

CfE

HIGHER ADMINISTRATION and IT



BrightRED Study Guide

CfE HIGHER

ADMINISTRATION and IT



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the BrightRED Digital Zone

NEW
EDITION

INTRODUCTION

INTRODUCING HIGHER ADMINISTRATION AND IT

THE IMPORTANCE OF ADMINISTRATION

A successful business needs knowledgeable and highly-skilled administrators who can provide high-level administrative support to ensure the smooth and efficient running of the organisation.

An Administrative Assistant has to manage the day-to-day operations of an office. This could range from undertaking basic routine tasks to taking responsibility at a more senior level and overseeing the work of junior staff; this is all dependent on the size and structure of the organisation. Administrative support could therefore involve keyboarding, reading and replying to e-mails, composing letters and memoranda, supervising staff (including planning their work assignments), customer care, dealing with confidential matters (staff-related or otherwise), writing reports, organising meetings, implementing and developing organisational policies and procedures, project management and Health and Safety.

Breakthrough developments in information technology (IT) and the increased use of emerging technologies have had a major impact on the way many administrative tasks are undertaken and indeed in the way organisations function and communicate. As office automation and the use of IT to execute various office procedures continues to develop, there will be an increased need for skilled Administrative Assistants.

This Higher Study Guide will help develop your knowledge and understanding of the role Administrative Assistants play in modern business organisations. Practical activities will also help you develop the IT skills necessary to organise, analyse, store, and present and communicate business information using appropriate software applications. This guide will also help you to develop and apply skills for learning, skills for work and skills for life.

HIGHER COURSE CONTENT

The Higher course contains three units of study:

Administrative theory and practice

This unit enables you to develop an in-depth knowledge and understanding of administration in, and the impact of IT on, the workplace. You will acquire an in-depth knowledge and understanding of the factors contributing to the effectiveness of the administrative function, such as efficient time and task management, complying with workplace legislation, successful teams, organising effective meetings and good customer care.

IT solutions for administrators

The purpose of this unit is to develop learners' skills in IT and in the organisation and management of information in administration-related contexts. Learners will develop the ability to utilise a range of functions within IT applications covering word processing, spreadsheets and databases, and to use them to analyse, process and manage information in order to create and edit relatively complex business documents. This unit, in particular, will be supported with a range of tasks on the Digital Zone to allow learners to confidently develop and apply their ICT skills at an advanced level.

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Communication in administration

The purpose of this unit is to enable learners to develop a range of IT skills (focusing particularly on presentation software) for researching and communicating complex information to others. This will enable learners to communicate information, taking account of the needs of the audience. Learners will develop an understanding of barriers to communication and ways of overcoming them to ensure communication is understood. This unit will also develop learners' knowledge and understanding of how to maintain the security and confidentiality of information.

COURSE ASSESSMENT - EXTERNAL ASSESSMENT

Theory question paper

The question paper is worth 50 marks (42 per cent of the total mark). The question paper consists of two sections:

- **Section 1** – This section has 10 marks and consists of a set of mandatory questions based on a given stimulus. The questions can come from any areas covered in the course.
- **Section 2** – This section has 40 marks and consists of mandatory questions. Questions from each section of the course will be sampled, ensuring there is a balanced coverage across the course.

The question paper is set and marked by SQA. Learners will complete this in one hour and thirty minutes. A specimen examination paper is available to learners in the Digital Zone.

Practical assignment

The purpose of this is to address challenge and application. It assesses your ability to apply problem-solving and advanced IT skills in the context of a complex scenario.

This assignment is set by SQA on an annual basis and conducted under a high degree of supervision and control within presenting centres. You will complete the assignment in two hours. The assignment is worth 70 marks (58 per cent of the total mark).

EXAMINATION HINTS - QUESTION PAPER

Before you start answering questions in the external examination paper, you should identify the key 'command word' used in each question. This will ensure that you tailor your response to the demands of the question being asked. The table below outlines the key command words which could be used in the final external examination.

