved as they are not working independently all day, improving motivation and rapport. • The layout is more flexible and can be easily changed for future expansion or changing priorities. **Disadvantages of an open-plan layout** • There can be a lack of privacy for employees dealing with confidential and sensitive information or personal issues. • The office is generally more noisy, which can be a distraction to employees, reducing productivity. • Heating and lighting cannot be altered to individual requirements, which can cause problems in terms of health and welfare. • It encourages non-work related discussions among employees, preventing workflow. • More common for time stealers to be present, affecting time and task management.	One advantage of an open-plan layout is that it allows for easier management and supervision of employees without imposing on them. = 1 mark One disadvantage of an open-plan layout is there can be a lack of privacy for employees dealing with confidential and sensitive information or personal issues. = 2nd mark.
Q7	EuroExplore offer homeworking and career breaks for their employees. **Discuss** the use of flexible working practices to the employee. (6)	**Give advantages and disadvantages where possible. Use examples if you can in your answer and make a conclusion if possible.**

	Question and answers	Command word tip and example answer
	Advantages of flexible working practices to the employee • Due to not being in the working environment excessively, employees are generally less stressed as they have more time to 'recharge'. • Greater choice concerning where to work, when to work and how regularly they need to attend their working environment. • Significant reduction in terms of travel, which has a financial saving as well as providing employees with more time to be productive. • The opportunity to work flexibly allows greater access and inclusiveness for those with disabilities. • Makes it easier for employees to achieve a work–life balance, juggling their personal lives alongside their professional lives. **Disadvantages of flexible working practices to the employee** • Employees can feel isolated and unsupported if they are working predominantly at home, away from the support mechanisms of the workplace. • Employees may not be able to access opportunities such as staff development and training. • There can be a de-personalisation of space and environment, which can have a negative impact on employees' wellbeing. • It can be increasingly difficult to form, maintain and develop relationships among colleagues and line management. • Difficult to balance home life and work; more distractions arising from personal issues. May struggle to 'switch off' from work when at home.	One advantage of flexible working practices to the employee is employees are generally less stressed as they have more time to 'recharge'. = 1 mark A disadvantage of flexible working practices is employees can feel isolated and unsupported if they are working predominantly at home, away from the support mechanisms of the workplace. = 2nd mark
Q8	**Describe** absence management procedures that can be put in place by an organisation. (4)	**Give a description and use examples where possible within the description. Try to get 'this means' into your answer.**
	There are a number of absence management procedures which can be put into place by an organisation: • Keep in contact with absent employees and keep them informed of what is happening in their absence. • Arrange back-to-work interviews to allow for a more coherent return to work. • Agree staged return-to-work, i.e. reduced hours, part-time days. • Arrange to see occupational health, doctors, etc. • Use disciplinary procedures, if appropriate, for recurring, inappropriate short-term absences.	An absence management procedure is keeping in contact with absent employees. This means keeping them informed of what is happening in their absence. = 1 mark

