

Instructional Framework

Business Operations

52.0408.00

This Instructional Framework identifies, explains, and expands the content of the standards/measurement criteria, and, as well, guides the development of multiple-choice items for the Technical Skills Assessment. This document corresponds with the Technical Standards endorsed on May 24, 2017.



Domain 1: Technology Applications

Instructional Time: 45-50%

STANDARD 1.0 APPLY WORD PROCESSING SOFTWARE TO PRODUCE DOCUMENTS

1.1 Create and manage documents	<ul style="list-style-type: none">• Creating documents<ul style="list-style-type: none">◦ Creating a new document◦ Open existing documents◦ Opening from a template• Creating folders/sub folders• Save vs Save As
1.2 Format text, paragraphs, and sections	<ul style="list-style-type: none">• Formatting marks• Toolbars, ribbons, tabs• Text selection• Format text
1.3 Create tables and lists	<ul style="list-style-type: none">• Creating tables<ul style="list-style-type: none">◦ Adding /removing rows and columns◦ Formatting• Create lists<ul style="list-style-type: none">◦ Bullets◦ Numbering◦ Promoting/demoting within a list
1.4 Create and manage references (e.g., footnotes, endnotes, bibliography, citation, table of contents, and figure and table captions)	<ul style="list-style-type: none">• Footnotes• Endnotes• Bibliography• Citation• Table of contents• Figure• Table captions

1.5 Insert and format graphic elements	<ul style="list-style-type: none"> • Inserting images from different locations • Formatting images/graphics • Toolbars associated with graphics
STANDARD 2.0 COMPOSE DOCUMENTS FOR PRESENTATION	
2.1 Create and manage presentations	<ul style="list-style-type: none"> • Creating presentations <ul style="list-style-type: none"> ◦ Creating a new presentation ◦ Opening existing presentations ◦ Opening from a template ◦ Themes/layouts • Creating new slides • Creating folders/subfolders • Save vs Save As
2.2 Insert and format text, shapes, and images	<ul style="list-style-type: none"> • Placeholder • Toolbars, ribbons, tabs • Text selection • Format text • Inserting images from different locations • Formatting images/graphics • Toolbars associated with graphics
2.3 Insert tables, charts, graphics, and media	<ul style="list-style-type: none"> • Creating tables <ul style="list-style-type: none"> ◦ Adding /removing rows and columns ◦ Formatting • Creating charts and graphics • Creating/inserting media
2.4 Apply transitions, animations, and timing	<ul style="list-style-type: none"> • Explore options for: <ul style="list-style-type: none"> ◦ Transitions ◦ Animations ◦ Timing • Professional purpose and intention of each
2.5 Manage multiple presentations	<ul style="list-style-type: none"> • Merging multiple presentations
2.6 Use on-line presentation technologies in addition to PPT and slides (i.e., Prezi, Adobe Slate, etc.)	<ul style="list-style-type: none"> • Google Slides

STANDARD 3.0 USE SPREADSHEET SOFTWARE TO PRODUCE DOCUMENTS

3.1 Create and manage worksheets and workbooks (e.g., print area and print scaling)

- Creating workbooks
 - Creating a new workbook
 - Open existing workbook
 - Opening from a template
- Creating new worksheets
- Print formatting and scaling
- Creating folders/subfolders
- Save vs Save As

3.2 Manage data cells and ranges

- Formatting cells
- Workbook navigation

3.3 Create tables

- Creating tables within a workbook
- Creating and managing pivot tables

3.4 Perform operations with formulas and functions

- Basic formulas (+, -, *, /)
- Basic functions (SUM, AVG, MIN, MAX, COUNT)
- Cell references including:
 - Absolute vs relative
- AutoFill

3.5 Create charts and objects

- Creating charts
 - Understanding the data
- Creating objects

STANDARD 4.0 APPLY COMMUNICATION, COLLABORATION, AND EMAIL SKILLS

4.1 Configure email client

- Account information
- Managing settings

4.2 Create, format, organize, and manage messages

- Composing messages
- Recipients
 - Reply, Reply All, Forward
 - Cc, Bcc
- Formatting messages
- E-mail etiquette
- Creating folders
- Managing settings