COMMAND WORD	MEANING
State	Listing or bullet points would be acceptable here.
Suggest	More than just naming or stating. Put forward a recommendation or advise on a possible course of action.
Outline	Identify key features and provide a brief description where appropriate.
Describe	Give a description and use examples where possible as part of the description.
Explain	Give a definition and then an example as to how something may or may not be affected.
Discuss	Give advantages and disadvantages where possible. Use examples to expand your answer, and if possible give a conclusion to your answer.
Compare	You must be able to compare the similarities or differences between the items, again giving a conclusion if necessary. A key word that you can use in this type of question is 'whereas'.
Justify	You must be able to give reasons why a certain course of action is being taken.
Implications	You should be able to state what the likely outcome of a particular action will be in the longer term, either on a person or on an organisation.
Consequences	You must be able to identify the initial impact of the action being followed.

PRESENTATION SOFTWARE

EDITING A PRESENTATION

PowerPoint is software that uses slides to create and build dynamic **slide presentations** that can include text, bulleted lists, images, charts, animation, narration, images and video. You can add as many slides as you want to a presentation and you can view or play back your presentation at any time. You can also print the presentation in handout format, providing hard copy for the audience to annotate and take away for future reference.

VIEWS FOR EDITING YOUR PRESENTATION

Normal view

This is the main view and it is sub-divided into four working areas:

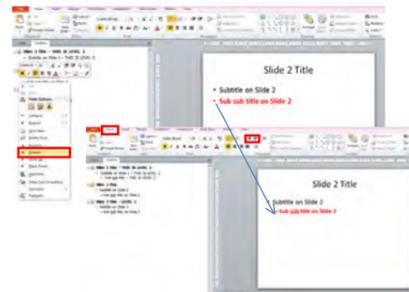
- **Slides tab** – lets you see each slide as a thumbnail image. You can then scroll through to see any changes you have made to the overall design. Change the order of slides by dragging them up or down; add new slides by clicking **New Slide** and selecting the desired layout; delete slides using the **Delete** key.
- **Outline tab** – lets you edit your presentation in a ‘text only’ environment, providing a more efficient way to draft text. Moving text between slides is easy, as is changing the order of the slides. You can also print the **Outline View** of your presentation. The **Outline** pane can be resized to see more information – simply position the mouse pointer over the right-hand edge until it changes to \leftrightarrow , click and drag the pointer until it reaches the desired size. As you type, the text appears on the slide and in the **Outline View**. Using your keyboard, new lines can be created, bullets can be **promoted/demoted** and new slides can be inserted.

Promoting and **Demoting** changes the importance of the lines of text that you are editing:

- If you have a main point you’d like to become a sub-point, demote it!
- If you have a sub-point you’d like to become a new slide, promote it!

Example:

You want the **Sub sub title** to move down a level so that it is on a different level from the subtitle (that is, you want to decrease its importance). Select that line of text then right-click and select **Demote**. Alternatively press the **Tab** key. The **Sub sub title** has now moved to the right and the format of the bullet has changed from • to -.



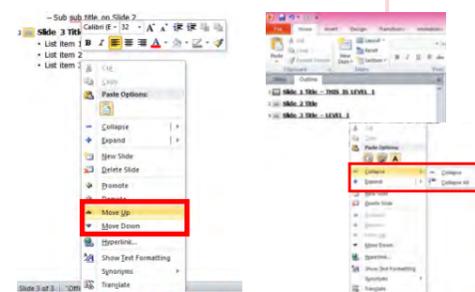
To increase the importance of text, right-click and select **Promote** or press **Shift + Tab**. The text moves left and the bullet point changes/disappears.

To create a new line at the same level, press the **Return** key.

Another way to do this is by using the **Decrease List Level** and **Increase List Level** buttons (¶) on the **Home** tab.

To rearrange the order of the bullets in a list right-click and select either **Move Up** or **Move Down**.

To see only the structure of the slides and not the detail, or to move slides around the **Outline** pane, right-click and select **Collapse** for one slide or **Collapse All** for every slide. To show the detail again, click on **Expand/Expand All**.



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VIDEO LINK

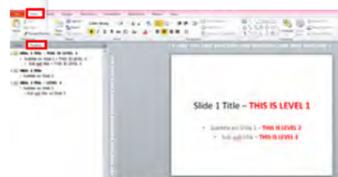


Check out the clip at www.brightredbooks.net for a tutorial on using PowerPoint.

