Use Business Technology (Window 8.1, Office 2013)

This workbook supports BSBWOR204A Use business technology in:

BSB07 Business Services Training Package and BSB Business Services Training Package

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ISBN 978-1-925291-01-8

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Published and printed in Australia

BSBWOR204A Use business technology

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to select, use and maintain a range of business technology. This technology includes the effective use of computer software to organise information and data.
	No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.
Application of unit	This unit applies to individuals who use business technology to perform a range of routine tasks. They use a limited range of practical skills and fundamental knowledge of equipment use and the organisation of data or files in a defined context, under direct supervision or with limited individual responsibility.
Employability skills	This unit contains employability skills.

Ele	Element		formance Criteria	Page Reference		
1.	Select and use technology	1.1	Select appropriate <i>technology</i> and <i>software applications</i> to achieve the requirements of the task	1–4, 32–36, 57–91		
		1.2	Adjust workspace, furniture and equipment to suit user ergonomic requirements	Software Publications WHS (included in exercise file download)		
		1.3	Use technology according to <i>organisational requirements</i> and in a way which promotes a safe work environment	Throughout workbook		
2.	Process and organise data	2.1	Identify, open, generate or amend files and records according to task and organisational requirements	44, 57–86		
		2.2	Operate <i>input devices</i> according to organisational requirements	Throughout workbook		
		2.3	<i>Store data</i> appropriately and exit applications without damage to or loss of, data	Throughout workbook		
		2.4	Use manuals, training booklets and/or online help or help-desks to overcome basic difficulties with applications	38–39, 65–66		
	Maintain technology	3.1	Identify and replace used <i>technology</i> <i>consumables</i> in accordance with manufacturer's instructions and organisational requirements	10–11, 93–94		
		3.2	Carry out and/or arrange <i>routine maintenance</i> to ensure equipment is maintained in accordance with manufacturer's instructions and organisational requirements	92–98, 103–105 Software Publications WHS		
		3.3	<i>Identify equipment faults</i> accurately and take action in accordance with manufacturer's instructions or report fault to designated person	94–98 Software Publications WHS		

Performance Criteria

Skills and Knowledge

Required skills

- literacy skills to identify work requirements; to understand and process basic, relevant workplace information; and to follow written instructions
- communication skills to request advice, to receive feedback and to work with a team
- problem-solving skills to solve routine technology problems.

Required knowledge

- key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
 - anti-discrimination legislation
 - ethical principles
 - codes of practice
 - privacy laws
 - occupational health and safety (OHS)
- organisational policies, plans and procedures, especially in regard to file-naming and storage conventions
- organisational IT procedures including back-up and virus protection procedures
- basic technical terminology in relation to reading help-files and manuals.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Variable	Scope	Page reference
<i>Technology</i> may include:	computer technology, such as laptops and personal computers	2–4
	digital cameras	8
	modems	11
	printers	9, 32–36
	scanners	8
	zip drives	11
	photocopiers	1
	shredders	1
	binders	1
	laminators	1
	cutters	1
<i>Software</i> may include:	email, internet	87–91
	word processing, spreadsheet, database, accounting or presentation packages	57–86
Organisational	correctly identifying and opening files	Throughout workbook
<i>requirements</i> may include:	legal and organisation policies, guidelines and requirements	Software Publications WHS (included in exercise file download)
	locating data	40-45
	log-on procedures	17
	manufacturer's guidelines	n/a
	OHS policies, procedures and programs	Software Publications WHS
	saving and closing files	Throughout workbook
	storing data	Throughout workbook
Input devices may	keyboard	6
include:	mouse	7
	numerical key pad	6
	scanner	8
<i>Storage of data</i> may include:	appropriate storage/filing of hard copies of computer generated documents	102
	storage in directories and sub-directories	40, 46–48
	storage on CD-ROMs, hard and floppy disk drives or back-up systems	Throughout workbook

