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OCCUPATIONAL STANDARDS

Assistant, Level 6

Occupational Standards are documents that describe the work, and a set of skills, knowledge and attitudes or competency requirements for successful performance of the work.

Uses of the professional standards

- 1) Compilation of curricula and training programs meeting the requirements of the labor market;
- 2) Assessment of people's competencies, including self-assessment and assessment of conformity on awarding of a profession;
- 3) Description and presentation of the occupations;
- 4) Career planning and laying the foundations for lifelong learning;
- 5) Identification of training needs and planning thereof;
- 6) Preparation of job descriptions and recruitment of employees;
- 7) A comparison of occupations and qualifications.

Title of the occupational qualification	Estonian Qualifications Framework (EQF) level
<i>Assistant, Level 6</i>	<i>6</i>



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Part A

DESCRIPTION OF WORK

A.1 Description of Work

The assistant is involved in the management activities of the organization. He or she organizes the exchange of information in the organization, services domestic and foreign customers, organizes document and archive management based on the organization's objectives.

His or her work tasks depend on the organization and assume independence, customer friendliness, rapid and flexible action, ensuring the confidentiality of information, coping with different, cultures, people and situations. The assistant can also be the office manager and a representative of the organization.

The knowledge, skills and attitudes of the assistant, affect the organization's reputation.

A.2 Work units

MANDATORY WORK UNITS

- A.2.1 Documentation
- A.2.2 Organization of records management
- A.2.3 Working with document management system(s) (DMS)
- A.2.4 Organization of archival work
- A.2.5 Internal communication
- A.2.6 Counseling on records management issues

OPTIONAL WORK UNITS

- A.2.7 Project management
- A.2.8 Graphic design and calligraphy
- A.2.9 Technical organization of personnel work
- A.2.10 Technical assistance of accounting
- A.2.11 Technical organization of sales and marketing
- A.2.12 Organization of work with the documents in need of preservation
- A.2.13 Travel arrangement

The list of work tasks related to work units is provided in Annex 1 "Work units and work tasks".

A.3 Working environment and the specificity of the work

In general, the work time of the assistant is fixed. The work pace can be both alternating and routine and contain various tasks. Assistants work indoors. The work may involve physical effort and a forced position, which can cause a variety of adverse health effects.

A.4 Work equipment

Office, presentation, and communication equipment.

A.5 Personal characteristics necessary for the work: aptitude and personality traits

- 1) Initiative
- 2) Empathy
- 3) Self-management ability
- 4) Good oral and written communication skills
- 5) The ability to establish oneself



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- 6) Adaptability
- 7) A sense of commitment and responsibility
- 8) Logical and analytical skills
- 9) System cognition, correctness
- 10) Poise
- 11) Tolerance
- 12) Reliability
- 13) Cooperation skills
- 14) Stress tolerance

A.6 Professional training

Requirements for applying for the occupational qualification of assistant level 6:

- a) Successful completion of professional higher education meeting the requirements of the occupational standards or Bachelor's studies; or,
- b) Higher education (or equivalent education) and at least two years of professional experience in administrative work; or,
- c) Completion of professional continuing education and a minimum of four years of professional experience in administrative work.

A.7 The most common job titles

Administration assistant, Senior administrative specialist, Assistant, Office assistant, Office manager, Assistant to the manager, Record manager, Assistant, Assistant - office assistant, Assistant-administrative specialist, Head of the office, Assistant adviser, Senior assistant adviser, etc.



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Part B COMPETENCY REQUIREMENTS

B.1. Structure of the occupational qualification

The occupational standard of assistant, Level 6, describes 6 mandatory, 6 optional competencies and transferal competencies.

Upon application for this occupational qualification, certification of mandatory competencies B.2.1-B.2.6 and transferal competency B.2.14 and the option to select and certify at least three additional competencies (the optional competencies B.2.7 - B.2.13) are required.