ONLINE TEST



To test your knowledge of presentation software, head to www.brightredbooks.net



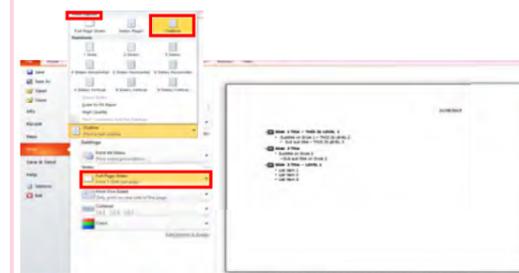
DON'T FORGET



Promoting text to its highest level will create a new slide containing that text!

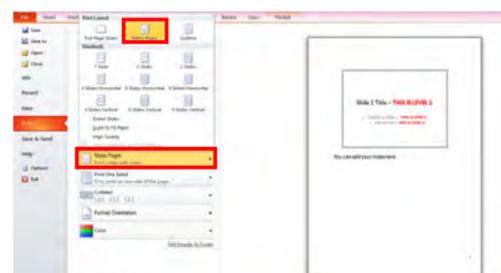
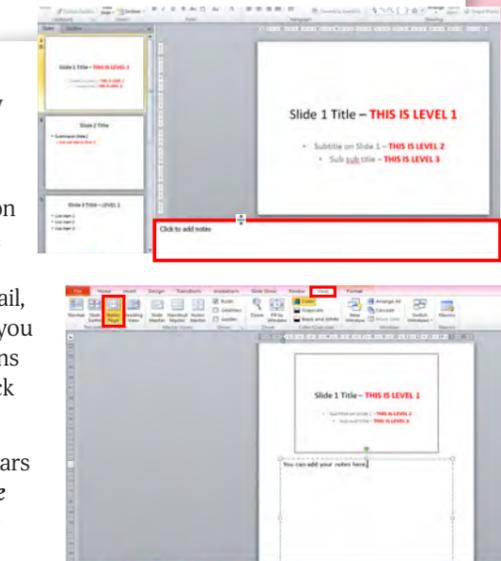
- **Slide pane** (upper-right of window) – displays a large view of the slide you are working on. From here, you can add text or any of a wide variety of graphics, video clips and animations, sounds and so on.
- **Notes pane** (below **Slide** pane) – click this pane to add notes relating to the current slide that might be useful to refer to during your presentation or reading a hard copy of it later. Notes can also be printed or posted on a Web page. The **Notes** pane can be adjusted to see all the text or it can be opened from the **View** menu. Each **Notes Page** shows a slide thumbnail, together with the notes that accompany that slide. In **Notes Page View**, you can embellish your notes with charts, pictures, tables or other illustrations and you can see how your notes pages will print. Here you can also check and change the headers and footers of your notes.

If you want to print an outline of your presentation, with the text (as it appears in **Outline View**) but no graphics or animation, you should first click the **File** tab and then click **Print**. Click **Full Page Slides** under **Settings**, then choose **Outline** from the list under **Print Layout**. Finally, click **Print** at the top.



To print **Notes** – go to the **File** tab, click on **Print** then select **Notes Pages** from the drop-down menu.

The notes pages will be printed with a slide thumbnail.



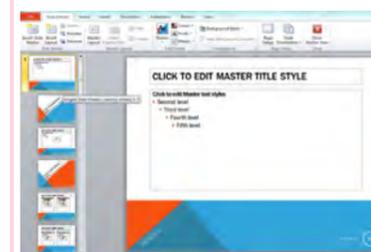
To print notes pages without slide thumbnails, open each slide in **Notes Page View**, click the slide thumbnail and then press the **Delete** key before following the printing steps above.

Slide master



Slide Master View (on the **View** tab) lets you modify slides and make changes to layouts which will affect every slide in the presentation – for example insert the company logo on all slides. This saves a lot of time. **Themes** have built-in slide layouts and background graphics and you can edit these in **Slide Master View**. You can also modify individual slide layouts to change any slides using these particular layouts.

The first slide in the **Navigation** pane is the **Slide Master** and any changes made to this slide will affect the entire presentation.



