



NZQA Assessment Support Material

Unit standard	29027				
Title	Produce business documents using software applications				
Level	3	Credits	15	Version	1

Note

The following guidelines are supplied to enable assessors to carry out valid and consistent assessment using this internal assessment resource.

Assessors must manage authenticity for any assessment from a public source, because students may have access to the assessment schedule or student exemplar material. Use of this assessment resource without modification may mean that students' work is not authentic. The assessor will need to change figures, measurements or data sources or set a different context or topic.

While this resource exemplifies written assessments, there are other assessment activities and approaches that could be taken.

1. See Generic Resources and Guidelines at <https://www.nzqa.govt.nz/providers-partners/assessment-and-moderation-of-standards/assessment-of-standards/generic-resources/>

Assessor guidelines

For authenticity purposes, sample answers have not been provided. These will need to be provided by the Assessment developer.

Context/setting

This assessment activity contains four assessment tasks in which learners need to demonstrate their ability to provide business administration support using business technology.

This assessment is in the context of a fictional business entity called Zirconi Bags and are available from the Business Administration and Technology assessment support material page. The evidence that learners provide for the assessment must meet the requirements of this entity.

AWARD OF CREDIT



To be awarded credit for this unit standard learners must demonstrate your ability to produce business documents using software applications.

CONDITIONS OF ASSESSMENT



This is an **open book assessment** that will take place over a timeframe that you set. Learners' answers must be in their own words.



You will provide learners with information regarding timeframes for this assessment.

Assessment activity

This assessment contains the following tasks:

1. Produce a newsletter (word processing).
2. Perform a mail merge (spreadsheets and word processing).
3. Produce a report with merged data (spreadsheets and word processing).
4. Produce a presentation with merged data (spreadsheets and presentation programme).
5. Give examples of self-management.

Resource requirements

- The following documents were created for the fictional entity Zirconi Bags. You must supply these documents to the learner:
 - Company_style_guide.docx
 - Database_CustomerClubMembers_Oct2016.docx
 - Head_office_location.docx
 - Letter_layout.docx
 - Organisational_chart.xlsx
 - Sales Analysis 2017 smallsuitcase.xlsx
 - Store_locations.docx
 - Total_Weekly_NZ_Shop_Take_WE280816.xlsx
 - Zirconi_retail_structure.docx
 - Zirconi_background_information.docx
 - Zirconi_logo1.jpg
 - Zirconi_logo2.jpg
 - Zirconi_logo3.jpg
 - Zirconi_logo4.jpg
- Learners will need access to a computer with Microsoft Word, Excel and PowerPoint, and email facilities

Assessment Schedule

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Outcome 1

Produce business documents using software applications.

Range software applications may include wordprocessing, spreadsheeting, database, desktop publishing, or presentation programmes; evidence of three applications is required.

business documents may include – correspondence, meeting documentation, reports, promotional materials, forms, newsletters, rosters.

ER	Task	Evidence	Judgement
ER 1.1 Display and formatting features are applied to produce business documents that are fit for purpose. Range features may include - font variation, paragraph, header and footer, page and section breaks, tables, columns, bullets and numbering, alignment, lines and borders.			Overarching judgement for ER1.1: Documents are fit for its purpose (have appropriate language and layout, and accurate spelling, grammar and punctuation).
	Word processing Promotional materials Task 1	Electronic copy of draft newsletter. Statement from the peer verifying whether newsletter meets requirements. Two examples from the peer of how newsletter meets requirements.	Newsletter content is consistent with requirements of Zirconi Bags. Newsletter is consistent with Zirconi Bags' style guide. Newsletter meets requirements for font variation, paragraph, header and footer, page and section breaks, alignment, and lines and borders.

		<p>Suggestions for improvement by the peer.</p> <p>Electronic copy of final newsletter.</p> <p>Completed Verification table for display and formatting features.</p>	<p>Newsletter is error free and of a mailable standard.</p>
<p>Word processing programme Reports</p> <p>Task 3</p>	<p>Electronic copy of report.</p> <p>Completed Verification table for display and formatting features.</p>	<p>Report content is consistent with requirements of Zirconi Bags.</p> <p>Report is consistent with Zirconi Bags' style guide.</p> <p>Report meets requirements for font variation, paragraph, header and footer, and alignment.</p> <p>Report is error free and is suitable for distribution.</p> <p>Report is about 150 to 200 words in length.</p>	
<p>Presentation programme Meeting documentation</p> <p>Task 4</p>	<p>Electronic copy of presentation slides.</p> <p>Completed Verification table for display and formatting features.</p>	<p>Presentation content is consistent with requirements of Zirconi Bags.</p> <p>Presentation is consistent with Zirconi Bags' style guide.</p> <p>Presentation meets requirements for font variation, bullets and numbering, header and footer, and alignment.</p> <p>Presentation is 6 to 10 slides in length.</p> <p>Learners may use other presentation features as appropriate (such as transitions, images, animations, audio, notes page).</p> <p>Slides are error free and suitable for presentation.</p>	
			<p>Sufficiency for ER 1.1:</p> <p>Evidence of competency for wordprocessing, spreadsheeting and presentation programme required.</p> <p>Evidence of correct use of display and formatting features across the documents: Features may</p>