B.2 Competencies

MANDATORY COMPETENCIES

B.2.1 Documentation

ECT Level 6

Performance indicators

- 1) Prepares substantively, linguistically and technically, documents according to the given requirements on the basis of good practice*, creates, and prepares documents for the given instructions - document templates (letter templates, etc.), and formalizes the documents prepared by others;
- 2) Directs the documents for processing according to the need of the execution task through different channels (fax, mail, e-mail, etc.) and, if necessary, prepares procedure circles and directs documents for processing;
- 3) Make copies and extracts of documents, prepares certificates and executes formal notations concerning certification in accordance with the needs and competencies;
- 4) Collects, describes and preserves, different types of documents (web site, media, photos, company graphics, memorabilia, souvenirs, sound recordings, etc.), based on the specific nature of the organization and on a well-established tradition;
- 5) Creates information (including the formation of databases) management systems according to the needs of information seeking process and organizational needs.

Knowledge:

- 1) Principles of document layout;
- 2) Principles of documentation.

Assessment method(s):

Practical work.

B.2.2 Organization of records management

ECT Level 6

Performance indicators

- 1) Defines the needs of the document systems of the organization in accordance with the law;
- 2) Prepares and/or supplements the organization's records management procedure, according to law and the organization's needs;
- 3) Defines the system of classification of documents of the organization, coordinates and/or draws up a list of documents, amends and improves it according to suggestions and needs;
- 4) Participates in the development of the procedures governing the life cycle of documents and coordinates the life cycle of documents in accordance with the procedure established by the organization;
- 5) Decides on the need of the inclusion, forwarding, or destruction of documents, according to the needs and the established procedures;
- 6) Develops the requirements for inclusion and registration of documents and coordinates the registration of documents according to established procedures;
- 7) Follows the restrictions on access to documents and makes proposals to restrict access in accordance



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with the law and the needs of the organization;
8) Monitors the performance dates of documents, prepares reminders and summaries of the performance of documents according to established procedures.

Knowledge:

- 1) Legislation (laws and regulations) governing records and archive management;
- 2) Standards of the field.

Assessment method(s):

Test and/or practical work.

B.2.3 Working with document management system(s) (DMS)

ECT Level 6

Performance indicators

- 1) Coordinates the acquisition, deployment and development of DMS in accordance with the organization's needs and makes suggestions to improve the system;
- 2) Coordinates the changes to the work processes of DMS, makes suggestions and participates in the change of work processes.

Knowledge:

- 1) DMS

Assessment method(s):

Test and/or practical work.

B.2.4 Organization of archival work

ECT Level 6

Performance indicators

- 1) Coordinates the preparation of documents (files, series) for handing over to the archive in accordance with legislation, guidelines and procedures established by the organization;
- 2) Draws up a list of records in accordance with the needs of the organization and uses it to search for documents;
- 3) Follows the document retention requirements in accordance with the established procedures and, if necessary, makes proposals to amend the requirements;
- 4) Registers the rentable documents (files), issues copies of the documents and makes extracts according to the procedure established by the organization;
- 5) Ensures the proper disposal of records according to established procedures;
- 6) Under the guidance of a representative of an archival authority coordinates and organizes handing over of records to the archival authority.

Knowledge:

- 1) Handing over of documents to the archive;
- 2) Principles of preparing the list of records;
- 3) Document retention requirements;
- 4) Document destruction principles.

Assessment method(s):

Test and/or practical work.

B.2.5 Internal communication

ECT Level 6

Performance indicators

- 1) Draws up substantially, formally and grammatically correct written messages, selecting the appropriate communication channel for transmission of the message;
- 2) Participates in the formation of the culture of the organization based on the needs of the organization;
- 3) Makes suggestions for improving internal communication and information flow according to the needs;



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- 4) Is responsible for access to information of his or her field in accordance with the procedures established in the organization;
5) Organizes events according to the mandate and to the organization's needs.

Knowledge:

- 1) Bases of the organizational culture;
- 2) Bases of public relations.

Assessment method(s):

Practical work and certification with documents.