Technology	back-up tapes	10, 94
consumables may	CD-ROM	10–11, 94
include:	floppy disks	11
	print heads	n/a
	printer ribbons and cartridges	93
	toner cartridges	93
	zip disks	11
<i>Routine maintenance</i> may include:	in-house cleaning and servicing of equipment according to manufacturer's guidelines	92, 103–105
	periodic servicing by qualified or manufacturer approved, technician	94
	regular checking of equipment	94
	replacing consumables	93
Identifying equipment	checking repairs have been carried out	98
faults may include:	encouraging feedback from work colleagues	94, 95
	keeping a log book of detected faults	96
	preparing a maintenance program	n/a
	regular back-ups of data	97–98
	regular OHS inspections	Software Publications WHS
	routine checking of equipment	94

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Critical aspects for	Evidence of the following is essential:				
assessment and evidence required to demonstrate competency in this unit	• selection and application of appropriate equipment and software applications in relation to assigned task/s				
competency in this unit	• access, retrieval and storage of required data				
	• performance of basic maintenance on a range of office equipment				
Context of and specific	Assessment must ensure:				
resources for assessment	access to an actual workplace or simulated environment				
	access to office equipment and resources				
	• examples of files and data for storage				
	• manuals and training booklets for equipment.				
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:				
	• direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate				
	analysis of responses to case studies and scenarios				
	demonstration of techniques				
	• oral or written questioning to assess knowledge of office equipment				
	• evaluation of maintaining technology.				
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:				
	• IT use units				
	• other industry capability units.				

Employability Skills Mapping

Employability Skill	Industry/enterprise requirements for this qualification include	How this Employability Skill is covered
Communication	 communicating verbally with clients and colleagues drafting routine correspondence that meets the organisational standards of style, format and accuracy 	On pages 57–86 the learner is shown how to create a range of organisationally appropriate documents including letters, spreadsheets, databases and presentations.
Teamwork	• working in a team environment to promote team commitment and cooperation	n/a
Problem solving	 choosing appropriate methods for communication and transferring information dealing with client enquiries and complaints 	This workbook introduces learners to a wide range of technologies and their intended outputs. In the final assessment the student is required to select technologies appropriate for the given tasks.
Initiative and enterprise	• raising occupational health and safety issues with designated personnel	Software Publications WHS contains details about reporting occupational health and safety issues with the relevant personnel.
Planning and organising	 planning and organising own work schedule for the day planning the layout of simple documents using appropriate software 	n/a
Self management	 dealing sensitively with client needs and cultural, family and individual differences obtaining feedback on work performance and identifying opportunities for improvement 	n/a
Learning	 encouraging, acknowledging and acting on constructive feedback from team members using manuals, training booklets and online help to overcome difficulties 	38–39, 65–66
Technology	• selecting, maintaining and using business technology appropriate to the task	The whole workbook requires the learner to operate a PC running the Windows 8.1 operating system. The learner is also required to use Microsoft Word, Excel, Access, PowerPoint and Microsoft Internet Explorer.

Employability Skills for BSB20112: Certificate II in Business

Turn on the Computer

A computer is powered up by pressing the power button. On a desktop PC, the power button is usually located somewhere on the front or top of the system unit. On a laptop it may be on the front, on the side or under the lid.

With a desktop computer you may also have to turn on the monitor. This will also have a power button, generally located under the viewing area of the screen.



The Operating System – Windows 8.1

The operating system is the most basic program installed on the computer. Logging on to the computer displays the operating system interface. This workbook is for computers running the Windows 8.1 operating system.

The operating system performs all the processes that keep the computer running. Many of these processes run in the background requiring little user input. For example, the operating system ensures all devices and software applications get a share of the CPU's processing power.

The Windows 8.1 interface provides tools to:

- run other applications
- save a file to the hard drive
- arrange files and folders
- send print jobs to the printer
- customise how the computer displays data
- change hardware settings (e.g. how the mouse works).

Lock Screen

When you first turn on a Windows 8.1 machine, the Lock screen displays. The Lock screen shows the date and time and may also display Windows notifications and calendar entries.



Press any key or click the mouse to dismiss the lock screen. The Sign in screen will display.

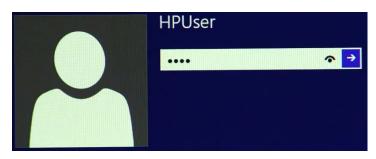
Note

The Lock screen may display after a period of inactivity, when the computer has gone into sleep mode.

Pressing the Windows key **H** L will display the Lock screen, protecting your computer from unauthorised access.