Chapter 6: Customer care

	Question and answers	Command word tip and example answer
Q1	**Outline** the ways an organisation can demonstrate having good customer service. (3)	**Give a brief statement – a short sentence.**
	• Creative problem solving. • Selling a quality product. • Customer self-service. • After-sales service. • Being polite to customers and showing an interest.	One way an organisation can demonstrate having good customer service is by selling a quality product. = 1 mark
Q2	**Outline** the features of an effective complaints procedure FashionUnique might use. (4)	**Give a brief statement – a short sentence.**
	• The complaints procedure should be made available to customers and known to all staff. • Complaints (regardless of how they are made – verbal, email, phone, in person or written) should be logged and acknowledged immediately by someone in the organisation trained in handling complaints, usually in writing. • The customer should receive details outlining the process of investigation and clear timelines should be established to ensure prompt investigation. For example, 'We will investigate your complaint and contact you again within seven days.' • The customer should be kept informed of progress and the result of the investigation. Compensation might be offered. Details should be provided so an appeal/further action can be made, e.g. to the Ombudsman. • Employees tasked with handling complaints should be trained to listen, establish the facts and agree with the customer what to do next. Often the same person is allocated to deal with the complaint from start to finish so the customer knows who to refer to. • Complaints should be reviewed regularly by a senior member of management to identify patterns or particular problems.	One feature of an effective complaints procedure is that the company deals with the complaint as quickly as possible. = 1 mark
Q3	**Explain** the consequences to the organisation of bad customer service. (4)	**Give a definition and then give an impact. If the question asks for an advantage, give a definition and say 'this is good because' and then give an impact. If the question asks for a disadvantage, give a definition and say 'this is bad because' and then give an impact.**
	• Bad publicity results from poor customer service, as people always tell others about their experiences. • A poor reputation is difficult for an organisation to lose and a poor reputation also has implications for recruitment, falling market share and the impact of any advertising the organisation undertakes. • Dissatisfied customers do not come back. Many people do not complain about poor service, they simply do not return, resulting in falling income. Think of how you react to a disappointing meal in a restaurant. • In extreme cases, the organisation may be subject to legal action. This will involve legal costs for the company and may involve compensation payments. • Increased resources have to be spent on sorting out problems with customers. These resources could be used elsewhere in the business.	A consequence of bad customer service to the organisation is that the organisation will get bad publicity, resulting in a reduction in customer footfall. = 1 mark

	Question and answers	Command word tip and example answer
Q4	**Explain** the benefits to the organisation of providing good customer service. (4)	**Give a definition and then give an impact. If the question is asking for an advantage, give a definition and say 'this is good because' and then give an impact. If the question asks for a disadvantage, give a definition and say 'this is bad because' and then give an impact.**
	• Satisfied customers are much more likely to come back and repeat business. • Satisfied and motivated employees work better together as a team. • Low employee turnover means that employees do not leave the organisation so less money is spent on recruiting and training new staff. • Reduced costs as attracting new customers is costly in terms of advertising and sales promotions. • A good reputation enables a business to attract customers and will attract good staff as well. • May result in giving the organisation a competitive edge, increased market share and bigger turnover.	One benefit to the organisation of providing good customer service is that satisfied customers will come back. This will lead to an increase in sales. = 1 mark
Q5	**Describe** ways an organisation can monitor customer care. (5)	**Give a description and use examples where possible within the description. Try to get 'this means' into your answer.**
	Customer focus groups Listening to customers means finding out what they are saying. There are various ways of collecting the information required. Customer focus groups are small groups of customers brought together to provide the organisation with feedback on their goods and services, proposed new products and deletion of lines no longer profitable. **Satisfaction surveys** The most formal method of measuring customer satisfaction is to use a questionnaire. These questionnaires or written surveys provide a permanent record of what customers feel and the results can be analysed for statistical purposes. **Written surveys** A written survey is usually a form running to several pages that asks for the customers' opinions on products and services. **Telephone surveys** There has been a huge rise recently in the use of call centres to carry out telephone surveys. Most surveys are outsourced by organisations. Customers are telephoned to find out their opinions regarding goods and services. **Comment cards** Comment cards are small cards that are left in areas where customers can quickly complete them, e.g. while waiting at reception or in hotel rooms. **Online feedback surveys** Increasingly, online surveys are being used as people find it quick and simple to complete online forms. Customers respond to a series of questions online, often as a link from an email.	One way organisations can monitor customer care is by having customer focus groups. This means listening to customers and finding out what they are saying about the product. = 1 mark

