

Title:	Producing Business Documents Using Digital Tools
Level:	Level 1
Credit value:	3
GLH:	27
Unique Reference Number:	D/652/0546
Sector Subject Area:	14.1 Foundations for Learning and Life
Aim:	The aim of this unit is to develop the learner's knowledge and skills in producing business documents using digital tools. Learners will develop practical skills in creating, editing and formatting documents commonly used in business environments. They will learn how to organise and present information clearly and check documents to ensure they are accurate and suitable for business use.
Assessment Type:	Assessment of this unit will be through an internally set and internally assessed portfolio of evidence.
Assessment Guidance:	<p>Assessment decisions for skills-based learning outcomes must be made during the learner's normal work activity. Direct observation should form a primary source of evidence and be supported, where appropriate, by discussion, annotated screenshots or photographs, saved documents, or witness statements.</p> <p>Skills-based assessment must be carried out over an appropriate period of time to ensure consistency and independence of performance.</p> <p>Evidence must confirm that the learner can independently create, organise, format and check business documents using appropriate digital tools. Documents produced should demonstrate the ability to enter and edit information, apply basic formatting, insert simple elements such as tables or images, save and store documents using appropriate file names, and produce a final version suitable for business use.</p>

Learning outcomes

The learner will:

1. Understand the purpose of business documents produced using digital tools.

Delivery content:

The aim of this learning outcome is to develop the learner's understanding of why digital documents are used in business and the types of documents commonly produced.

The learner must demonstrate that they can:

- 1.1 Identify **examples of business documents produced using digital tools**.
- 1.2 Identify the **purpose of different business documents**.
- 1.3 Recognise the **importance of presenting business documents clearly and accurately**.

2. Be able to create business documents using digital tools.

Delivery content:

The aim of this learning outcome is to develop the learner's skills in creating business documents using digital tools and applying basic formatting techniques.

The learner must demonstrate that they can:

- 2.1 **Create a simple business document** using appropriate digital tools.
- 2.2 **Enter and edit information** in a digital document.
- 2.3 **Apply basic formatting** to improve the presentation of a document.
- 2.4 **Save and store documents** using appropriate file names.

3. Be able to present information clearly in a business document.

Delivery content:

The aim of this learning outcome is to develop the learner's skills to organise and present information clearly within a business document.

The learner must demonstrate that they can:

- 3.1 **Organise information logically** within a document.
- 3.2 **Insert simple elements such as tables or images** to support information.
- 3.3 **Prepare a document so it is suitable for sharing or printing**.

4. Be able to check the accuracy of a business document.

Delivery content:

The aim of this learning outcome is to develop the learner's skills in checking business documents to ensure information is accurate and appropriately presented before final use.

The learner must demonstrate that they can:

- 4.1 Check a document for **spelling or formatting errors**.
- 4.2 Correct **errors identified in a document**.
- 4.3 Produce a **final version of a business document suitable for business use**.

<p>Scope of Training</p> <p>The Scope of Training identifies areas that must be covered during the delivery of this unit. This is the minimum that is expected but tutors are expected to include other areas, knowledge of which will benefit their learners, based on location, types of work available and from the tutors own professional experience.</p>	
<p>Requirements</p>	
<p>Examples of business documents produced using digital tools:</p>	<p>Definition:</p> <p>Business documents created using digital tools to communicate, record or share information in a business environment.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Learners must understand that business documents produced using digital tools may include: <ul style="list-style-type: none"> ○ Letters. ○ Emails. ○ Reports. ○ Spreadsheets. ○ Presentations. ○ Memos. • Learners must understand that these documents are created using digital tools such as word processing, spreadsheet or presentation software. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Agendas. • Meeting notes. • Forms. • Information sheets. • Notices. • Internal communications.
<p>Purpose of different business documents:</p>	<p>Definition:</p> <p>The reason why different business documents are created and used within a business environment.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Learners must understand that different business documents are used for different purposes, such as:

	<ul style="list-style-type: none"> ○ Communicating information. ○ Providing instructions. ○ Sharing updates. ○ Recording information. ● Learners should recognise that the type of document used will depend on the information being communicated. <p>Teaching could include:</p> <ul style="list-style-type: none"> ● Communication within a business (internal communication). ● Communication with customers or clients (external communication). ● Examples of situations where different documents may be used in a workplace.
<p>Importance of presenting business documents clearly and accurately:</p>	<p>Definition: Ensuring business documents are organised so information is easy to read and the information included is correct.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> ● Learners must understand that business documents should: <ul style="list-style-type: none"> ○ Present information clearly so it can be easily understood. ○ Contain accurate information. ○ Be organised in a logical way. ○ Avoid spelling or formatting errors. ● Learners must recognise that clear and accurate documents help ensure information is understood correctly. <p>Teaching could include:</p> <ul style="list-style-type: none"> ● Simple document layout features such as headings and spacing. ● Examples of poorly presented documents and how they could be improved. ● The impact of errors in business documents, such as confusion or incorrect information being shared. ● Maintaining a professional presentation in business documents.