B.2.6 Counseling on records management issues

ECT Level 6

Performance indicators

- 1) Advises colleagues on the basis of legislation and of the procedure established in the organization, (documentation, document management organization, use of DMS, organization of archival work, etc.);
- 2) Organizes DMS training for end users according to the organization's needs and advises users of the system in future work;
- 3) Identifies other records of management training needs of the organization, prepares a training plan in coordination with management, based on the organization's needs;
- 4) If necessary develops training materials, and carries out training(s) and makes summaries (assesses the performance of the objectives).

Knowledge:

- 1) Legislation (laws and regulations) governing records and archive management;
- 2) Standards of the field;
- 3) Procedures of document layout;
- 4) Fundamentals for conducting training.

Assessment method(s):

Practical work and certification with documents.

OPTIONAL COMPETENCIES

B.2.7 Project management

ECT Level 5

Performance indicators

- 1) Identifies the objective of a specific project within his or her area of responsibility and competence, based on the organization's needs;
- 2) Plans the project plan, including a timetable, on the basis of the objective of the project and the needs of the organization;
- 3) If necessary, draws up a calculation and risk assessment, based on the volume and the purpose of the project;
- 4) Leads and if necessary, coordinates the project work, according to the volume and the purpose of the project;
- 5) Prepares a summary based on the purpose of the project.

Knowledge:

- 1) Foundations of project management and quality management;
- 2) Foundations of quality management.

Assessment method(s):

Solving of a situation task.

B.2.8 Graphic design and calligraphy

ECT Level 5

Performance indicators

- 1) Designs web pages with the help of simpler design programs according to the needs of the organization;
- 2) Writes by hand and on the computer, using a variety of calligraphy styles.



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Knowledge:

- 1) Design programs and writing instruments;
- 2) Calligraphy styles and techniques.

Assessment method(s):

Practical work and certification with documents.

B.2.9 Technical organization of personnel work

ECT Level 6

Performance indicators

Personnel records and administration of work relations

- 1) Draws up documents of commencement, continuation and termination of work relations in accordance with the law;
- 2) Complies with the requirements of confidentiality of personal data;
- 3) Maintains personnel records properly;
- 4) Manages the personnel database (employee personal data, salary data, etc.) in accordance with the procedure established by the organization.

Workforce planning and analysis of work

- 1) Makes queries from the personnel database and makes summaries (number of employees, number of sick days, days of training, etc.), on the basis of the given orders;
- 2) Prepares job descriptions on the basis of a given methodology in accordance with the needs of the organization.

Recruitment and selection

- 1) Prepares a job offer in accordance with the needs of the organization;
- 2) Publishes job offers in the relevant channels according to the needs;
- 3) If necessary, arranges for the election of a new employee in accordance with the orders and instructions and participates in the evaluation of the candidates;
- 4) If necessary, arranges for the supervision of the new employee in accordance with the needs of the organization.

Development and training of employees

- 1) Analyzes the trainings completed by employees and makes suggestions to the management about additional training, based on the needs of the organization;
- 2) Participates in the preparation of a training plan and budget according to the instructions;
- 3) Orders and arranges training according to needs;
- 4) Examines training feedback, makes a summary analyzing the effectiveness of the training.

Internal communication and management of intra-organizational relations

- 1) Draws up substantially, formally and grammatically correct written messages, selecting the appropriate communication channel for transmission of the messages;
- 2) Participates in the formation of the culture of the organization and in the organization of joint events.

Knowledge:

- 1) Foundations of personnel work;
- 2) Laws governing preparing and retention of documents;
- 3) Labor law regulations;
- 4) Bases of public relations;
- 5) Personnel databases.

Assessment method(s):

Practical work.

B.2.10 Technical assistance of accounting

ECT Level 5

Performance indicators

- 1) Organizes and checks the accounting records in accordance with established guidelines;
- 2) Participates in the organization of document storage and archiving, in accordance with the



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established procedures;

3) Participates in conducting inventories and draws up inventory documents on paper and the computer by entering the data into the relevant programs, in accordance with the established procedure;

4) Prepares primary and summary documents of accounting in accordance with the established procedures, by preparing documents in both paper and electronic environment;

5) Enters the data into the relevant programs, in accordance with the established procedures;

6) Is involved in preparation and checking of financial accounting registers and reports, in accordance with the established procedures;

7) If necessary, submits the prepared reports into e- commercial register, eSTAT or other electronic systems, in accordance with the established procedures;

8) Takes into account the working hours and fees according to the given instructions and the salary management system.