	Question and answers	Command word tip and example answer
	Face-to-face interviews Organisations employ people to stop customers in the street to interview them on a one-to-one basis to find out their opinions on products and services. **Mystery shopper** A mystery shopper is someone who is employed to act as a customer and report back on the service they receive. This information is given to staff and any concerns regarding poor standards can be rectified. Praise may also be given to staff if the mystery customer has a good experience.	
Q6	**Discuss** the ways an organisation can monitor customer care. (6)	**Give advantages and disadvantages where possible. Use examples if you can in your answer and make a conclusion if possible.**
	Customer focus groups **Advantages** • Can provide instant feedback on products and services. • Can provide opinions on proposed new products and services. • Can make suggestions on how improvements can be made. • Customers feel they are being listened to which encourages brand loyalty. • Clarification can be sought on points from customers. **Disadvantages** • Only provides a viewpoint from small number of customers. • All customers cannot be invited to attend so the organisation is sampling responses. • Events tend to be held irregularly. • Expensive to run – expenses have to be paid and accommodation booked for meetings. **Written surveys** **Advantages** • Feedback on a wide range of areas including products, service received, staff attitudes and knowledge can be sought. • Information can be easily gathered and collated to produce a report. • Variety of types of questions, such as tick box, open-ended, etc. can be used. • Able to get viewpoint from wide range of customers. • Incentives can be given to complete and return, e.g. prize draws, free products. **Disadvantages** • Time consuming for customers to complete which can result in a low completion rate. • Poor number of returns from customers. • Wording of question is crucial – questions should be pre-tested using a pilot survey. • Many questions based on tick boxes – tends to be inflexible. **Telephone surveys** **Advantages** • Immediate response to a range of carefully worded questions. • Customers are able to give feedback to questions and also make unprompted suggestions.	One way of monitoring customer care is using a customer focus group. An advantage of using this is you can get instant feedback on products and services. = 1 mark A disadvantage of customer focus groups is there is only a viewpoint from a small number of customers. = 2nd mark

	Question and answers	Command word tip and example answer
	● A wide range of customers can be targeted. ● Issues can be clarified and questioned in depth in response to customer comments. **Disadvantages** ● Time consuming to gather information for organisations. ● Many customers are reluctant to spend time going through a questionnaire. **Comment cards** **Advantages** ● Quick to complete – a small card with several carefully structured questions. ● Simple to complete – usually a tick box to indicate degree of satisfaction, e.g. always satisfied, usually satisfied, sometimes satisfied, etc. ● Can be given to customers to complete while waiting, e.g. at hotel reception to check out. ● More likely to get higher number of returns than with a full questionnaire. **Disadvantages** ● Not much space for comments or suggestions. ● Usually focuses on only one or two aspects of service. **Online feedback** **Advantages** ● Forms are user friendly and not time consuming to complete. ● Customers can complete them at their leisure. ● Feedback data can be collated automatically by service provider. ● More likely to get a high volume of responses than with a written survey. **Disadvantages** ● Not all customers necessarily have email/internet facility. ● Customers who do not have IT skills find it difficult to complete online forms. **Face-to-face interviews** **Advantages** ● Useful for gauging customer reactions including body language. ● Immediate response given by customers. ● Issues can be clarified and questioned in depth in response to customer comments. **Disadvantages** ● Time consuming and expensive to collect data. ● Many customers are reluctant to take the time to participate. **Mystery shopper** **Advantages** ● Gives a clear sample of what a potential customer might experience. ● Gives a starting point for other types of survey. **Disadvantages** ● Does not allow for variations in the standard of service throughout the organisation. ● Only assesses front-line customer service.	

	Question and answers	Command word tip and example answer
Q7	**Explain** the negative impact of using social media to complain about a service. (4)	**Give a definition and then give an impact. If the question is asking for an advantage, then give a definition and say 'this is good because' and then give an impact. If the question asks for a disadvantage, then give a definition and say 'this is bad because' and then give an impact.**
	● Social media is in the public domain so negative comments can be seen by others, which will lead to other negative comments on non-related matters. ● Can damage the reputation of the organisation. ● Volume of tweets may mean that the organisation misses the complaint, which will delay the response and give the organisation a bad reputation. ● May require a dedicated member of staff to read tweets or software to be developed to scan social media for comments – cost implications. ● Lacks privacy to deal with sensitive issues. ● Difficult to build trust/rapport with customers online. ● Difficult for the organisation to retain staff or recruit. ● May result in a breach of legislation if an employee does not respond appropriately or have the right training. ● Restriction in characters – often requires an additional communication method, such as the telephone, to resolve complex matters.	A consequence of using social media to complain about a service is that it could damage the reputation of the firm. This is bad because the organisation could lose its competitive edge. = 1 mark