Sign in Screen

After dismissing the Lock screen the Sign in screen will display. Select your name/picture, enter your password and press Enter.



Exercise 2

- 1 Turn on your computer if required.
- 2 When the Lock screen displays, click any key to display the Sign in screen.
- 3 Select your sign in name/picture and enter your password.
- 4 Press Enter.

Options when Starting Up

There are two options for how Windows will display after signing in. This depends on how Windows 8.1 has been configured.

Option 1 – Desktop

The desktop is a coloured screen with icons and a row of buttons along the bottom of the screen.



Option 2 – Start Screen

The Start Screen contains tiles as shown below.



The Start Screen

The coloured objects on the Start screen are called **tiles**. The number and type of tiles on the Start screen will depend on the computer manufacturer and the way the computer was set up.

Tiles

Each tile on the Start screen represents a program. Clicking on a tile will start that program. By default, tiles are live, meaning they display changing information. For example, the Weather tile displays up-to-date information about the weather in your location.



Charms

Charms are used to access commonly used tools. The Charms are hidden until they are required. When summoned, the Charms menu displays at the right of the screen.

To display the Charms:

• Move the computer mouse to the top right corner of the screen.

OR

• Press **C**.

Search	Search displays a Search bar used to search for applications, settings or files.
Share	Share objects such as photos, videos and web links with other people.
Start	Select Start to return to the Start screen. If the Start screen is already displayed, selecting this Charm will display the previously viewed screen. This is the same as pressing the # key.
Devices	Use Devices to interact with equipment connected to your computer such as printers, external monitors and media device players.
Settings	Settings are used to personalise the computer, e.g. change the monitor brightness or the volume level. Settings are also used to restart and shut down the computer.

Note that some of the Charms are context sensitive – the options change depending on what you are viewing when the Charm is summoned.

Sign in Name

Your sign in name is shown at the top right corner of the Start screen. Clicking on your sign in name provides various options including signing out and switching users (if applicable).



Type a Letter

Exercise 48

- 1 With Microsoft Word open click on FILE and click on New .
- 2 Click on Blank document Blank document

By default, Word 2013 adds spacing between paragraphs, but this spacing is inappropriate for letters.

- 3 With the Home Ribbon displayed click on the Line and Paragraph Spacing button [↓] from the Paragraph Group.
- 4 Select Remove Space After Paragraph .
- 5 Display the Page Layout Ribbon and click on the Margins button . Select Custom Margins...
- 6 Change the *Top*: margin to 5 cm ^{Iop:} 5 cm . (This will allow the letter to be printed on letterhead at a later date.) Click on OK.
- 7 Display the Insert Ribbon and click on ^B Date & Time. The Date and Time dialog box will display.
- 8 Select the third option in the Date and Time dialog box and click on OK.

Available formats: 27/04/2015 Monday, 27 April 2015 27/04/15 2015-04-27

- 9 Press Enter three times.
- 10 Type the rest of the letter shown on the next page.

Mrs J Drummond
44 Rosebank Road
IVANHOE VIC 3079
Dear Mrs Drummond
Thank you for your enquiry regarding your forthcoming holiday to Sydney. I am enclosing your flight details.
As requested, I am also enclosing information about the Hawkesbury Explorer 4 Day cruises which are very popular.
Please contact me again if you wish to book a cruise or require further information.
Yours sincerely
Joan Roberts
Travel Manager

Saving a Document

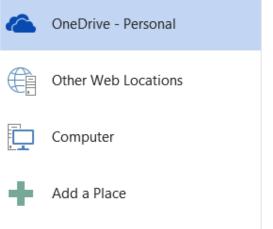
You will now save your document so it can be retrieved and edited later if required. These Save instructions can be applied to other Microsoft Office applications.

Exercise 49

Ctrl S 1 Click on the Save button \square on the Quick Access Toolbar.

Backstage view will open with the Save As screen displayed.







2 Select Computer

3

Computer at the left.



Click on _____. The Save As dialog box will display.

4 Select the text in the *File name:* box and type: Letter – Drummond

```
File name: Letter - Drummond.docx
```

The Navigation Pane is used to navigate to the save location.