Hovering the mouse over the remaining layouts will show which slides use which particular layouts. Changes to a slide layout will only be applied to those slides using that layout in your presentation.

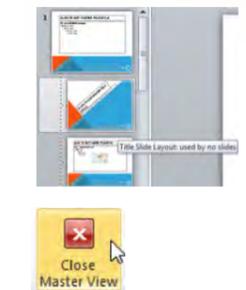
After changing the **Slide Master**, review to see how the changes affect each slide. You may find some of your slides don't look right and more changes are needed. Click **Close Master View** to return to your presentation.

DON'T FORGET

You can print only one slide thumbnail with notes per printed page.

DON'T FORGET

When editing an existing presentation in Slide Master view it is sometimes easier to see which layouts have been used if you first delete those layouts 'used by no slides'.



THINGS TO DO AND THINK ABOUT

It is often best to set up **Slide Master** first before creating individual slides – this can save time as you don't have to type the same information on more than one slide.

ADMINISTRATIVE THEORY AND PRACTICE

SETTING TARGETS FOR THE INDIVIDUAL AND THE ORGANISATION 1

It is very important within any organisation that staff share the management's vision. One of the duties of the Senior Administrative Assistant is to set both personal and departmental **targets** to enable the organisation to meet its long-term aims and objectives. Departmental targets will only be achieved by employees working as a team and working towards achieving their own personal objectives.



WHY SET TARGETS?

There are a number of reasons why targets should be set for both individual employees and the organisation as a whole. Setting targets helps

- measure the success of an organisation
- managers organise their resources (both financial and human)
- all employees to understand what the organisation wishes to achieve
- all employees to understand their role in the organisation
- employees to measure the success of their work compared with the original targets set

Example: Targets

Here are some examples of targets a company might set:

- Reduce customer complaints by 20 per cent.
- Increase keyboarding speed from 50 words per minute to 75 words per minute.
- Increase sales by 20 per cent per quarter.
- Maintain a clear and tidy workstation.
- Reduce time taken to file documents.
- Reduce unnecessary photocopying to try to reduce administrative costs.

'SMART' TARGETS

It is not enough to simply set targets – targets need to be SMART!

S	Specific – The target must be well defined and state exactly what is required or is to be achieved.
M	Measurable – It must be quantifiable and be expressed in some form of measurement unit, for example, increase sales by 20 per cent.
A	Agreed – The target must be discussed and agreed with your line manager, especially when preparing your personal development plan (PDP).
R	Realistic – Targets should be challenging but must still be achievable.
T	Timed – It is important that key dates identify when the target should be completed.

DON'T FORGET

A number of planning aids can be used to record and monitor targets.

PLANNING AIDS

Target setting (both at individual and organisational level) will be based on a number of factors and should be recorded and monitored using a variety of different documents such as those shown in the table below.

NAME OF DOCUMENT	DESCRIPTION
Gantt chart	This is used by project managers to show comparisons between work planned and work accomplished in relation to time schedules. It looks a bit like a bar chart.
To-do list	Usually a note to yourself to show a list of tasks that need to be completed. These may be pre-printed to-do lists or simple sticky notes or sheets of scrap paper.
Priorities list	Similar to a to-do list but this time put in order of priority showing which task needs to be tackled first, which second and so on.
Action plan	A document that identifies what should be done by whom, with expected completion dates.
Electronic diary (e-diary)	Useful for arranging meetings as days, weeks and months can be seen at a glance, and the e-diaries of all participants can be seen at the same time. Most e-diaries have electronic task lists which aid planning and organisation.
Personal development plan	A formal document that allows an employee to record areas of strength and areas where training and development are required. This helps the employee to meet targets set. Some organisations also encourage employees to record personal aims. Although not a requirement of the job, these may enhance the employee's confidence and well-being.

Let's now look at an example of each.

Gantt chart

This is a chart that allows individuals to see at a glance key dates and tasks and to monitor when tasks have been completed. The Gantt chart below plots the time plan horizontally and the tasks to be completed vertically.

Example:

This Gantt chart shows the planning and organising of a jobs fair over a 13-week period.