Chapter 7: Methods of communication

	Question and answers	Command word tip and example answer
Q1	**Describe** the following methods of communication: ● written ● visual. (2)	**Give a description and use examples where possible within the description. Try to get 'this means' into your answer.**
	Written ● Used when important information needs to be communicated in full. It provides a permanent record that can be used for future reference. ● It also allows individuals the time to read and fully understand the information before acting upon it. **Visual** ● This can be an effective way of communicating complex information to groups of staff. ● Pictures, graphs, sound and different formats can be used to effectively engage listeners and sustain their attention.	Written information is used when you need a permanent record. This means that it can be used for future reference. = 1 mark
Q2	**Identify** barriers to communication which affected the quality of communication at the presentation. (8)	**Briefly describe the barriers which affected the quality of the communication from the case study.**

	Question and answers	Command word tip and example answer
	• 30 members of staff arrived 30 minutes late to the presentation because they had been told the wrong time. • Staff in departments such as Operations and Human Resources could not see the relevance to them as they do not deal with customers, and quickly became bored due to a lack of understanding. • Jack became agitated as he could hear the sound of mobile phones. • The writing was so small it could not be read by some staff in the rows at the back. • The presentation lasted an hour and a half and Olivia had crammed a lot of policies, research and procedures into the slides. • Older and experienced members of staff felt that they were being 'told off' by Jack for not meeting sales targets. • Loud drilling from the outside roadworks could be heard. • A member of the Finance Department closed the windows but that made the temperature of the room uncomfortably hot. • Once Jack had finished talking, he immediately returned to his office and did not engage with any staff, still feeling annoyed about the use of mobile phones.	30 members of staff arrived 30 minutes late to the presentation because they had been told the wrong time. = 1 mark
Q3	**Describe** solutions to each barrier to communication identified above. (8)	**Give a description and use examples where possible within the description. Try to get 'this means' into your answer.**
	• Make sure that you double check that everyone has been invited for the same time. • Make sure that it is only relevant staff invited/tailor to the presentation to your audience • Politely ask the audience to put all mobile phones on silent. • Enhance the font and make the font clear so the whole audience can see it. • Try to engage the audience with different media and keep information to a minimum – issue handouts for the other information. • Be empathetic when talking about poor results and focus on what can be done differently so that there is an improvement. • Speak to the work people drilling outside and explain that there is going to be a presentation. • Use the air conditioning facilities in the room. • Have a designated section in the presentation where people can ask questions if they wish.	Make sure that you double check that everyone has been invited for the same time. This means making sure that the Administrative Assistant has included the necessary people and no one is double booked. = 1 mark
Q4	**Explain** the consequences of ineffective communication to an organisation. (4)	**Give a definition and then give an impact.** **If the question is asking for an advantage, give a definition and say 'this is good because' and then give an impact.** **If the question asks for a disadvantage, give a definition and say 'this is bad because' and then give an impact.**

	Question and answers	Command word tip and example answer
	• Employees may become demotivated, leading to higher rates of absenteeism. • Employees may not understand the task and therefore waste time, leading to low productivity. • Deadlines may be missed, which could result in reduced sales/profits. • Employees may wrongly inform customers, which leads to an increase in complaints. • Poor customer service can damage the image of the firm. • Breakdown in relationships between manager and staff, causing negativity in the workplace/high staff turnover, leading to increased costs in recruitment and training/ impact on customers.	Employees may become demotivated, which is bad because there will be a higher rate of absenteeism for the organisation. = 1 mark
Q5	**Discuss** the advantages and disadvantages of face-to-face communication. (4)	**Give advantages and disadvantages where possible. Use examples if you can in your answer and make a conclusion if possible.**
	Advantages: • The information is quickly and directly transmitted to the interested parties. • It is easier to express feelings/opinions, which avoids possible misunderstandings. • The person receiving the information can ask and answer questions and gather feedback. • Physical gestures aid understanding, e.g. head movement, facial expressions, posture or eye contact. **Disadvantages:** • There is no record of what was said, which can cause problems if there is a disagreement. • Distractions and interruptions can affect the quality of communication. • It may be difficult to control if there is a large number of people talking over one another. • Strong personalities and emotions may cause a barrier and prevent effective exchange of ideas.	One advantage is that the information is quickly and directly transmitted to the interested parties. = 1 mark
Q6	**Explain** the advantages of electronic communication. (4)	**Give a definition and then give an impact.** **If the question is asking for an advantage, give a definition and say 'this is good because' and then give an impact.** **If the question asks for a disadvantage, give a definition and say 'this is bad because' and then give an impact.**
	• Possible to communicate by electronic means 24/7, 365 days of the year. • Information can now be sent instantaneously. • The cost of sending information electronically has fallen greatly. • Gives the organisation a 'modern feel' and meets the expectations of recipients.	One advantage of electronic communication is that it means you can communicate 24/7, 365 days a year. This is good because there will be an increase in productivity. = 1 mark