4.3 Create and manage calendars, meetings, notes, and tasks	<ul style="list-style-type: none"> • Calendar set-up • Creating appointments and meetings • Managing multiple calendars
4.4 Create and manage contacts and groups	<ul style="list-style-type: none"> • Create and manage contacts and groups
STANDARD 5.0 USE DATABASE SOFTWARE TO PRODUCE DOCUMENTS	
5.1 Maintain and edit a database	<ul style="list-style-type: none"> • Adding fields • Maintaining records
5.2 Identify queries	<ul style="list-style-type: none"> • Identify queries to view specific records
5.3 Create forms	<ul style="list-style-type: none"> • Creating new forms to enter data
5.4 Create reports	<ul style="list-style-type: none"> • Creating functional reports from the database • Formatting reports
5.5 Determine tables and fields	<ul style="list-style-type: none"> • Differentiating between tables and fields
STANDARD 12.0 DEMONSTRATE PROFICIENCY NAVIGATING THE INTERNET	
12.1 Characterize Universal Resource Locators (URLs) and associated protocols (e.g., .com, .org, .edu, .gov, .net, and .mil)	<ul style="list-style-type: none"> • Identify and differentiate common usage of top-level domains
12.2 Demonstrate proficiency in using search engines and applying operators and filters	<ul style="list-style-type: none"> • Applying operators to filter search results <ul style="list-style-type: none"> ◦ “ ” ◦ And ◦ Or ◦ Not ◦ Wild cards like * ◦ Etc.
12.3 Compare and contrast various methods of online storage and transfer of files	<ul style="list-style-type: none"> • Identify and differentiate between different cloud storage applications

Domain 2: Operations Support
Instructional Time: 45-50%

STANDARD 6.0 DEMONSTRATE AN UNDERSTANDING OF THE FUNCTIONS AND RESPONSIBILITIES OF A BUSINESS ASSISTANT

6.1 Explore career opportunities for a business assistant (e.g., virtual assistant, receptionist, office manager, clerk, and administrative assistant)	<ul style="list-style-type: none"> • Differentiate between the job functions/descriptions associated with various business assistant positions
6.2 Demonstrate proficiency in keyboard functions and keyboarding skills (minimum 40 wpm)	<ul style="list-style-type: none"> • Typing a minimum of 40 words per minute • Posture, motion and ergonomics <ul style="list-style-type: none"> ◦ Body placement ◦ Equipment • Identification and purpose of keyboard functions
6.3 Compare and contrast the functions of management (i.e., planning, organizing, staffing, directing, controlling, etc.) and their relationship	<ul style="list-style-type: none"> • 5 Functions of Management and the roles of each
6.4 Practice project management skills	<ul style="list-style-type: none"> • Basic project management breakdown <ul style="list-style-type: none"> ◦ Set goal ◦ Plan ◦ Do ◦ Review/Reflect
6.5 Explain the purpose of notarization and medallion/signature guarantee	<ul style="list-style-type: none"> • Define notarization and explain the purpose
6.6 Prepare a physical mailing (e.g., labels, handwritten, and postcards)	<ul style="list-style-type: none"> • Address documents for mailing <ul style="list-style-type: none"> ◦ Envelope/mailer formatting • Perform mail merge

STANDARD 7.0 ESTABLISH AND FOLLOW PROCEDURES TO MANAGE RECORDS

7.1 Create a filing system to preserve and retrieve records	<ul style="list-style-type: none"> • Filing by <ul style="list-style-type: none"> ◦ Subject ◦ Geographic ◦ Chronological ◦ Numerical ◦ Name
7.2 File, archive, and destroy materials according to regulatory policy to manage records	<ul style="list-style-type: none"> • Determine retention schedule for keeping files and when to archive them