ACTIVITY/WEEK	1	2	3	4	5	6	7	8	9	10	11	12	13
Create database of local businesses, colleges and training agencies	■	■											
Research and book a suitable venue for the jobs fair conference		■	■										
Prepare an itinerary for the one-day event				■									
Send letters of invitation to potential delegates					■	■							
Prepare publicity materials and distribute							■	■					
Update database with delegate responses and their requirements			■	■	■	■	■	■					
Plan layout of room and produce guides for job-seekers									■	■			
Source potential caterers and budget for catering costs											■	■	
Prepare evaluation forms for both delegates and job-seekers												■	■
Update database from information on evaluation forms													■

Priorities lists

A priorities list is very similar to a to-do list. In this type of list, however, tasks to be completed are prioritised so that more urgent tasks are undertaken first. Employees usually also estimate how much time each task will take to complete and this helps ensure that as many tasks as possible on the list can be carried out.

PRIORITY	TASK	TIME	CHANGES OR PROBLEMS	COMPLETED/CARRIED FORWARD
1	Check and distribute incoming mail including e-mails	30 mins		✓
4	Type up notice of meeting and agenda for next month's managers' meeting	20 mins		✓
5	E-mail notice of meeting and agenda to all department managers and directors	10 mins	Check agenda items for other paperwork	Started – network problems. Carried forward
2	Meet with departmental manager to discuss today's tasks	30 mins	Manager unexpectedly absent	Not started
3	Type up minutes of last department managers' meeting	30 mins		✓

THINGS TO DO AND THINK ABOUT

You are an Administrative Assistant at Campbell and Clark Ltd.

Simon Gregg, the Human Resources Manager, wishes to highlight to all staff the impact that time stealers can have on their workflow and suggest possible measures that staff can take to avoid them.

He has asked that you prepare a short PowerPoint presentation outlining six time stealers and strategies that staff can use to address them. Make your presentation as informative as possible and forward to Mr Gregg for approval.

DON'T FORGET

Gantt charts track progress on a project over time.

Approximately 100 delegates to attend. All activities are expected to begin at their earliest start time.

- Work to be completed
- Completed work

ONLINE

For more activities on setting targets, head to www.brightredbooks.net

ONLINE TEST

Head to www.brightredbooks.net and test your knowledge of setting targets.

ADMINISTRATIVE THEORY AND PRACTICE

MEETINGS



INTRODUCTION

A meeting is a gathering together of people for a purpose and meetings take place in all organisations. The main purposes are to:

- discuss and generate ideas
- consult on issues and solve problems
- motivate staff and for team building
- delegate tasks and responsibilities
- set targets and objectives
- plan and make decisions.

If a meeting is necessary, then it must be well organised and run to be effective.

Principles for Effective Meetings

1. Plan the meeting first – is it absolutely necessary?
2. Make sure it has a clear purpose.
3. Prepare an agenda and circulate before the meeting.
4. Set a time limit for the meeting to last, for example, 1 hour.
5. Delegate responsibilities, keep control and agree outcomes and actions.
6. Follow up on agreed actions.

DON'T FORGET

Meetings must be well organised.

DON'T FORGET

Meetings can be formal or informal.

DON'T FORGET

The key office bearers are: Chairperson, Secretary and Treasurer.

FORMAL MEETINGS

To ensure that a formal meeting is valid (legal) it is important for it to be:

1. **Properly convened** – appropriate notice given to every person entitled to attend
 2. **Properly constituted** – the Chairperson and quorum (minimum number of people allowed to attend) must be present
 3. Held in accordance with **rules and regulations** governing the conduct of meetings.
- Formal meetings are likely to have three **office bearers** who will be assigned key roles and responsibilities. These are outlined below:

Office Bearer	Outline of Role/Responsibilities
Chairperson	<ul style="list-style-type: none"> • Keeping order at a meeting and generally taking charge of the meeting • Making sure that the meeting is set up and run according to the organisation's Standing Orders • Compiling the agenda • Ensuring that the previous minutes of meeting are correct • Ensuring there is a minimum number of people present to start the meeting (a quorum) • Starting and closing (adjourning) the meeting on time • Ensuring discussion is kept to the point and working consistently through the agenda • Ensuring everyone has the opportunity to speak • Deciding when it is time to vote, and declaring the result of a vote
Secretary (Administrative Assistant)	<p>Providing administrative support before, during and after the meeting.</p> <p>Before the meeting the Administrative Assistant must:</p> <ul style="list-style-type: none"> • Book the venue/accommodation for the meeting and ensure good room layout • Order refreshments, taking account of special dietary requirements • Book any equipment that may be needed • Inform reception where the meeting is and arrange for parking spaces/permits • Distribute the approved notice of meeting and agenda to members entitled to attend • Prepare an attendance register and name cards for the attendees – if necessary • Ensure minutes of previous meeting are sent out in advance and are also available at the meeting

contd

Secretary (Administrative Assistant) – cont'd	<ul style="list-style-type: none"> • Arrange with the switchboard to re-route calls or take messages during the meeting • Place a "Meeting in Progress" sign on the door of the meeting room <p>During the meeting the Administrative Assistant is responsible for:</p> <ul style="list-style-type: none"> • Assisting the Chairperson by distributing files or documents • Making sure all present sign the register and read the minutes of the previous meeting • Taking notes summarising proceedings so that the minutes can be drafted • Distributing any expense claim forms <p>After the meeting the Administrative Assistant is responsible for:</p> <ul style="list-style-type: none"> • Removing the "Meeting in Progress" sign and tidying the room • Preparing draft minutes from the notes taken as soon as possible after the meeting • Making a note of the date of the next meeting in own diary and Chairperson's diary • Writing any letters as required from the meeting • Contacting attendees who have actions from the meeting to check that they are comfortable with what they have to do • Preparing and send out evaluation forms if necessary to all those present at the meeting
Treasurer	The Treasurer is responsible for preparing financial statements and reports and presenting this information at the meeting. In business, the Finance Director or Senior Accountant would undertake this role.

CONSEQUENCES OF POORLY PLANNED MEETINGS

When a meeting has not been well organised it reflects on the organisation and the person responsible for organising the meeting – the Administrative Assistant.

- The meeting may be postponed, particularly if attendees have not received the meeting papers or the agenda with sufficient notice.
- A badly designed agenda may lead to time wasting and the meeting taking longer than necessary.
- If attendees have not received the minutes or papers for the meeting in sufficient time they might not have time to read them, so might not be able to join the discussion.
- If the venue has not been booked or is double booked the meeting may not take place.
- An attendee may be embarrassed, or even angry, if the food provided is not suitable.
- If parking has not been arranged, or if there is no disabled access, it may result in attendees being late (and annoyed).
- If the correct meeting procedures have not been followed, then any decisions taken at the meeting could be invalid.
- People attending the meeting could feel that their time has been wasted – and time in business is money!



DON'T FORGET

The Administrative Assistant has duties to perform before, during and after a meeting.

DON'T FORGET

A poorly organised meeting reflects badly on the organisation and the Administrative Assistant.

ONLINE TEST

Test yourself on meetings at www.brightredbooks.net

THINGS TO DO AND THINK ABOUT

1. Justify the need for an effective chairperson at a meeting. (2 marks)
2. Outline the use of two documents relating to a formal meeting and justify their importance. (2 marks)
3. Explain the consequences of failing to plan and organise effectively for a meeting. (4 marks)
4. Describe the role of an Administrative Assistant before a meeting takes place. (4 marks)
5. Justify the use of remote meetings. (2 marks)



ADMINISTRATION and IT

William Reynolds and Jane Sturrock

This BrightRED Study Guide is the ultimate companion to your CfE Higher Administration and IT studies! Written by our trusted authors and experienced teachers, William Reynolds and Jane Sturrock, this book is full-colour and packed with clear and accessible information, excellent examples, activities and advice. Inside, you will find:

- ▶ **All the essential course information, fully up-to-date with SQA course changes**, arranged in easily digestible double-page topic spreads.
- ▶ **Detailed full-colour** illustrations and data boxes to make sure all that study sticks!
- ▶ **Don't forget** pointers offering advice on the key facts to remember, and on how to avoid common mistakes.
- ▶ **Things to do and think about** sections encouraging the regular review of key points covered.
- ▶ **Digital Zone activities and tests** to supercharge your learning efforts online!
- ▶ **An index** of key terms to help when revising.

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