Answers to practice exam paper

<table>
<tr><th></th><th>Answers</th><th>Marks</th></tr>
<tr><td>Q1(a)</td><td>Outline the possible strategies Lee could use to improve the electronic file management on the company intranet.
Make sure everyone has received training and has signed a declaration.
Make sure that old files that are no longer needed are deleted from the system to free up space.
Make sure files are labelled correctly and in alphabetical order.
There must be a consistent way of filing information that everyone in the organisation used.
Do not allow staff to download files from the internet and use their own personal email.
Put anti virus software on all computers.</td><td>4</td></tr>
<tr><td>(b)</td><td>Outline the skills Lee should have as an Administration Manager.
Reliable, adaptable, good communication skills, IT skills, problem-solving skills, leadership skills, assertiveness and planning skills.</td><td>4</td></tr>
<tr><td>(c)</td><td>Compare the two diary methods used by the organisation.
Both are used to record appointments.
Both can be portable.
Amendments to a paper-based diary can look unprofessional whereas an electronic diary can be easily amended.
Using electronic diary, entries can be made in a number of diaries at the same time, whereas with a paper-based diary each person must update their own.
Electronic diaries have many user-friendly features, e.g. reminders, whereas the user of a paper-based diary must regularly check their diary to keep track of appointments.
Electronic diaries allow for unlimited recurring appointments whereas a user of a paper-based diary must individually enter each appointment.</td><td>2</td></tr>
<tr><td>Q2</td><td>Lee might consider using flexible working practices to make his work more manageable. Describe three working practices and justify why he may want to use these.

Choose three from the following practices and justifications.

Job sharing – This is a working arrangement where two people voluntarily share the duties and responsibilities of one full-time position, with salary, holidays and other benefits shared on a pro-rata basis according to the number of hours worked. Job sharers may work split days, split weeks, alternate weeks or their hours may overlap.

Justification – Staff are more motivated as they have better work/life balance.

Flexitime – Allows an employee to choose, within set limits, the times they start and finish work. The organisation sets a core time where employees must be present, other than for authorised absence. Employees will also be expected to work an agreed number of hours. Employers usually permit an employee to carry over any excess or deficit in hours. Most employers allow time off in lieu if an employee works over their required number of hours.

Justification – There will be a reduction in staff absenteeism as staff can arrange medical appointments around their work easier than with 9 to 5 days.

Homeworking – This is where employees are able to complete their work at home. This will save time travelling to and from the office and can allow employees to remain working despite personal commitments such as having children. The employee will keep in touch with the office using ICT and may have to go into the office once every fortnight to update with progress.

Justification – Staff can be more productive as they can work around different priorities and will be more relaxed in the comfort of their home.

Teleworking – Teleworking allows employees to work remotely, for example while travelling, and keep in touch with the office/their line manager using technologies available to them.