5 Use the appropriate instruction below to locate the folder where the document is to be saved.

To locate a portable USB drive

- Ensure your portable drive is connected to your computer.
- Select the portable drive from under This PC will vary depending on your computer configuration). (the drive name and letter

To locate the Documents folder

Click on Documents under This PC.

This PC
 Desktop
 Documents

To locate folders on a Network drive

If you have a folder on a network drive, it may be listed under **Network** in the Navigation Pane. Consult with your trainer, supervisor or network administrator to check you are accessing the correct network location.



The file will be saved with the name **Letter - Drummond**. This file name is displayed in the Title bar of the document.

7 Close the file.

Presentation Software

Presentation software is used to create a slide show with graphics and sound enhancements to present information visually, e.g. promote a product to an audience.



Opening a Presentation in PowerPoint

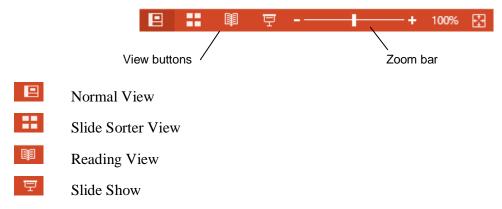
Exercise 62

	P 🔄
1	Open PowerPoint by going to the Start screen and clicking on PowerPoint 2013 OR
	typing PowerPoint into the Start screen and selecting
	PowerPoint will open with the Startup screen displayed.
2	Click on Open Other Presentations at the bottom left of the screen.
3	Click on Computer . Click on Browse
4	Navigate to your exercise files and double click on the file called Randalls Book

- Stores. When you enter the presentation the first slide will display on the screen.
- 5 Keep the presentation open for the next exercise.

View Buttons

There are different ways you can view a presentation. View buttons are displayed at the bottom right of the PowerPoint window by the Zoom bar.



Thumbnails

The thumbnails display at the left of the PowerPoint screen. Clicking on the relevant thumbnail displays that slide.

Exercise 63

- 1 Using **Randalls Book Store**, check Normal View is selected from the View buttons at the bottom right of the screen.
- 2 Click on the slide 2 thumbnail at the left of the screen. Note that the slide number is displayed at the left of each thumbnail.



The slide will be displayed in the main part of the window.

- 3 Press the down arrow on the keyboard. The slide 3 thumbnail will be selected and Slide 3 will be displayed in the main window.
- 4 Move through all the slides in the presentation viewing each one.
- 5 Press Ctrl Home to move to the first slide.
- 6 Click on the Slide Sorter View button . All the slides in the presentation will be displayed as icons. This view is used primarily to reorder slides.



- 7 Click on the Slide Show button To run the file as an on screen presentation. The first slide will be displayed full screen.
- 8 Press the Spacebar OR click the left mouse button to move to the next slide. Keep pressing the Spacebar or clicking the mouse button to display all the text on the slide.

Note

Press the Esc key at the top left of the keyboard to exit the presentation at any time.

- 9 Once you reach the end of the slide show the screen will appear black with the following text at the top of the screen End of slide show, click to exit. Click with the mouse to exit the slide show.
- 10 Keep the presentation open for the next exercise.

Creating a Slide

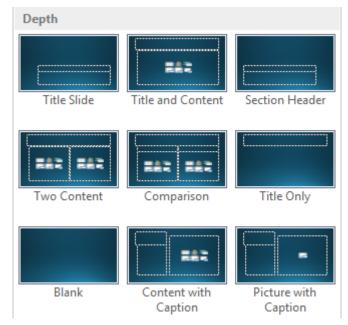
Exercise 64

A new slide is required in the presentation to show the names of the staff who will be managing the new stores. This slide is to be placed after Slide 2 - New Stores Opening.

1 Using **Randalls Book Store**, check Slide Sorter View is displayed. Double click on Slide 2 to display it.

New

2 Display the Home Ribbon. Click on the bottom half Slide v of the New Slide button Slide v. A list of slide layouts will display.



- Click on Title and Content to display a slide with this layout.The Content area is used to insert a table, chart, picture, diagram or media clip.
- 4 With slide 2 displayed, click in the *Click to add title* box and type: New Store Managers

5 Click in the *Click to add text* box and type: North Shore – Madeline Kent and press Enter.

A new bullet will appear. If you press Enter too many times, press the Backspace key to remove the extra bullet(s).

