



# Candidate Resource and Assessment

**BSBITU203A**

## Communicate Electronically



**Whether as an individual, or as part of a group, real progress depends on entering whole-heartedly into the process and being motivated to make you a more deeply satisfied human being.**

*Focusing on your training needs*



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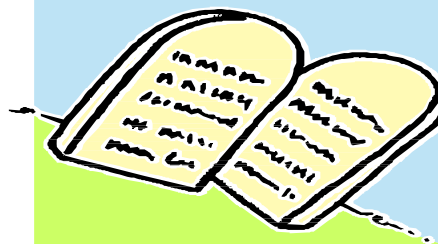
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**"You're either part of the solution or part of the problem".**

**Eldridge Cleaver**

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SAMPLE

## Focus on

# Your Area of Influence

Use considered risk taking in your 'grey' area

## And others will follow you!

<b>Legend</b>	This course is divided into several sections of learning. Each section begins with the title of the element of the unit being taught, a quotation and a graphic related to content across the top of the page.
	This symbol indicates the beginning of new content. The bold title matches the content of the competency and they will help you to find the section to reference for your assessment activities.
	<b>Activity:</b> Whenever you see this symbol, there is an activity to carry out which has been designed to help reinforce the learning about the topic and take some action.
	This symbol is used at the end of a section to indicate the summary key points of the previous section.

## Qualification Pathways



**A goal without a plan is just a wish.**

**Antoine de Saint-Exupery**

### Qualification Pathways

This unit of competency is provided to meet the requirements of BSB07 Business Services Training Package although can be used in a range of different qualifications. The BSB07 Business Services Training Package does not state how a qualification is to be achieved. Rather, Registered Training Organisations are required to use the qualification rules to ensure the needs of the learner and business customer are met. This is to be achieved through the development of effective learning programs delivered in an order which meets the stated needs of nominated Candidates and business customers.

### Qualification Rules

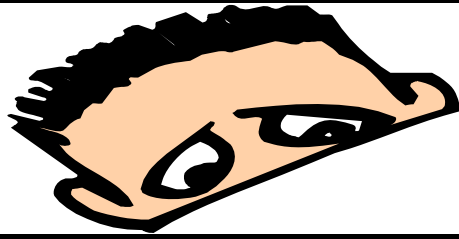
Qualification requirements include core and elective units. The unit mix is determined by specific unit of competency requirements which are stated in the qualification description. Registered Training Organisations then work with learners and business customers to select elective units relevant to the work outcome, local industry requirements and the qualification level.

All vocational education qualifications must lead to a work outcome. BSB07 Business Services Training Package qualifications allows for Registered Training Organisations (RTOs) to vary programmes to meet:

- Specific needs of a business or group of businesses.
- Skill needs of a locality or a particular industry application of business skills.
- Maximum employability of a group of students or an individual.

When packaging a qualification elective units are to be selected from an equivalent level qualification unless otherwise stated.

## Introduction



"If learning comes through experience, it follows that the more one participates in guided experiences, the more one learns. Therefore venturing into uncharted waters - and experiencing the failures that may occur - is an important part of organisational learning."

Gould, DiBella, Nevis

### Introduction

This unit of competency is about being able to communicate while online. It will help you with the skills you need to demonstrate competency for the unit *BSBITU203A Communicate Electronically*. This is one of the units that make up the Certificates in Business.

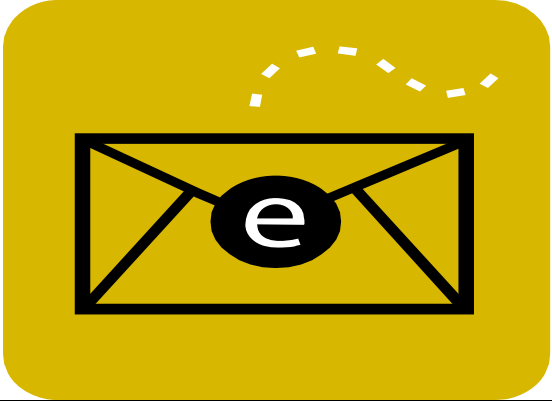
This training is broken up into three distinct sections. They are:

1. **Implement Procedures to Send and Receive Electronic Mail:** First we will examine what exactly email is, as well as checking the email that you have sent.
2. **Manage Electronic Mail:** In this section, we will turn to how to use your email software to improve your efficiency at work, as well as how to ensure your email is backed up appropriately.
3. **Collaborate Online:** We will then move on to examine the process of online collaboration. In particular we will examine using Microsoft Office in the collaboration process – using it to review and make changes to documentation.