Knowledge:

1) Accounting theory and basic concepts;

2) Legislation (laws and regulations) governing the field;

3) Accounting on the computer and accounting computer programs;

4) Working hours and wages calculation bases;

5) Bases of taxation;

6) The foundations of preparation of the basic financial statements.

Assessment methods:

Practical work.

B.2.11 Technical organization of sales and marketing

ECT Level 5

Performance indicators

1) Participates in the definition of client groups, taking into account the service, product, and organizational needs;

2) If necessary, participates in the setting of prices for products/services based on pricing principles;

3) Prepares a promotional message, based on the advertising channel and the target group, based on the guidelines;

4) Uses different advertising channels in accordance with the organization's needs for advertising products/services;

5) Plans sales, using the appropriate sales channels (e.g., relational networks, client meetings, etc.), introduces the sales object based on the client's and the organization's needs;

6) Uses a variety of ways of selling and plans additional sales.

Knowledge:

1) Bases of marketing;

2) Legislation of the field (Advertising Act);

3) Advertising principles (organization of advertising);

4) Principles of organization of commerce;

5) Bases of logistics;

6) Principles of pricing of products;

7) Market research methods.

Assessment methods:

Practical work.

B.2.12 Organization of work with stored documents

**ECT Level
5**

Performance indicators

Delivery and acceptance of documents

1) Explains the needs of the structural units of the organization for transfer of documents to the archive

of the organization, taking into account the annual increment of documents and draws up a timetable for receipt thereof;

2) Plans transfer of records to a public archive, seeking to obtain money for acquisition of accessories and prepares transfer applications, taking into account the quantities and dimensions of the different format transferred documents to obtain the accessories necessary for storage;

3) Organizes and describes the records for the transfer to the public archives, taking into account the appraisal decisions given by the public archives, and the transfer requirements provided in the archival regulations and explained in the instructions of the public archive;

4) Checks the quantities of the transferred files from the units on the basis of the transfer lists and the number of files to be transferred to the public archive on the basis of the lists before the transfer;

5) Checks the organization of the files transferred from the units and the compliance with the description of the provisions of the records management rules of the organization;

6) Checks the compliance of the formats of digital records to be transferred to the public archive with the requirements set out in the archival rules and arranges for the elimination of deficiencies;

7) Documents reception of the files from the units with the instrument of reception, according to the organization's records management procedures, and notes the new location of the files in the records;

8) Organizes the signing of the instrument of delivery and receipt sent by the archive in accordance with the requirements.

Organization of the documents

Documents on paper:

1) Forms the documents into archival documents on the basis of the conservation value, if necessary, removes the metal fittings, systematises the documents within the archival documents, numbers the pages, formalizes the authenticating letter and the cover of the archival document, in accordance with the requirements;

2) Uses the archival accessories in accordance with the value document, depending on the term of retention and archival value.

Digital documents:

3) Identifies the file formats used and stores archive valuable documents meant for long-term preservation in the archival formats in accordance with the archival rules.

Destruction of documents

1) Follows the retention periods set for a series in accordance with the list of organization's documents;

2) Upon the expiry of the retention period prepares the documents for destruction and separates the files for destruction;

3) Documents the destruction operations in accordance with the requirements of the legislation.

The use and an overview of documents

1) Arranges the use of the documents subject to retention;

2) Keeps record of the archive in accordance with the list of documents.

Knowledge:

1) Principles of records and archive management;

2) Delivery and receipt of documents;

3) Document destruction principles;

4) Archive organizing principles.

Assessment methods:

Practical work or test.

B.2.13 Travel arrangements

ECT Level 5

Performance indicators

1) Performs official trip tasks (travel planning, making appointments, booking and buying of hotels and airline tickets, visa applications, etc.) according to instructions and to the cultural contexts of the



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destination;
2) Completes and submits official trip reports according to the requirements established by the organization.