Justification – Staff are more productive as they can work on the move.</td><td>6</td></tr>
</table>

→

	Answers	Marks
	Hot desking – Hot desking is when employees work away from the office, so there may be no need to have a workstation for each person. Instead, employees can use any desk that is free when they need it. This works well for different shift patterns. A hot desk will usually be equipped with a telephone and PC so that employees can access their work. ***Justification –*** The organisation makes financial savings as it needs less office space. **Touchdown areas –** Employees who work away from the office a lot may need to come into the office for a short time. They may just need to send a quick email or meet someone then leave. The touchdown area does not need to be booked. ***Justification*** – The organisation makes financial savings as it needs less office space. **Career break** – Different organisations offer different kinds of breaks. Most common are when parents take time off to have a family or employees take an extended break or to go travelling. ***Justification*** – This gives the organisation a good reputation and makes the employees more motivated.	
Q3	**Discuss the advantages and disadvantages of an open plan office layout.** **Advantages** of an open plan office layout: • Easier to supervise • Promotes teamwork and team spirit • Resources can be shared, which saves money • Less space is wasted. **Disadvantages** of an open plan office layout: • Lack of privacy, so meeting rooms may have to be used • Can be noisy, with lots of distractions • Difficult to suit personal requirements such as lighting/heating • Does not give an individual status.	**6**
Q4	**Explain how an organisation benefits when its employees work as an effective team.** **Multi-skilling** – Teams allow the workforce to be more flexible and to adapt to needs as required, for example if a member of staff is absent, then other members of the team can cover their duties between them. **Responsibility** – Effective teams need less supervision, as they are more likely to take on responsibility. This could result in layers of management being reduced, which would reduce costs for an organisation. **Higher productivity** – Because of the increased morale and motivation of employees, the organisation would benefit from increased productivity and lower staff turnover. **Risk-taking** – Teams are more likely to take risks and this can give an organisation a competitive edge.	**3**
Q5	**Describe the time and task management strategies Lee could use.** **Gantt chart** • This is a chart that a manager could use to allow individuals to see at a glance key dates and the tasks that have to be completed. • It can also be used to monitor when tasks have been completed. • It is used to plot actions on a timeline and can help to ensure that employees are working towards achieving a deadline or that they will complete certain tasks within a specified time. • It will also help to show where tasks or activities may conflict with each other, or to show at which times workload may increase or decrease. This will allow an employee to see where they can take on other tasks or projects and where they may struggle with their workload. • This also contributes to good time and task management as it can help to ensure that employees are not overloaded with work at specific times and that work can be delegated effectively to employees who have sufficient time to complete it. **To-do list** • This is a document that an individual could use on a day-to-day basis to remind them of the tasks that need to be completed. • When complete, the task is ticked off.	

	Answers	Marks
	Priorities list ● Like a To-do list, but this time written out in an order showing which task needs to be tackled first. This ensures that the most important and urgent tasks are tackled first. ● It should contain a mixture of high, low and medium priorities. **Action plan** ● This is a document that could be prepared to help plan a long-term project, e.g. an annual general meeting (AGM). ● It shows the tasks that need to be completed, an estimate of how long the tasks should take and any notes to explain actions. **Electronic diary (e-diary)** ● Useful for arranging meetings as days, weeks and months can be seen at one glance. ● The e-diaries of all participants can be seen at the same time. Most e-diaries have electronic task lists. ● They also have reminder systems to flag up due dates. ● Allow regular meetings or appointments to be entered into the diary in one entry when the recurring entries feature is used. ● Reminders can be set to alert the diary owner that a task or appointment is due. ● Other staff members' diaries can be checked online to schedule meetings or reminders. ● Entries can be searched for specific information or dates. ● Files can be attached to e-diary entries. ● Double-bookings can be flagged up to avoid meetings or activities being booked at the same time. ● An address book facility is included to allow ease of contact with other staff members. **Personal development plan (PDP)** ● A Personal Development Plan is a document which can be used to record an employee's areas of strength and areas of weakness for future development. Targets for improving specific areas can be recorded on the Personal Development Plan along with the methods that may be used to support development and improvement as well as a target timescale for this. ● Employees can identify areas where they feel they have particular strengths and areas where they would like to further develop their knowledge and skills. A Personal Development Plan can be completed by an employee with their line manager or supervisor – this encourages positive discussion and feedback on an employee's performance and future targets. An employee may feel motivated by discussing areas of strength and by planning future training and development with their manager.	**4**
Q6	**Explain the advantages of face-to-face communication.** ● Information is quickly and directly transmitted to the interested parties. ● It is easier to express feelings/opinion which avoids possible misunderstandings. ● The person receiving the information can ask and answer questions and gather feedback. ● Physical gestures aid understanding e.g. head movement, facial expressions, posture or eye contact.	**2**
Q7	**Outline the meanings of the following terms: VLOOKUP, SUMIF, NAMED RANGE.** **VLOOKUP –** This is used in an Excel spreadsheet when you need to find information in a table or a range by row (vertically). For example, look up a price of an automotive part by the part number, or find an employee name based on their employee ID. **SUMIF** – The SUMIF function is a worksheet function that adds all numbers in a range of cells based on one criteria, for example add all the sales from the Aberdeen branch. **NAMED RANGE –** A named range is a range (either a single cell, or a range of cells) to which you assign a name.	**3**
Q8	**Explain how an organisation would gain advantages from providing good service to its customers.** ● Satisfied customers are much more likely to come back and repeat business. ● Reduced costs as attracting new customers is costly in terms of advertising and sales promotions. ● Good reputation enables a business to attract customers and there is also the benefit of ease in attracting good staff. ● Competitive edge. ● Increased market share and bigger turnover.	**3**