At the conclusion of this training you will be asked to complete an assessment pack for this unit of competency. The information contained in this resource will assist you to complete this task.

On attaining competency on this unit of competency you will have demonstrated your ability to communicate online using email and online collaboration.

SAMPLE

<p><b>BSBITU203A/01</b></p> <p><b>Implement Procedures to Send and Receive Electronic Mail</b></p>	
<p><b>"We love life, not because we are used to living but because we are used to loving."</b></p> <p style="text-align: right;"><b>Nietzsche</b></p>	



**Log in to software for sending and receiving email in accordance with organisational requirements**

**Check outgoing email for accuracy and ensure any required attachments are prepared, in accordance with organisational and service provider requirements**

**Identify urgent, confidential, personal, suspicious or potentially dangerous email and take appropriate actions**

**Deal with returned email in accordance with organisational policies and procedures**

### **What Is E-Mail?**

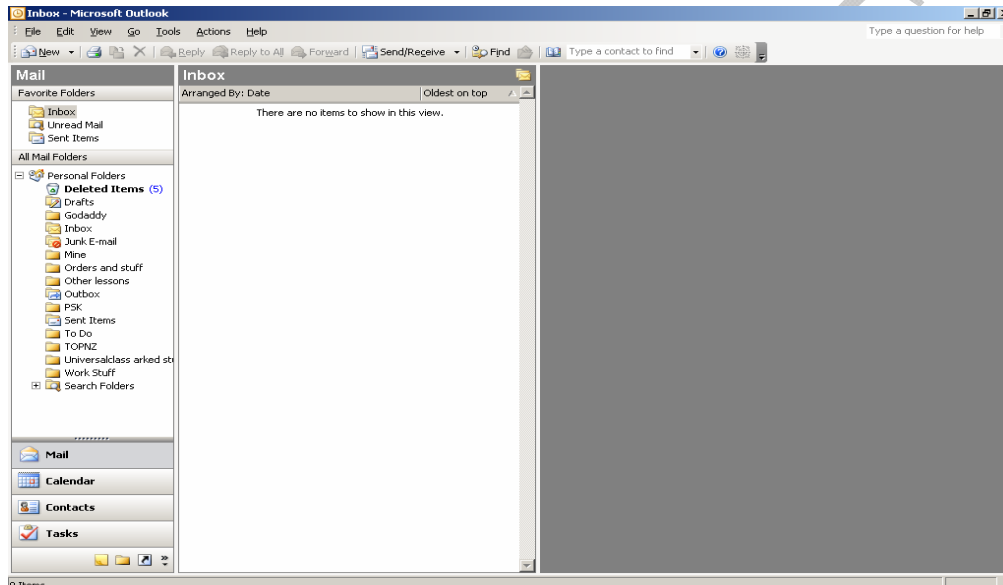
E-Mail is short for Electronic Mail, the transmission of messages over communications networks. The messages can be notes entered from the keyboard or electronic files stored on disk. Most mainframes, minicomputers, and computer networks have an e-mail system. Some electronic-mail systems are confined to a single computer system or network, but others have gateways to other computer systems, enabling users to send email anywhere in the world. Companies that are fully computerised make extensive use of e-mail because it is fast, flexible, and reliable.

Most e-mail systems include a rudimentary text editor for composing messages, but many allow you to edit your messages using any editor you want. You then send the message to the recipient by specifying the recipient's address. You can also send the same message to several users at once. This is called *broadcasting*.

Sent messages are stored in electronic mailboxes until the recipient fetches them. To see if you have any mail, you may have to check your electronic mailbox periodically, although many systems alert you when mail is received. After reading your mail, you can store it in a text file, forward it to other users, or delete it. Copies of memos can be printed out on a printer if you want a paper copy.