<p>Create a simple business document:</p>	<p>Definition: Producing a basic document used in a business environment using digital tools.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Learners must be able to: <ul style="list-style-type: none"> ○ Create a simple business document using digital tools. ○ Include basic business information in the document. ○ Produce a document that is suitable for a business purpose. • Examples of simple business documents may include: <ul style="list-style-type: none"> ○ Letters. ○ Emails. ○ Short reports. ○ Simple spreadsheets. ○ Basic presentations. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Creating different types of business documents. • Using templates to create documents. • Creating documents for different workplace situations.
<p>Enter and edit information:</p>	<p>Definition: Adding information to a digital document and making changes to improve or update the content.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Learners must be able to: <ul style="list-style-type: none"> ○ Enter information into a digital document. ○ Make changes to existing information. ○ Correct or update information where needed. • Examples may include: <ul style="list-style-type: none"> ○ Correcting text. ○ Adding additional information. ○ Removing incorrect information. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Copying and pasting information. • Inserting information into lists or tables.

	<ul style="list-style-type: none"> Updating information within a document.
Apply basic formatting:	<p>Definition: Using simple formatting features within digital tools to improve the appearance and readability of a document.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> Learners must be able to apply basic formatting such as: <ul style="list-style-type: none"> Changing font size or style. Using headings. Applying alignment. Using bullet points or numbered lists. Learners should understand that formatting helps make documents easier to read. <p>Teaching could include:</p> <ul style="list-style-type: none"> Inserting tables. Adjusting spacing. Using consistent formatting across a document.
Save and store documents:	<p>Definition: Saving digital documents and storing them so they can be easily identified and retrieved.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> Learners must be able to: <ul style="list-style-type: none"> Save a document using digital tools. Use appropriate file names. Store documents in a suitable digital location. Learners should understand that clear file names help identify documents. <p>Teaching could include:</p> <ul style="list-style-type: none"> Organising documents within folders. Saving different versions of documents. Retrieving saved documents when required.
Organise information logically:	<p>Definition: Arranging information within a document so it follows a clear structure and can be easily understood.</p> <p>Teaching must include:</p>

	<ul style="list-style-type: none"> • Learners must be able to: <ul style="list-style-type: none"> ○ Organise information in a clear order within a document. ○ Structure information so it can be easily followed. ○ Group related information together. • Examples may include: <ul style="list-style-type: none"> ○ Using headings. ○ Separating information into sections. ○ Organising information in lists or paragraphs. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Organising information using simple tables. • Arranging information in bullet points. • Reviewing documents to improve the structure of information.
<p>Insert simple elements such as tables or images:</p>	<p>Definition: Adding simple features within a document to support or present information more clearly.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Learners must be able to: <ul style="list-style-type: none"> ○ Insert tables within a document. ○ Insert images or simple visual elements. ○ Place these elements appropriately within a document. • Learners should understand that these elements help support the presentation of information. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Inserting shapes or icons. • Resizing images. • Adjusting the position of tables or images within a document.
<p>Prepare a document so it is suitable for sharing or printing:</p>	<p>Definition: Checking and preparing a document so it can be shared with others or printed for use.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Learners must be able to:

	<ul style="list-style-type: none"> ○ Review a document before sharing or printing. ○ Ensure information is complete and presented clearly. ○ Prepare a document for printing or digital sharing. ● Examples may include: <ul style="list-style-type: none"> ○ Checking layout. ○ Ensuring all information is visible on the page. ○ Selecting print or sharing options. <p>Teaching could include:</p> <ul style="list-style-type: none"> ● Exporting or saving documents in different formats. ● Sharing documents electronically. ● Previewing documents before printing.
<p>Spelling or formatting errors:</p>	<p>Definition: Mistakes in a document that affect the accuracy or presentation of information.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> ● Learners must be able to check documents for: <ul style="list-style-type: none"> ○ Spelling mistakes. ○ Formatting inconsistencies. ○ Errors that affect the clarity of information. ● Examples may include: <ul style="list-style-type: none"> ○ Incorrect spelling. ○ Inconsistent font size or style. ○ Incorrect alignment or spacing. <p>Teaching could include:</p> <ul style="list-style-type: none"> ● Using spell check tools. ● Reviewing document layout. ● Identifying common mistakes in business documents.
<p>Errors identified in a document:</p>	<p>Definition: Mistakes or inaccuracies found when reviewing a document.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> ● Learners must be able to: <ul style="list-style-type: none"> ○ Review a document to identify errors. ○ Recognise when information needs correcting. ○ Correct errors found within a document.

	<ul style="list-style-type: none"> • Examples may include: <ul style="list-style-type: none"> ○ Correcting spelling mistakes. ○ Editing incorrect information. ○ Adjusting formatting errors. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Reviewing documents before sharing or printing. • Checking documents against original information. • Improving document clarity during editing.
<p>Final version of a business document suitable for business use:</p>	<p>Definition:</p> <p>A completed document that has been checked and corrected so it is accurate and appropriately presented for use in a business environment.</p> <p>Teaching must include:</p> <ul style="list-style-type: none"> • Learners must be able to: <ul style="list-style-type: none"> ○ Produce a final version of a business document. ○ Ensure the document has been checked for errors. ○ Ensure the document is clearly presented and ready for use. • Examples may include: <ul style="list-style-type: none"> ○ Preparing a document for printing. ○ Preparing a document to be shared digitally. ○ Ensuring information is complete and accurate. <p>Teaching could include:</p> <ul style="list-style-type: none"> • Reviewing documents before submitting or sharing. • Ensuring formatting is consistent throughout the document. • Confirming documents meet the intended business purpose.