



## NZQA Assessment Support Material

<b>Unit standard</b>	<b>29031</b>				
<b>Title</b>	Produce business documents using advanced features and functions of software applications.				
<b>Level</b>	4	<b>Credits</b>	20	<b>Version</b>	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 six assessment tasks in which you need to demonstrate your ability to produce business documents using advanced features and functions of appropriate software applications.

This assessment is in the context of a fictional business entity called Zirconi bags. Your assessor will supply you with documentation related to this entity. The evidence you provide for the assessment must meet the requirements of this entity.

## AWARD OF CREDIT



To be awarded credit for this unit standard candidates must demonstrate your ability to produce business documents using advanced features and functions of software applications.

## CONDITIONS OF ASSESSMENT



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

For the purpose of this assessment we have referred to Microsoft software applications, however this is not limited to Microsoft software and may include other suitable software applications for example Google Docs, Free Office 2016, etc.



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

### Assessment activity

This assessment contains the following tasks:

1. Produce a fillable form
2. Produce a presentation
3. Produce a promotional document
4. Produce a mail merge document
5. Give examples of problem solving and decision making
6. 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 candidate:
  - Catering\_approved\_suppliers.docx
  - Company\_style\_guide.docx
  - Database\_CustomerClubMembers\_Oct2016.docx
  - Letter\_layout.docx
  - Meeting\_request\_form.docx
  - Organisational\_chart.pdf
  - Store\_locations.docx
  - WeeklyShopTake\_WE23102016.xlsx
  - Zirconi\_retail\_structure.docx
  - Zirconi\_background\_information.docx
  - Zirconi\_logo1.jpg, Zirconi\_logo2.jpg, Zirconi\_logo3.jpg, Zirconi\_logo4.jpg
- Candidates will need access to a computer with appropriate software applications, email, and a printer.

## Assessment Schedule

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Outcome 1 Produce business documents using advanced features and functions of software applications.

Range business documents may include – formal reports, meeting documents, promotional documents, electronic forms, presentations, industry/sector specific technical documents.

ER	Task	Evidence	Judgement
ER 1.1 Software application(s) selected are appropriate for the business documents being produced.	Electronic form; meeting document Task 1	Electronic copy of Catering Request form.	<p>Candidate selected appropriate software application to produce the form, e.g. Microsoft Word.</p> <p>Software application selected enabled document to be produced as required by the Financial Controller.</p> <ul style="list-style-type: none"> <li>• Similar to the Meeting Request form layout.</li> <li>• Consistent with the hand-drawn diagram.</li> <li>• Appropriate for staff members to use when ordering catering.</li> <li>• Be organised using a complex table, in a similar layout to the existing Meeting Request form.</li> <li>• Be formatted using Zirconi bags company style guide.</li> </ul>

		<ul style="list-style-type: none"> <li>• Ensure the Zirconi bags logo is used accordingly.</li> <li>• Have fillable fields (text boxes) in which staff can type text.</li> <li>• Contain hyperlinks to the catering suppliers' websites.</li> <li>• Be protected, so the staff filling it in can only type in the required fields.</li> </ul>
	Presentation Task 2	<p>Electronic copy of Sales Presentation slides.</p> <p>Candidate selected appropriate software application to produce the presentation, e.g. Microsoft PowerPoint.</p> <p>Software application selected enabled document to be produced as required by the Retail Manager.</p> <ul style="list-style-type: none"> <li>• Suitable for presentation at the manager's meeting.</li> <li>• Highlight sales information.</li> <li>• Be formatted using Zirconi bags company style guide.</li> <li>• Contain summarised sales data (sourced from the WeeklyShopTake_WE23102016 file) that is presented in complex tables.</li> <li>• Include references to the data and any images used.</li> <li>• Contain a hyperlink to Retail New Zealand so that the managers can discuss the upcoming Top Shop awards.</li> <li>• Be 4 - 6 slides long.</li> <li>• Include 3 - 4 images (that are not the company logo).</li> </ul>

		<ul style="list-style-type: none"> <li>• Ensure the Zirconi bags logo is used accordingly.</li> <li>• The company's logo must be included on all slides.</li> </ul>
Promotional Document Task 3	Electronic copy of a promotional document.	<p>Candidate selected appropriate software application to produce the Promotional Document, e.g. Microsoft Word or Microsoft Publisher.</p> <p>Software application selected enabled document to be produced as required.</p> <ul style="list-style-type: none"> <li>• Be formatted using Zirconi bags company style guide.</li> <li>• Contain a page layout that includes columns.</li> <li>• Include 3 to 4 images that are formatted using the positioning and word wrapping options.</li> <li>• Ensure the Zirconi bags logo is used accordingly.</li> </ul> <p>Include a relevant quote from the Internet that shows Zirconi bags' dedication to customer service, and reference the source of that quote.</p>
Document Task 4	Electronic copy of a document with mail merge.	<p>Candidate selected appropriate software application to produce the document, e.g. Microsoft Word.</p> <p>Software application selected enabled document to be produced as required.</p> <ul style="list-style-type: none"> <li>• Contain information on the VIP evening.</li> <li>• Use the Zirconi bags letter template and follow the company style guide.</li> <li>• Ensure the Zirconi bags logo is used accordingly.</li> </ul>