## Email Software

Email software allows you to send, receive and store your email. There are two major types of email software. The first type utilises software installed on your computer, while the other (known as web mail) uses web pages to access your email. Generally in business you will use an application to compose, send and receive your email. Common email packages include *Outlook®*, *Outlook® Express*, and *Thunderbird*. Email software is often bundled with a web browser. The second form of email software involves web pages. These web mail systems are commonly used for personal use. There are a huge range of web mail providers including *Yahoo Mail*, *Hotmail* and *Gmail*. You access these through your web browser by visiting the webpage.



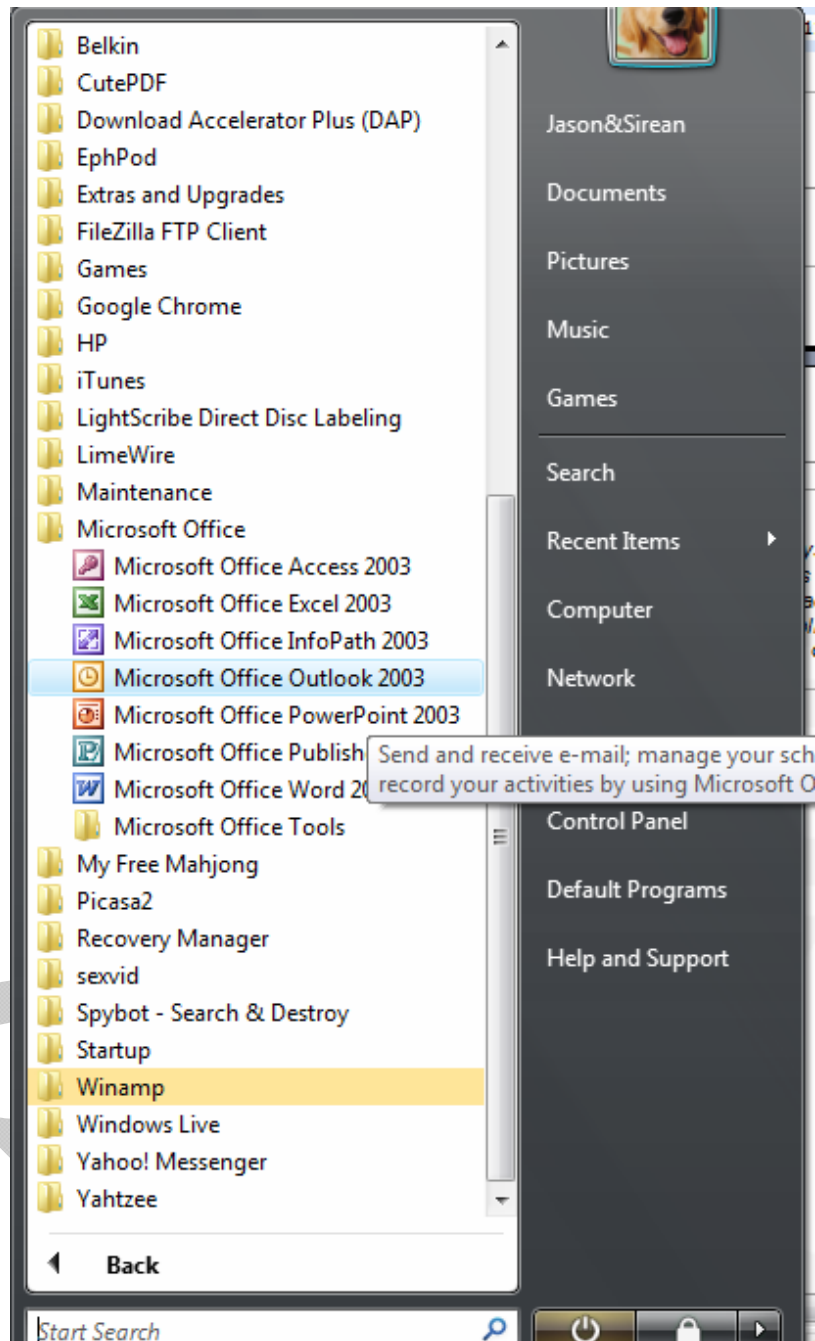
**Microsoft Outlook® is a comprehensive and extremely powerful Email application.**

Common email applications include:

Common E-Mail Applications	
<b><i>Eudora</i></b>	<a href="http://www.eudora.com">http://www.eudora.com</a>
<b><i>IBM Lotus Notes</i></b>	<a href="http://www.ibm.com/software/notes">http://www.ibm.com/software/notes</a>
<b><i>Mail</i></b>	Included as a part of the Mac Operating System
<b><i>Microsoft Outlook®</i></b>	Included as a part of Microsoft Office
<b><i>Mozilla Thunderbird</i></b>	<a href="http://www.mozilla.com/thunderbird">http://www.mozilla.com/thunderbird</a>
<b><i>Windows Live Mail</i></b>	<a href="http://get.live.com/wlmail/overview">http://get.live.com/wlmail/overview</a>

## Logging Into Your Email

There are various ways of logging into your email system. The method used will vary depending on the systems used. Most organisations utilise a desktop application to access their email. Generally speaking, this will already be set up for you and all you will need to do to access your email is open the application. You may have a desktop icon that you can double click to access your email, or you may be able to access it via the start menu.



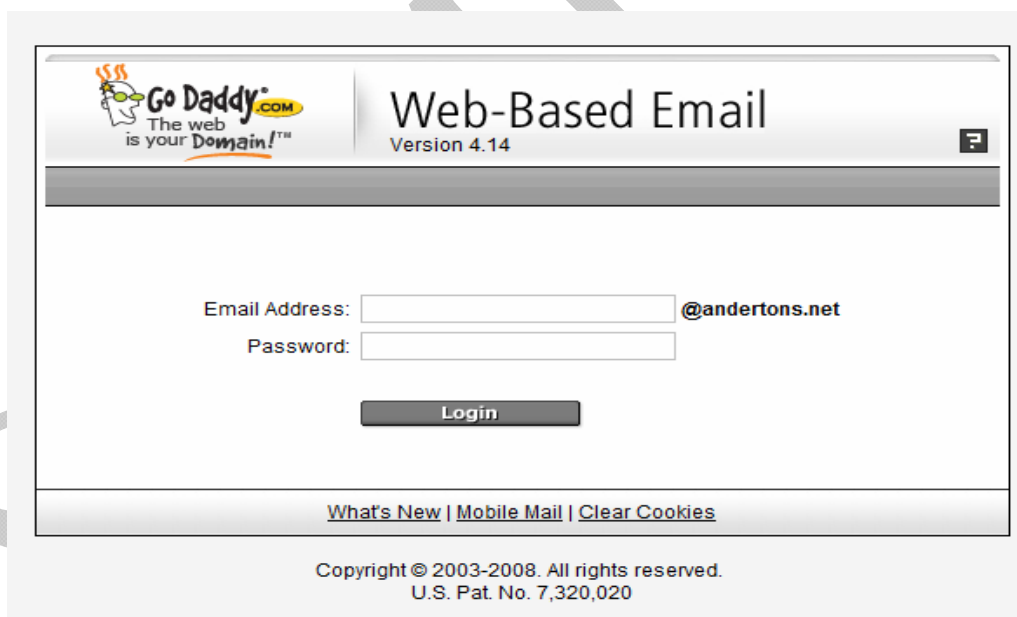
**Opening Outlook® in Windows Vista.**

Once you have logged into your email, accessing it will depend on your application and/or setup.

- Generally speaking most applications will be set up to check for your email whenever you click the send/receive button. When you click this button, your client will send any waiting email and then receive any new mail.
- Some applications may be set up to check for new mail as soon as the application is opened. In this case, you do not need to do anything beyond opening the application itself.

Some organisations may utilise a web based system for accessing their email. This enables staff to check their email from any computer or even mobile devices. In order to access your email using this system:

- Access your webmail client's email address. This will vary from organisation to organisation, but may be found on the desktop as a shortcut or may be in a form such as <http://webmail.organisation.com> or <http://www.organisation.com/webmail>.
- Once at your webmail's login screen, enter your login information (generally your email address) and password.
- Click the login button.
- Once logged in your email will be displayed in the inbox.