			include font variation, paragraph, header and footer, page and section breaks, tables, columns, bullets and numbering, alignment, lines and borders. They may also include presentation features such as transitions, images, animations or audio.
ER1.2 Variable and fixed data are merged to produce business documents.			Overarching judgement for ER1.2: Evidence of merge fields in electronic files must be used to verify merge features have been used. If learners are unable to provide electronic files, merging of documents can be verified from hard copy of primary file with field codes.
	Spreadsheets and word processing Task 2 Questions 2, 3	Mailing list of customer names and postal addresses. Electronic copy of final newsletter with merge fields for names and postal addresses. Assessor verification of use of merge feature to merge customer mailing list and newsletter.	Variable data (customer details) is merged with fixed data (newsletter) to produce a newsletter addressed to a customer. Assessor must have verified merge feature used.
	Spreadsheets and word processing Task 3	Electronic copy of report with merged fields for 'Total Weekly NZ Shop Take WE280816' data. Assessor verification of use of merge feature to merge Shop Take data and report.	Variable data (sales data) is merged with fixed data (report) to produce a report on sales in New Zealand stores in the week ending 28 August 2016. Assessor must have verified merge feature used.
	Spreadsheets and presentation programme Task 4	File containing data that was embedded in the presentation provided. Electronic copy of presentation with merged fields for spreadsheet data on small suitcases.	Variable data (sales data) is merged with fixed data (presentation) to produce a slide presentation on sales of small suitcases. Assessor must have verified merge feature used.
			Sufficiency for ER 1.2:

		Assessor verification of use of merge feature to merge data on sales of small suitcases with slide presentation.	Must have Task 4 correct AND either of Task 2 or Task 3 correct.
<p>ER 1.3 Self-management contributes to the provision of administration support and the achievement of the entity's operational requirements.</p> <p>Range self-management includes being proactive and may include – time-management, goal setting, prioritisation, consultation, reliability, task follow-up, self-assessment/reflection on performance, managing progress; evidence of five is required.</p>	<p>Proactivity Task 5 Questions 2, 4</p>	<p>Learner examples of how they were proactive.</p> <p>Verification of learner examples.</p> <p>Assessor comments on learner self-management attributes.</p>	<p>Learner examples show proactivity.</p> <p>Learner examples verified.</p> <p>Assessor comments on learner self-management attributes may provide supporting evidence.</p>
	<p>Time-management Goal setting Prioritisation Managing progress Task 5 Questions 1, 4</p>	<p>Diary entries of records in technological/digital format (e.g. an Excel file, phone app or screenshots from a project management tool or email programme).</p> <p>Verification that learner evidence showed the learner had these attributes.</p> <p>Assessor comments on learner self-management attributes.</p>	<p>Records show the learner:</p> <ul style="list-style-type: none"> • Managed their time appropriately during tasks. • Set goals to complete tasks as required. • Prioritised the steps that were required to complete tasks. • Managed their progress through the tasks. <p>Verification of attributes completed.</p> <p>Assessor comments on learner self-management attributes may provide supporting evidence.</p>
	<p>Self-assessment / reflection Task 5 Question 3</p>	<p>Learner assessment of their own performance in the tasks (e.g. what they did well, any challenges they encountered, what skills they improved in, what they would change when completing a similar task in future).</p> <p>Assessor verification of their self-assessment / reflection.</p> <p>Assessor comments on learner self-management attributes.</p>	<p>Learner examples show reflection / assessment of own performance has taken place.</p> <p>Assessor has verified learner's reflection/ self-assessment.</p> <p>Assessor comments on learner self-management attributes may provide supporting evidence.</p>

	Reliability Task Follow-up Task 5 Question 4	Assessor verification of learner reliability. Assessor verification of learner's task follow-up. Assessor comments on learner self-management attributes.	Assessor has verified learner's reliability. Assessor has verified learner follows up on tasks. Assessor comments on learner self-management attributes may provide supporting evidence.
	Consultation Task 1 Questions 2, 3, 4 Task 5 Question 4	Copy of draft newsletter and final newsletter (Task 1 Question 4). Completed Peer feedback. (Task 1 Question 2). Verification that the learner consulted with a peer during the assessment. Assessor comments on learner self-management attributes.	Feedback given by the peer confirms learner consulted with them. Draft and Final newsletters shows peer feedback addressed as required. Verification of learner consultation with a peer. Assessor comments on learner self-management attributes may provide supporting evidence. Sufficiency for ER 1.3: must have evidence of proactivity AND 4 attributes from: time-management, goal setting, prioritisation, consultation, reliability, task follow-up, self-assessment/reflection on performance, managing progress.

Final grades will be decided using professional judgement based on a holistic examination of the evidence provided against the criteria in the unit standard.