	<ul style="list-style-type: none"> Identify types of file that should be destroyed and how to dispose of them
7.3 Choose document priorities to interpret file hierarchy	<ul style="list-style-type: none"> Create folders and subfolders
7.4 Use computer skills to manage electronic files	<ul style="list-style-type: none"> Create folders and subfolders Drag and Drop Cut/Copy and Paste
STANDARD 8.0 PLAN AND PARTICIPATE IN FACE-TO-FACE AND VIRTUAL MEETINGS	
8.1 Prepare and assemble materials and documentation for meetings	<ul style="list-style-type: none"> Creating documents <ul style="list-style-type: none"> Agenda Attendance Sheets Supporting materials
8.2 Prepare meeting facilities and equipment (e.g., reserve space and ensure technology is functioning)	<ul style="list-style-type: none"> Booking facilities and equipment Arranging for technology requirements Preparing the meeting rooms for presentations and activities Technology permissions for meeting participants Explore various online meeting platforms and their technological specifications
8.3 Take notes and prepare meeting minutes and related documentation	<ul style="list-style-type: none"> Take notes Prepare meeting minutes And prepare related documentation
STANDARD 9.0 PREPARE TRAVEL ARRANGEMENTS	
9.1 Select suitable lodging and transportation to arrange travel according to company policy	<ul style="list-style-type: none"> Compare a variety of company policies Analyze various booking resources Compare amenities for intended purpose of travel
9.2 Plan travel and meeting itinerary	<ul style="list-style-type: none"> International travel requirements Appropriate scheduling of travel events Develop an itinerary including dates, times and activities
9.3 Prepare travel claims post-travel for reimbursement to traveler	<ul style="list-style-type: none"> Prepare post-travel claims that include receipts for lodging, transportation, meals and misc. expenses
9.4 Apply knowledge of domestic/international time zones and currency exchange rates	<ul style="list-style-type: none"> Identify resources for currency exchange rates Compare domestic and international time zones

STANDARD 10.0 DEMONSTRATE TELEPHONE SKILLS TO COMMUNICATE EFFECTIVELY

10.1 Record and deliver accurate messages to appropriate parties

- Messaging components including:
 - Date and time of call
 - Name of caller
 - Name of caller's company or other affiliation
 - Caller's phone number
 - Detailed message
 - Message recorded
- Company delivery guidelines

10.2 Use professional telephone etiquette and screening techniques when placing and receiving calls

- Receiving calls
 - Answer timely
 - Identify yourself
 - Assist - screen, transfer, conclude
- Screening calls
 - Determine who is calling and purpose of calls
- Placing calls
 - Identify yourself
 - State your purpose
 - Know your information before placing call
- Using etiquette

STANDARD 13.0 DEMONSTRATE KNOWLEDGE OF THE NEED FOR ETHICAL BEHAVIOR IN THE WORKPLACE

13.1 Explain concepts of conflict of interest and intellectual property

- Explain conflict of interest
- Explain intellectual property

13.2 Evaluate reasons for keeping employer and customer information confidential and/or privileged

- Legal ramifications of exposing confidential/privileged information
- Effects on company culture, reputation, and customers

13.3 Explore ethical issues arising from copyright infringements (e.g., downloading and sharing applications without license(s), copyright laws, and regulatory control)

- Explore ethical issues arising from copyright infringements

13.4 Identify and describe use and misuse of company resources (e.g., using office for personal use, and stealing office supplies)

- Identify and describe use and misuse of company resources
 - Time
 - Mileage
 - Resources
 - Equipment
 - Social Media

- o Finance

Domain 3: Financial Procedures
Instructional Time: 10-15%

STANDARD 11.0 MAINTAIN RECORDS AND REPORTS TO MANAGE CASH AND BANKING PROCEDURES

11.1 Perform transactions to manage petty cash and banking procedures

- Following petty cash and banking procedures as outlined in company policies
- Petty cash procedures may include:
 - o Establishing funds
 - o Making payments
 - o Keeping records
 - o Replenishing funds

11.2 Maintain accurate balance sheets/ledgers

- Identify the difference between balance sheets and ledgers.
- Ledgers include:
 - o Revenue
 - o Expenses
 - o Debits
 - o Credits
- Balance sheets include:
 - o Assets
 - o Liabilities
 - o Owners' Equity

11.3 Organize and tally receipts and proof work to prepare bank deposits

- Complete a deposit slip
- Appropriate endorsements
- Accurately tally and reconcile receipts for a bank deposit

11.4 Identify various forms of business payment options (e.g., credit card, pcard, checks, and electronic transfers)

- Identify various forms of business payment options