The screenshot shows a webmail login interface. At the top left is the Go Daddy logo with the tagline 'The web is your Domain!™'. To the right, it says 'Web-Based Email Version 4.14'. Below this is a large empty space. In the center, there are two input fields: 'Email Address:' followed by a text box containing '@andertons.net', and 'Password:' followed by an empty text box. Below these is a 'Login' button. At the bottom of the main content area, there are links for 'What's New | Mobile Mail | Clear Cookies'. Below the main content area, there is a copyright notice: 'Copyright © 2003-2008. All rights reserved. U.S. Pat. No. 7,320,020'.

**A typical webmail login screen.**

### **Writing E-Mails**

Electronic communication, because of its speed and broadcasting ability, is fundamentally different from paper-based communication. Because the turnaround time can be so fast, email is more conversational than traditional paper-based media.

In a paper document, it is absolutely essential to make everything completely clear and unambiguous because your audience may not have a chance to ask for clarification. With email documents, your recipient can ask questions immediately. Email thus tends, like conversational speech, to be sloppier than communications on paper.

This is not always bad. It makes little sense to spend hours over a simple message, making sure that your spelling is faultless, your words eloquent, and your grammar beyond reproach, if the point of the message is to tell your co-worker that you are ready to go to lunch.

However, your correspondent also won't have normal status cues such as dress, diction, or dialect, so may make assumptions based on your name, address, and - above all - facility with language. You need to be aware of when you can be sloppy and when you have to be meticulous. Email also does not convey emotions nearly as well as face-to-face or even telephone conversations. It lacks vocal inflection, gestures, and a shared environment. Your correspondent may have difficulty telling if you are serious or kidding, happy or sad, frustrated or euphoric. Sarcasm is *particularly* dangerous to use in email.

Another difference between email and other media is that what the sender sees when composing a message might not look like what the reader sees. Your vocal cords make sound waves that are perceived basically the same by both your ears and your audience's. The paper that you write your love note on is the same paper that the object of your affection sees. But with email, the software and hardware that you use for composing, sending, storing, downloading, and reading may be completely different from what your correspondent uses. Your message's visual qualities may be quite different by the time it gets to someone else's screen.

The underlying rules governing email transmission are highly standardised, but there are a large number of different software programs that can be used to read email. It's quite possible that the message you send won't look at all the same when displayed on your correspondent's screen. You therefore have to be careful about how you present your text. This section will discuss the problems that may arise from a mismatch between the sending and receiving software, and show how to avoid them.

### Fancy Text

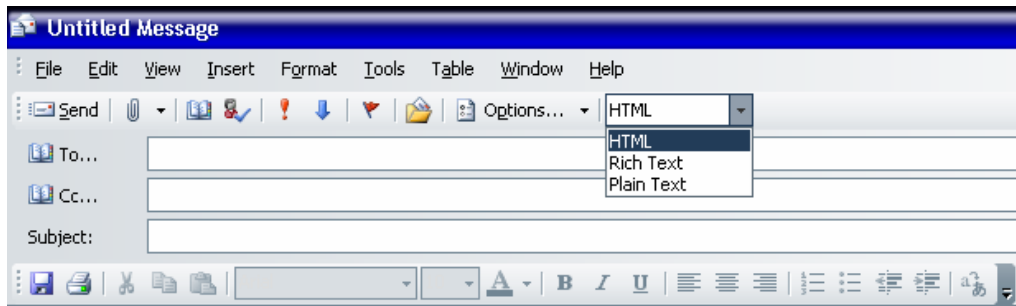
Some email reading software only understands plain text. Italics, bold, and colour changes will show up as codes in the text. You might send something like:

Hiya! I *loved* the presentation you gave to Jack this morning. **Great Job!**

But if your correspondent's software can't handle formatting, the message could show up as:

```
Hiya! I <i>loved</i> the presentation you gave to  
Jack this morning. <b>Great Job!</b>
```

Web documents are particularly difficult to read with older email programs. You may have a choice of sending the web page as text or as HTML; keep your correspondent's capabilities in mind when you make that choice. Often the most suitable method is to always send in plain text.



### Selecting plain text for emails can solve compatibility issues between different software applications.

#### Web Links

Some email reading software will recognise URLs (Uniform Resource Locators, or web addresses) in the text and make them clickable. While some software recognises URLs from the 'www.', most software recognises URLs by the `http://` at the front. Thus, if there is a URL in your email, it is much safer to include the `http://`. You should also be careful about punctuation - especially full stops - right after a URL. For example, take the message:

"Hi - The URL is `http://www.yahoo.com/`. See if you like it!"