Knowledge:

- 1) The nature of a tourism product (accommodation, insurance, transportation, visas, etc.);
- 2) Cultural differences.

Assessment methods:

Practical work.

TRANSFERAL COMPETENCIES

B.2.14 Transferal competencies of Assistant, Level 6

ECT Level 6

- 1) Applies the principles of customer service in communication with domestic and foreign customers, customers with special needs and different cultural backgrounds, following in his or her daily work the organization's value judgments in accordance with the existing situation, both in direct communication as well as in different means of communication (telephone, skype, etc.);
- 2) If necessary, represents the organization on the order of the manager (presentations, expressions of gratitude, condolences, congratulations, etc.);
- 3) If necessary, arranges professional meetings and negotiations, and the associated official trips and visits in accordance with the instructions;
- 4) Is responsible for the organization of translation works;
- 5) Prepares formal invitations, thank-you letters, etc.;
- 6) Orders gifts with the insignia of the organization;
- 7) Advises co-workers in protocol issues;
- 8) Uses in her or his work the computer on the level AO7-AO1 (including computer typing);
- 9) Identifies the organization's needs and arranges for procurement of suitable office and presentation equipment and arranges for equipment maintenance;
- 10) Prudently uses office equipment (copiers, scanners, printers, presentation equipment, fax machines, etc.), if necessary, assists and supervises co-workers;
- 11) Orders and issues office supplies in accordance with the procedures established by the organization, participates in the preparation of the budget and in the selection of a suitable provider;
- 12) Uses official language correctly on level C2;
- 13) Uses two foreign languages (preferably English and Russian) at level B2;
- 14) Participates in the assurance of the welfare facilities necessary for the successful operation of the organization (occupational health and safety, including ergonomics, stress at work, first aid, environment conservation, etc.) in accordance with the established requirements;
- 15) Participates in the organization of the work environment, and property management (repairs, reconstructions), as appropriate;
- 16) Is guided in his or her work by the Code of Ethics of the secretarial work "Handbook of Codes of Ethics;"
- 17) Constantly improves his or her horizons (including news of the day), and specialist knowledge.

Knowledge:

- 1) Bases of team work;
- 2) Communication techniques and basics of communication;
- 3) Basics of service culture;
- 4) Definition and nature of service;
- 5) The nature of the role of the servicer;
- 6) Protocol and etiquette;
- 7) Knowledge of the society (economics, culture, politics, law, etc.);
- 8) Basics of contract law;



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- 9) Legal grounds of working;
- 10) Basics of archival work;
- 11) Basics of economics;
- 12) Basics of psychology;
- 13) Cultural and political differences.

Assessment method(s):

Transferal competencies are assessed in an integrated way in the course of the assessment of other competencies provided in the occupational standard.



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Part C

GENERAL INFORMATION AND ANNEXES

C.1 Information for preparation and approval of the occupational standard and on the awarding body and a reference to the location of the occupational standard in the classifications	
1. The marking of the occupational standard in the occupational qualification register	14-07062012-06/4k
2. Occupational qualification standard prepared by:	Andres Hurt, PricewaterhouseCoopers Anne Ilp, Tallinn School of Economics Anu Moosel, SA Innove Irina Ojala, Elion Enterprises Ltd. Janne Kerdo, The Estonian Assistants Society Sirje Orvet, The Estonian Assistants Society
3. Occupational qualification standard approved by	Professional Council of Business Service and Other Business Activities
4. Professional Council Decision No.	10
5. Date of Professional Council Decision.	07.06.2012
6. Occupational standard valid until	06.06.2017
7. Occupational standard version number (1-n)	4
8. Reference to the Classification of Occupations (ISCO 08) (<i>min 2, max 4 digits</i>)	According to Classification of Occupations ¹ , Assistant belongs to the 3rd main group "Technicians and mid-level specialists", code 33.
9. Reference to the European Qualifications Framework (EQF)	6
C.2 Occupational title in a foreign language	
English: assistant	
Russian: ассистент руководителя	
Finnish: assistentti	
C.3 Annexes	
Annex 1 Work units and work tasks Annex 2 Computer skills Annex 3 Language skill levels descriptions	