Add the following text as further bullets pressing Enter at the end of each line so your slide 6 displays as shown below.

	New Store Managers
	 North Shore – Madeline Kent Atlantis Mall – Jack Galloway Beach Front Mall – Wendy Wills The Rocks – Francis Bradley
7	With the mouse curser within the bulleted text press Ctrl A to select the text.
8	With the Home Ribbon displayed, click on the Font Size \checkmark and select 40 40 \checkmark .
9	Click on the Save button 🗟.
10	Display the first slide.
11	Click on $\overline{\Box}$ to view the new slide in Slide Show View.
12	Press the Esc key to return to the slide.
13 No	Click on FILE and click on Close . Leave PowerPoint open for the next exercise.

Ν sentation

Exercise 65

- FILE New and select Click on 1
- 2 Click on Blank Presentation

When a new presentation is created, a blank Title Slide will appear. A layout has been applied to the slide, making it easy for you to add text.

3 Click in the *Click to add title* box in the centre of the slide.

Evidence Guide

ElementPerformance CriteriaElements describePerformance criteria describe the performance needed to demonstrate achievement of the element.outcomes.Performance criteria describe the performance needed to demonstrate achievement of the element.		Assessment task	
1. Select and use technology	1.1 Select appropriate <i>technology</i> and <i>software</i> <i>applications</i> to achieve the requirements of the task	Task 1	
	1.2 Adjust workspace, furniture and equipment to suit user ergonomic requirements	Task 2	
	 1.3 Use technology according to <i>organisational</i> <i>requirements</i> and in a way which promotes a safe work environment 	Task 2, Task 3	
2. Process and organise data	2.1 Identify, open, generate or amend files and records according to task and organisational requirements	Task 3	
	2.2 Operate <i>input devices</i> according to organisational requirements	Task 2, Task 3	
	2.3 <i>Store data</i> appropriately and exit applications without damage to or loss of, data	Task 3	
	2.4 Use manuals, training booklets and/or online help or help-desks to overcome basic difficulties with applications	Task 3	
3. Maintain technology	3.1 Identify and replace used <i>technology consumables</i> in accordance with manufacturer's instructions and organisational requirements	Task 2	
	3.2 Carry out and/or arrange <i>routine maintenance</i> to ensure equipment is maintained in accordance with manufacturer's instructions and organisational requirements	Task 2	
	3.3 <i>Identify equipment faults</i> accurately and take action in accordance with manufacturer's instructions or report fault to designated person	Task 3	

Required Skills and Knowledge

Required Skills	Assessment task
• literacy skills to identify work requirements; to understand and process basic, relevant workplace information; and to follow written instructions	Task 3
• communication skills to request advice, to receive feedback and to work with a team	Task 2
• problem-solving skills to solve routine technology problems.	Task 1, Task 3

Required Knowledge	Assessment task
 key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as: anti-discrimination legislation 	Task 2
 ethical principles codes of practice privacy laws occupational health and safety (OHS) 	Task 2
• organisational policies, plans and procedures, especially in regard to file-naming and storage conventions	Task 2, Task 3
organisational IT procedures including back-up and virus protection procedures	Task 3
• basic technical terminology in relation to reading help-files and manuals.	Task 3

Critical Aspects for Assessment

Evidence of the following is essential:	Assessment task
• selection and application of appropriate equipment and software applications in relation to assigned task/s	Task 1
• access, retrieval and storage of required data	Task 3
• performance of basic maintenance on a range of office equipment	Task 2

Employability Skills BSB20112 Certificate I in Business

Employability skills for BSB20112 Certificate II in Business are assessed in the following assessment tasks.

Employability Skill	Industry/Enterprise Requirements for this Qualification Include:	Assessment task
Communication	 communicating verbally with clients and colleagues drafting routine correspondence that meets the organisational standards of style, format and accuracy 	Task 3
Teamwork	• working in a team environment to promote team commitment and cooperation	n/a
Problem-solving	 choosing appropriate methods for communication and transferring information dealing with client enquiries and complaints 	Task 1, Task 3
Initiative and enterprise	• raising occupational health and safety issues with designated personnel	Task 2
Planning and organising	 planning and organising own work schedule for the day planning the layout of simple documents using appropriate software 	Task 3
 dealing sensitively with client needs and cultural, family and individual differences obtaining feedback on work performance and identifying opportunities for improvement 		n/a
Learning	 encouraging, acknowledging and acting on constructive feedback from team members using manuals, training booklets and online help to overcome difficulties 	Task 3
Technology	• selecting, maintaining and using business technology appropriate to the task	Tasks 1, 2 and 3

BSB Business Services Training Package Supplement

This workbook can be used by learners completing a qualification in the BSB Business Services Training Package.