The software on the receiving end may think that that last full stop after the URL is **part** of the URL. Or, if the software doesn't recognise links, the reader may cut-and-paste too much. Either has the potential to lead to an ugly email exchange, with your correspondent insisting that the page doesn't exist and you insisting that it does.

#### Attachments

Some mail software supports 'attachments', where you can specify a document to send through email. This allows people to share essentially any file in any format. GIF-encoded images, JPEG-encoded images, Word documents, WordPerfect documents, Photoshop files, Excel spreadsheets, and executable files are just a few of the types of documents that can be sent.

If your correspondent has a mail reader that can handle attachments, this can work very well: a long attachment can be looked at later. However, if your correspondent's email software doesn't understand attachments and you send a non-text file (like a Word document, a binary, a picture, or even compressed text), be advised that it will appear as lots of garbage. If the attachment is large it may be hundreds of pages long!

Even if your correspondent has email software that understands what attachments are, they still have to have software to read the document. Think of it this way: somebody can use the Post Office to send you any kind of document. Even executable programs can't always be useful to your correspondent. Macintosh programs won't run on Microsoft Windows machines; Windows XP programs may not run on machines that only have Windows 95 installed.

Furthermore, even if your correspondents can receive and view the attachment you send them, if they are low on disk space or dial in from home to get their email, they will *not* be happy to receive a 200MB video, no matter how funny it is.

It almost always better to post large documents on the Web and email the URL instead of the file. If you don't have that option, email your correspondents first and ask them if they can handle a large attachment of that format.

Words on a computer screen look different than on paper, and usually people find it harder to read things on a screen than on paper. (I know several people who even print out their emails to read them.) The screen's resolution is not as good as papers, there is sometimes flicker, the font may be smaller, and/or the font may be ugly. Your recipient's email reader may also impose some constraints upon the formatting of the mail, and may not have the same capabilities as your email software. This means that good email page layout is different from good paper document page layout.

### **Shorter Paragraphs**

Frequently email messages will be read in a document window with scrollbars. While scrollbars are nice, it makes it harder to visually track long paragraphs. Consider breaking up your paragraphs to only a few sentences apiece.

### **Being Concise**

How many times when you were in school were you told to write a 2000 word essay? Probably a lot and you got penalised for being too short. This training is not appropriate for email. Always keep it short. If they want more information, they can ask for it. (Also note that some of your correspondents may be charged by the kilobyte and/or have limits on how much disk space their email can use!) If you are sending a report to many people, then you may need to put more detail into the email so that you aren't flooded with questions from everyone on the recipient list. (You should also ask yourself carefully if all the people really need to be on the list.)

The fewer the people there are on the recipient list, the shorter the message should be. Books to thousands of people are tens of thousands of words long. Speeches in front of large groups are thousands of words long. But you'd tune out someone at a party who said more than a hundred words at a time.

Every new medium develops its own protocols for opening and closing. Telephone conversations start with 'Hello' and end with 'Goodbye'. Letters open with 'Dear' and end with 'Sincerely'. Because email is so new, there aren't firm customs on how to open and close.

Many people do not give either a salutation or a signature. After all, while a letter can get separated from its envelope easily, it is difficult to separate an email message's body from its addressing information. The email message itself says who it is to and from.

However, that information might not be adequate for your needs. It might be difficult to find with some email reading software. It might be unclear or ambiguous. It might be inadequate for telling the receivers just why they are getting that message. Or, it might not convey the proper formality or status cues for your purposes.

### **Salutations**

Salutations are tricky, especially if you are crossing cultures. Frequently, titles are different for men and women, and you may not be able to tell which you are addressing. The family name is first in some cultures and last in others. The honorific may vary based on status or age. So don't feel bad if you have trouble figuring out which salutation to use, it is a difficult problem.

It is a bad idea to use 'Sir' or 'Mr' unless you are absolutely certain that your correspondent is male. Similarly, it is probably safer to use 'Ms' instead of 'Miss' or 'Mrs' unless you know the preference of the woman in question.