Work units and work tasks
Annex 1

Work units and work tasks	Secretary, Level 5	Assistant, Level 6
1. Documentation		
1.1 Creation of documents	X	X
1.2 Transmission of a document, giving and performing of document-related tasks	X	X
1.3 Making copies and extracts of documents, formal confirmation	X	X
1.4 Inclusion of different types of documents	X	X
1.5 Management, systematization and storage of information	X	X
2. Organization of document management		
2.1 Creation of records management procedures	X	X
2.2 Preparation/amendment of the list of documents	X	X
2.3 Determination of the management of the life cycle of documents	X	X
2.4 The inclusion and registration of documents	X	X
2.5 Determination of the restrictions on access to documents	X	X
2.6 Checking of timely execution of documents	X	X
3. Working with document management system(s) (DMS)		
3.1 Implementation of the DHS	X	X
3.2 Changing the document management processes	X	X
4. Organization of archival work		
4.1 Preparation of the archive for organization	X	X
4.2 Description of documents	X	X
4.3 Retention of documents	X	X
4.4 Use of documents	X	X
4.4 Organization of monitoring of the retention period and the destruction	X	X
4.5 Organization of transfer of documents to the archival agency	X	X
5. Internal Communication		
5.1 Preparation and transmission of messages	X	X
5.2 Participation in the shaping of organizational culture	X	X
6. Counseling on records management issues		
6.1 Coordination of trainings	X	X
6.2 Counseling on records management issues	X	X
OPTIONAL COMPETENCIES		
7. Project management		
7.1 Determination of the need for the project	X	X
7.2 Coordination of implementation of the project	X	X
8. Graphic design and calligraphy		



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8.1 Website design	X	X
8.2 Calligraphy	X	X
9. Technical organization of personnel work		
9.1. Personnel records and administration of work relations		
9.1.1 Management and retention of personnel records	X	X
9.1.2 Management of personnel databases	X	X
9.2 Workforce planning and analysis of work		
9.2.1 Collection, processing and analysis of the workforce of the organization	X	X
9.2.2 Preparation of job descriptions	X	X
9.3 Recruitment and selection		
9.3.1 Preparation and dissemination of job offers	X	X
9.3.2 Participation in the selection process	X	X
9.3.3 Arranging of adaptation of employees	X	X
9.4 Development and training of employees		
9.4.1 Identification of development and training needs	X	X
9.4.2 Preparation of the training plan and training budget	X	X
9.4.3 Ordering and arranging of trainings	X	X
9.4.4 Evaluation of the effectiveness of trainings	X	X
9.5 Internal communication and management of intra-organizational relations		
9.5.1 Preparation and transmission of written messages	X	X
9.5.2 Participation in shaping of organizational culture	X	X
10. Technical assistance of accounting		
10.1 Management of accounting documents	X	X
10.2 Technical organization of inventory	X	X
10.3 Financial accounting	X	X
10.4 Calculation of remuneration	X	X
11. Technical organization of sales and marketing		
11.1 Organization of E-commerce and retail trade	X	X
11.2 Organization of advertising	X	X
11.3 Carrying out the sales process	X	X
12. Organization of work with the documents in need of preservation		
12.1 Delivery and acceptance of documents		
12.1.1 Planning of collection of documents	X	X
12.1.2 Preparing for the transfer of records	X	X
12.1.3 Checking of the documents to be transferred	X	X
12.1.4 Documentation of delivery and receipt of documents	X	X
12.2 Organization of the documents		
12.2.1 The physical organization (different types and genres of documents)	X	X



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12.3 Destruction of documents		
12.3.1 Destruction of documents	X	X
12.4 Use of documents and having an overview thereof		
12.4.1 Use of documents	X	X
12.4.2 Having an overview of the archive	X	X
13. Travel arrangement		
13.1 Planning	X	X
13.2 Submission of reports	X	X
Transversal competencies	X	X