**Unit Title:** Personal information management software  
**OCR unit number:** 54  
**Level:** 2  
**Credit value:** 2  
**Guided learning hours:** 15  
**Unit reference number:** L/502/4370

### Unit purpose and aim

This is the ability to use software designed for the purpose of managing and organising contacts, appointments, tasks and notes.

This unit is about the skills and knowledge to use a range of personal information management tools and techniques to organise and prioritise their own time and manage multiple tasks and calendars.

<table>
<thead>
<tr>
<th>Learning Outcomes</th>
<th>Assessment Criteria</th>
<th>Examples</th>
</tr>
</thead>
</table>
| **1** Use calendars to schedule appointments and meetings | The learner can:  
1.1 Create, edit and delete multiple calendar entries  
1.2 Arrange recurring appointments  
1.3 Invite others to meetings and monitor attendance  
1.4 Respond to meeting requests from others  
1.5 Create reminders for calendar appointments and events  
1.6 Locate, organise and display appointments and events as required  
1.7 Import and export calendar data  
1.8 Describe how to share calendars with other users | Display appointments: On screen, for print; display style; filters, views, by category; customise calendar settings; multiple calendars; search and retrieve; public calendars  
Invite to meetings: Check availability, notify participants; propose alternative times; display other users’ calendars; identify conflicts and free time  
Reminders: Set alarms; send reminders to mobile devices and message services; RSS feeds  
Import and export: iCalendar, vCalendar; link tasks to calendar; synchronise calendar with mobile device  
Share calendars: Multiple calendars, user permission levels, open source and online calendars; subscribe to other calendars. Organise notes: By category, colour, date | |
| **2** Use a task list to prioritise activities | 2.1 Create, edit and delete task information  
2.2 Organise and display | Organise tasks: By category, status, target date; assign and respond to task requests; filters |
<table>
<thead>
<tr>
<th>Learning Outcomes</th>
<th>Assessment Criteria</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>tasks, setting targets for completion</td>
<td>Work collaboratively: Multiple tasks, user permission levels; composite tasks</td>
</tr>
<tr>
<td></td>
<td>2.3 Monitor task progress and set reminders</td>
<td>Task progress: Percentage completion; postpone task</td>
</tr>
<tr>
<td></td>
<td>2.4 Report on task status and activity</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2.5 Use software features to work collaboratively on tasks with other users</td>
<td></td>
</tr>
<tr>
<td>3 Use an address book to store, organise and retrieve contact information</td>
<td>3.1 Create, update and delete contact information</td>
<td>Update contacts: Multiple entries for single person; automatic updates; assign category</td>
</tr>
<tr>
<td></td>
<td>3.2 Locate, organise and display contact information efficiently</td>
<td>Organise contacts: By category, name, company; customise display, selected fields; filters; multiple contacts</td>
</tr>
<tr>
<td></td>
<td>3.3 Select and export contact details for use in other applications</td>
<td>Responsible use: Password protection, Respect confidentially; public profiles; trust, data protection</td>
</tr>
<tr>
<td></td>
<td>3.4 Create and modify a distribution list</td>
<td>Select and export: Selected fields; selected contacts; for transfer to mobile device, merge with other software</td>
</tr>
<tr>
<td></td>
<td>3.5 Share contact information with others responsibly</td>
<td>Share contact information: Beam between mobile devices, vcard</td>
</tr>
<tr>
<td></td>
<td>3.6 Explain why it is important use personal data responsibly and safely</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3.7 Describe why and how to keep contact information up to date</td>
<td></td>
</tr>
</tbody>
</table>

**Assessment**

All ITQ units may be assessed using any method, or combination of methods, which clearly demonstrates that the learning outcomes and assessment criteria have been met. Assessments must also take into account the additional information provided in the unit Purpose and Aims relating to the level of demand of:

- the activity, task, problem or question and the context in which it is set;
- the information input and output type and structure involved; and
- the IT tools, techniques or functions to be used.

See the Assessment and postal moderation section of the ITQ Centre Handbook.
Evidence requirements

Candidates must complete the Evidence Checklist for this unit with no gaps. Individual unit checklists are available to download from the qualification webpage (see forms).

Guidance on assessment and evidence requirements

Please refer to the ITQ centre handbook on our webpage.

Details of relationship between the unit and national occupational standards

This unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009).