BSBWOR204 Use business technology

Application

This unit describes the skills and knowledge required to select and use computer software and organise electronic information and data.

It applies to individuals who apply a limited range of practical skills with a fundamental knowledge of equipment use and the organisation of data in a defined context, under direct supervision or with limited individual responsibility.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Element Elements describe the essential outcomes.	Performance Criteria <i>Performance criteria describe the</i> <i>performance needed to demonstrate</i> <i>achievement of the element.</i>	Workbook pages	Assessment tasks
1. Select and use technology	1.1 Select appropriate technology and software applications to achieve the requirements of the task	1–4, 32–36, 57–91	Task 1
	1.2 Adjust workspace, furniture and equipment to suit user's ergonomic requirements	Software Publications WHS	Task 2
	1.3 Use technology according to organisational requirements and in a way that promotes a safe work environment	Throughout workbook	Task 2 Task 3
2. Process and organise data	2.1 Identify, open, generate or amend files and records according to task and organisational requirements	44, 57–86	Task 3
	2.2 Operate input devices according to organisational requirements	Throughout workbook	Task 2 Task 3
	2.3 Store data appropriately and exit applications without damage to or loss of, data	Throughout workbook	Task 3
	2.4 Use manuals, training booklets and/or online help or helpdesks to overcome basic difficulties with applications	38–39, 65–66	Task 3
3.Maintain technology	3.1 Identify and replace used technology consumables in accordance with manufacturer's instructions and organisational requirements	10–11, 93–94	Task 2
	3.2 Carry out and/or arrange routine maintenance to ensure equipment is maintained in accordance with manufacturer's instructions and organisational requirements	92–98, 103– 105 Software Publications WHS	Task 2
	3.3 Identify equipment faults accurately and take action in accordance with manufacturer's instructions or report fault to designated person	94–98 Software Publications WHS	Task 3

Elements and Performance Criteria

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

Skill	Performance Criteria	Description	Page reference
Reading	1.3, 2.1, 2.2, 2.4, 3.1-3.3	Recognises and interprets information from familiar sources to determine job role and task requirements	Whole workbook
Writing	2.1, 2.3, 3.2, 3.3	Produces and amends files to meet task and organisational requirements	57–86
		Completes required documentation using organisational formats	57–86
Oral communication	3.3	Uses specific and relevant language to refer faults to others	95–96
Navigate the world of work	1.2, 1.3, 2.1, 2.2, 3.1-3.3	Recognises and follows legislative requirements and organisational policies and procedures associated with own role	54 Software Publications WHS pdf document
Get the work done	1.1, 1.3, 2.1-2.4, 3.1-3.3	Uses business technologies and systems safely, when gathering, storing, accessing and sharing information	Whole workbook
		Understands purposes, specific functions and key features of common digital systems and business tools	Whole workbook
		Operates digital systems and business tools effectively to complete routine tasks using some basic troubleshooting strategies as required	Whole workbook

Assessment Requirements v1.0

Performance Evidence

Evi	dence of the ability to:	Assessment task
•	select and use technology safely and according to organisational requirements	All assessment tasks
•	access, retrieve and store required data	Task 2, Task 3
•	demonstrate basic maintenance on a range of equipment using manuals or help-files	Task 2
•	identify and address faults according to requirements.	Task 2, Task 3

Knowledge Evidence

	complete the unit requirements safely and ectively, the individual must:	Assessment task
•	outline the organisation's work health and safety requirements	Task 2
•	outline the organisation's requirements for file naming and storage	Task 3
•	explain why regular back-ups of data are done	Task 3
•	list 'routine maintenance' tasks	Task 3
•	summarise the procedure for addressing equipment faults.	Task 3