→

	Answers	Marks
Q9	**Outline ways an organisation can inform employees of changes in legislation.** • **Induction training** – New employees receive a copy of a company's health and safety policy and may be given familiarisation sessions. • **On-going training** – This might include safe use of equipment, safe lifting and handling. • **Use of notices** – This could include posting fire alarm procedures, caution signs, no-smoking signs. • **Demonstrations** – such as first aid, fire drills, evacuation simulations. • **Organisational handbook** – This is usually distributed to staff or made readily available and may include health and safety policies and procedures. • **Advice sessions** – either from the organisation's health and safety officer or from outside agencies for specific issues. • **Intranet** – for accessing health and safety information. • **Health and safety representative** – They are available for advice and provide information on all aspects of health and safety.	**4**
Q10	**Describe the stages of team formation.** **Forming** – This is the stage where team members are selected and introduced to one another. It involves a period of orientation and getting acquainted with one another and therefore means that at this point the team is not very efficient. **Storming –** The storming stage is the most difficult and critical stage to pass through. It is a period marked by conflict and competition as individual personalities emerge. To get through this stage, members must work to overcome obstacles, to accept individual differences and to work through conflicting ideas on team and task goals. **Norming** – Team members are beginning to start working together to undertake the task at hand or solve problems. Team performance increases during this stage as members learn to cooperate and begin to focus on team goals. Routines and behaviours become 'normalised'/part of team dynamics. **Performing** – There is a clear and stable structure, and members are committed to the team's mission. Problems and conflicts still emerge, but they are dealt with constructively. The team is at its most effective at this point. **Adjourning –** By this stage most, if not all, of the team's goals have been accomplished. The emphasis is on wrapping up final tasks and documenting the effort and results. Some team members may have been re-employed elsewhere.	**4**
Q11	**Distinguish the differences between the role of a Chairperson and the role of an Administrative Assistant during a meeting.** • The Chairperson will decide on the agenda items *whereas* the Administration Assistant will create the agenda and send it to attendees. • The Chairperson will inform the Administration Assistant of the requirements for a venue *whereas* the Administration Assistant will research and book the venue. • The Chairperson will decide/request specific equipment or requirements for the meeting *whereas* the Administration Assistant has to ensure the equipment is booked. • The Chairperson will decide on attendees *whereas* the Administration Assistant invites attendees/sends Notice of Meeting. • The Chairperson will work through the agenda items in order during the meeting *whereas* the Administration Assistant ensures that the minutes are typed up.	**5**

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Page numbers in **bold** indicate information in case studies; page numbers in *italics* indicate key term definitions.

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