			Use mail merge to send the document to all of the customers in the Christchurch area who joined the Customer Club in the last month
<p>ER1.2 Advanced features and functions are applied to produce business documents that are fit for purpose.</p> <p>Range advanced features and functions may include – styles, referencing, complex tables, macros, hyperlinks, conditional merge, use of fields; evidence of six is required.</p>			<p><b>Overarching judgements statement for 1.2:</b></p> <ul style="list-style-type: none"> <li>• <b>All documents must be fit for purpose (have appropriate language and layout, and accurate spelling, grammar and punctuation).</b></li> <li>• <b>Document content is consistent with requirements of Zirconi bags.</b></li> <li>• <b>Document content is consistent with requirements of the person requesting the document.</b></li> </ul>
	Styles Task 1	Electronic copy of Catering Request form.	<p>Form produced is consistent with Zirconi Style Guide.</p> <p>Form to be similar in layout to Meeting Request form.</p>
	Complex tables Task 1	Electronic copy of Catering Request form.	<p>Form meets requirements of Financial Controller, outlined on hand-written drawing.</p> <p>Form produced using following features; setting of column width and row height, merging and splitting of cells, setting and alignment of tabs, application of shading.</p>
	Hyperlinks Task 1	Electronic copy of Catering Request form.	Links to Subway and Habitual Fix websites are embedded in form and correctly linked to the websites.
	Use of fields Task 1	Electronic copy of Catering Request form.	<p>Form produced using 'Fillable forms' feature.</p> <p>All response cells have fields.</p> <p>Form is protected with password so data can only be entered into a field.</p>

Styles Task 2	Electronic copy presentation slides.	Presentation slides content is formatted using a master slide (styles) and is consistent with Zirconi Style Guide.
Complex tables Task 2	Electronic copy presentation slides.	Presentation slides include at least one complex table.
Referencing Task 2	Electronic copy presentation slides.	References to data and images used are included in the presentation. Reference added via footnote and reference number in subscript.
Hyperlinks Task 2	Electronic copy presentation slides with link to Retail New Zealand.	Link to Retail New Zealand is embedded in form and correctly linked to the website.
Styles Task 3	Electronic copy of promotional document.	Promotional document produced is consistent with Zirconi Style Guide.
Page layout Task 3	Electronic copy of promotional document.	Promotional document is structured using a columnar page layout.
Images Task 3	Electronic copy of promotional document.	Promotional document includes at least two images that are formatted using suitable positioning and word wrapping options.
Referencing Task 3	Electronic copy of promotional document.	Promotional document contains a quote that is referenced. Reference added in a footnote.
Styles Task 3	Electronic copy of document.	Document produced is consistent with Zirconi Style Guide.
Conditional merge Task 4	Mailing list of customer names and postal addresses. Electronic copy of document with merge fields for names and postal addresses. Electronic copy of document addressed to one customer	Document is merged with list of customers in the Christchurch area who joined the Customer Club in the last month. Document addressed to one customer in the list is produced as evidence.

			Merge fields in electronic copy of document confirm mailing list of customer names and postal addresses has been merged into the document.
			<b>Sufficiency for ER 1.2: evidence of six advanced features and functions is required.</b>
ER1.3 Problem-solving and decision-making techniques are applied in the production of business documents to meet stakeholder needs and requirements of the entity.	Task 1	Electronic copy of Catering Request form.	Appropriate software application is selected, for example, Microsoft Word.  Form meets requirements of Financial Controller, outlined on hand-written drawing.  Form is consistent with Zirconi Style Guide.  Form is in a similar format to the 'Meeting Request form'.
	Task 2	Electronic copy of Sales presentation.	Appropriate software application is selected, for example,  Microsoft PowerPoint.  Presentation document meets requirements of Retail Manager.  Presentation document is consistent with Zirconi Style Guide.
	Task 3	Electronic copy of promotional document.	Appropriate software application is selected, for example, Microsoft Word or Publisher.  Promotional document meets requirements of Marketing Manager.  Promotional document is consistent with Zirconi Style Guide.
	Task 4	Electronic copy of document.	Appropriate software application is selected, for example, Microsoft Word.  Document meets requirements of Marketing Manager.  Document is consistent with Zirconi Style Guide.



	Task 5	Two examples of how candidate applied problem-solving and decision-making techniques.	Examples consistent with documents produced.
	Assessor verification	Verification that the candidate applied problem-solving and decision-making techniques in Task 1, 2, 3 and 4.	Confirmation by verifier that candidate solved a problem and made a decision.
			<b>Sufficiency for ER1.3: Require Task 1, 2, 3 and 4 correct, and task 5 and assessor verification completed.</b>
<p>ER 1.4 Self-management contributes to the provision of administration support and the achievement of the entity's operational requirements. 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>	Proactive Assessor verification	Verification that the candidate was proactive with comment.	Comment given by verifier confirm proactivity.
	Proactive Task 6 Q2	Example of how candidate was proactive.	Example given confirms candidate was proactive.
	Time-management Assessor verification	Verification that the candidate used their time appropriately with comment.	Comment given by verifier confirms time-management skills.
	Time-management Task 6 Q1	Copy of diary.	Diary entries confirm time-management skills.
	Prioritisation Tasks 1, 2, 3, 4	Verification that the candidate prioritised the tasks required during the assessment.	Example given by verifier confirms use of prioritisation.
	Consultation Assessor verification	Verification that the candidate consulted with others during the assessment.	Example given by verifier confirms candidate consulted with others.
	Consultation Task 3 Q2	Copy of draft promotional document	Feedback given by peer confirms candidate consulted with others.

		Completed Peer feedback Copy of final promotional document	Final promotional document shows peer feedback addressed as required.
	Task follow-up Assessor verification	Verification that the candidate followed up on tasks assigned to them.	Example given by verifier confirms candidate followed up on tasks.
	Task 6 Q3	Example of how candidate showed two attributes of self-management. (other than proactivity)	Examples given by candidate confirm competency.
			<b>Sufficiency for ER 1.4: must have evidence of proactivity AND 4 of the listed attributes.</b>

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