Using someone's first name is *usually* okay. Thus, you can usually get away with a 'Dear' and the first name.

*'Dear Chris:'*

Here you are covered regardless of whether Chris is male or female. If you are addressing a group of people, you can say 'Dear' plus the title. For example:

**'Dear Project Managers:'**

### Signatures

Many email programs allow you to set up a default signature to be included at the end of every message. Many people use these signatures as an easy way to give their name and alternate ways of reaching them. For example:

'Hi - when did you want to go to lunch?'

Rebecca Jackson  
Jackson & Jackson.  
1210 Any Street  
Anytown, Anystate  
[Rebecca@jacksonandjackson.com.au](mailto:Rebecca@jacksonandjackson.com.au)

Such an extensive amount of signature information in contrast to such a short question can sometimes look odd. The name is perfectly reasonable to include, especially if

- Your email messages don't include your full name in the *From:* line. (Send yourself email to see if your name is there or not.)
- The name in the '*From:*' line doesn't match the name you actually use. (Christina might actually go by Chris, but her company might insist on using her full name as her email name.)
- The email account is shared by multiple people.

The telephone number is also a reasonable thing to include - if you are willing to be interrupted by a phone call. If the message is business related, including the company name is a reasonable thing to do - even if the message is going to someone else in the same company.

One thing that is missing from the above signature is her job title. Is she the vice-president of sales or the shipping clerk? That may have more of an influence on the correspondent than anything else.

### Spelling

Outlook® and most other email applications offer the facility to check your spelling and grammar before being sent. Always ensure you take this opportunity. Even though email is often seen as less formal than letter or memos, you should always check your message for spelling errors to ensure that your letter looks and sounds professional. You can run a spell check by selecting Tools -> Spelling or by pressing the F7 key.

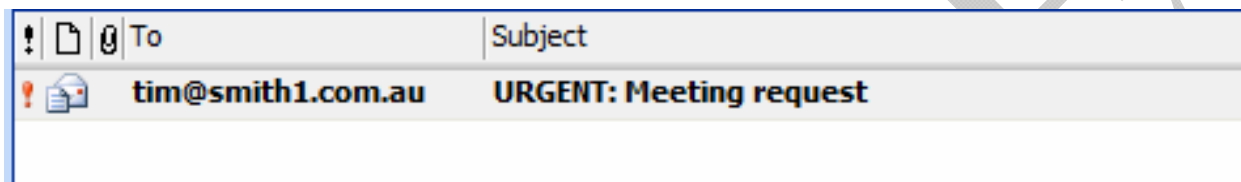


## Identifying Different Types of Email

Email comes in many forms, some good, some bad, some public, some private. The key to dealing with your email safely is to know what types of email you have received and knowing how to deal with them in an effective manner. In this section we will look at the various forms of email and the best way of dealing with these.

### Urgent Email

Whenever you send an email that needs urgent attention, there are various ways you can accomplish this. The most common method is to mark your email as “high importance”. This makes the email stand out in the inbox. Here you can see an example of an important email in Microsoft Outlook®. To further make this message stand out, the sender has used the header prefix URGENT: before the subject, to help it stand out.



Generally speaking, any message marked as urgent should be quickly scanned, and if the message is truly important, it should be dealt with as soon as possible. You can mark messages “high Importance” by clicking the red exclamation point button in Outlook®.

### Confidential Email

There is no simple way of identifying an email as confidential. However, you may find that the message subject is marked with CONFIDENTIAL: before the subject. Many organisations ensure a message must be treated as private and/or confidential by placing text similar to this at the end of any email message sent:

*The information contained in this Internet Email message is intended for the addressee only and may contain privileged information, but not necessarily the official views or opinions of organisation name. If you are not the intended recipient you must not use, disclose, copy or distribute this message or the information in it. If you have received this message in error, please Email or telephone the sender immediately.*

Treat these emails as private and ensure that the information contained within them is not forwarded on to those not authorised to receive it.

### Personal Emails

Generally speaking, it is best not to send personal emails from work, especially using your work email address. Different organisations have different policies on this, but most prefer that personal emails are not sent or received. All messages into and out of an organisation may be read or stored, so sending personal emails, forwarding jokes and the like may not be a good idea. The best rule of thumb when dealing with personal emails sent to or from a work address is to think, would I mind my manager reading this because potentially, they may).

### Dangerous or Suspicious Emails

The internet can be a dangerous place, and it can cause harm to your computer through various types of viruses and malware. Some basic rules when dealing with emails at work are:

- If an email looks suspicious, it probably is.
- If you do not recognise the sender, ignore and/or delete it.
- Never reply to suspicious emails.
- Never forward suspicious emails to others.
- Never send sensitive, personal or confidential information via email.
- Never click links in suspicious emails.
- Never click or download attachments in suspicious emails.

Generally speaking, the best rule when dealing with an unknown and suspicious email is to simply delete it. Only open attachments from those you trust, and where possible, save rather than open attachments and then run the file through a virus checker just to be safe. Your IT department should be able to assist you in dealing with emails you are not sure about.

SAMPLE



**Activity Two**

Identify the email application that you use, and then, using help files or asking others identify the way in which you would:

- Mark a mail as urgent.
- Mark an email as confidential.
- Delete an email without opening it.
- Save an attachment.

Handwritten student response area with horizontal lines and a large 'SAMPLE' watermark.

## Dealing with Returned Emails

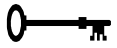
Unfortunately, email is not infallible, and sometimes an email you think should be sent will be returned to you. Here are a few tips for dealing with these types of emails.

- Contact the person you're trying to mail by other means. They may not know they are bouncing mail.
- Keep the returned message. It can help our tech support staff solve the problem quickly. It also (usually) contains the original message, which you may need to resend after the problem is fixed.
- Try to send yourself a test message if someone tells you your email account is bouncing mail. If possible, use an email account from a different domain than the account you are trying to test.
- Do not respond to the bounce message; it will rarely yield any results.
- Try not to continue trying to mail users after 2 or 3 tries (for permanent errors) or a week (for temporary errors).
- Don't assume that just because you can send a message to yourself that everyone else can. Email that does not leave your domain is usually handled differently than email that originates externally.

In the bounced email you will receive an SMTP error code, which states the reason for the message being bounced back to you. There are a range of error codes and the most common are:

- 421 Service not available, closing transmission channel (This may be a reply to any command if the service knows it must shut down).
- 450 Requested mail action not taken: mailbox unavailable (for example mailbox busy).
- 500 Syntax error, command unrecognized (This may include errors such as command line too long).
- 550 Requested action not taken: mailbox unavailable (for example the mailbox was not found, or there is no way to access it).

Any error that begins in a 4 means that the error is temporary. In these cases, the mail server will automatically try redelivering the messages after a predetermined amount of time. Errors beginning in a 5 are permanent errors and the server will not attempt redelivery.



### Key Points Section 1

- Email is a form of electronic messaging.
- Common applications include: Outlook®, Windows Live Mail, Mail and Thunderbird.
- Do not send any email from work that you would mind your managers reading.
- Confidential mail should be treated in a confidential manner.
- Delete any suspicious emails without opening them.
- Sometimes email will not be delivered properly, in these cases check the error message for a code to determine why the message was not delivered.

SAMPLED

**Section 1 - 'True' or 'False' Quiz**

<b>T</b>	<b>F</b>	Email is short for electronic mail.
----------	----------	-------------------------------------



<b>T</b>	<b>F</b>	Mail is included on the MacOS.
----------	----------	--------------------------------



<b>T</b>	<b>F</b>	Windows Live Mail is included as part of the Office suite.
----------	----------	--



<b>T</b>	<b>F</b>	Emails should be as concise as possible.
----------	----------	--



<b>T</b>	<b>F</b>	Email always looks the same on all computers.
----------	----------	---



<b>T</b>	<b>F</b>	Sending a message as plain text can eliminate any compatibility problems.
----------	----------	---



<b>T</b>	<b>F</b>	Signatures should be as long as possible.
----------	----------	---



<b>T</b>	<b>F</b>	Urgent mail will be marked with a paperclip.
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<b>T</b>	<b>F</b>	You should never download a suspicious attachment from someone you do not know.
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<b>T</b>	<b>F</b>	Error 420 is a permanent delivery error.
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