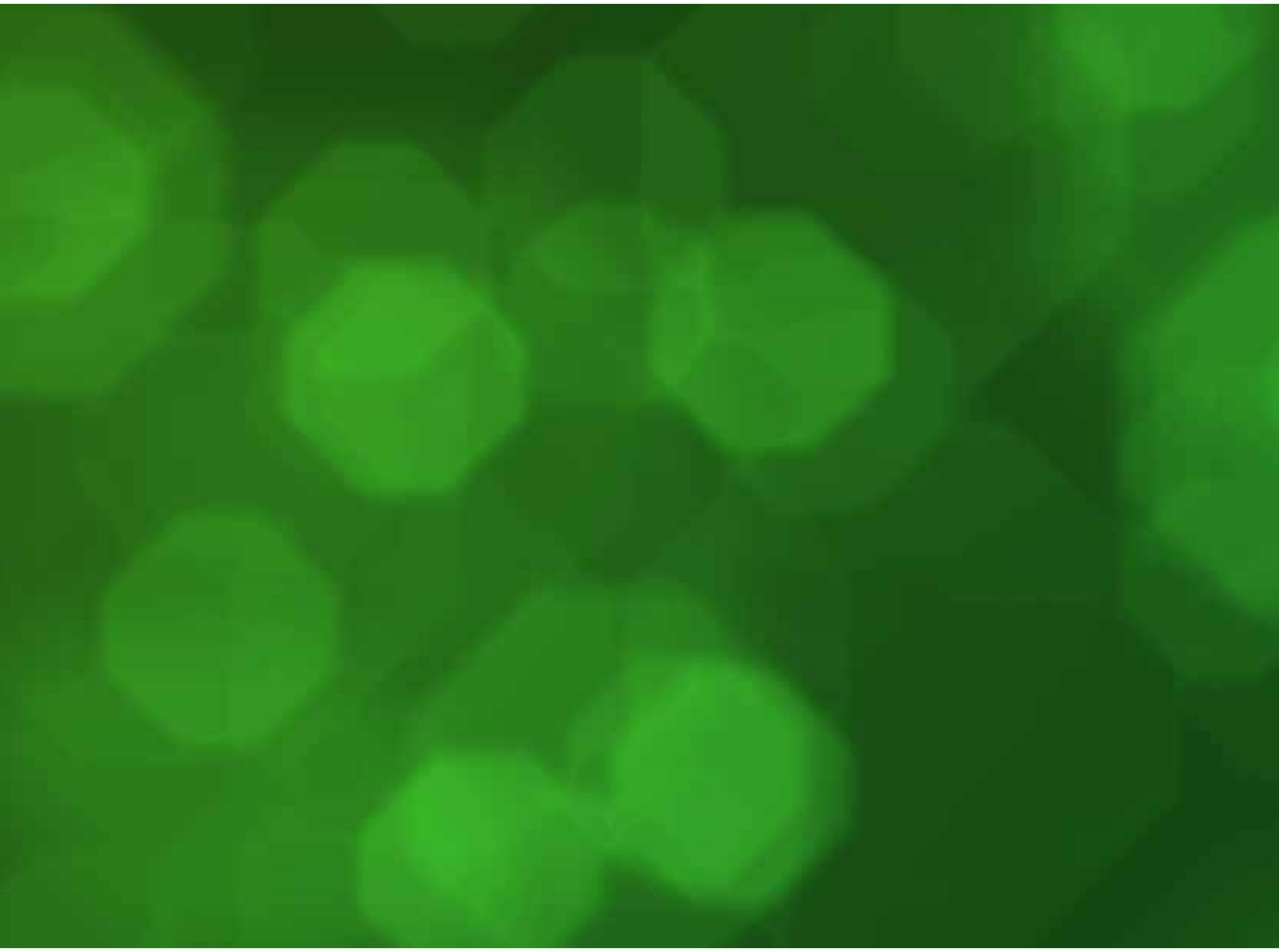
BSBINM301 Organise workplace information

Release 1



Learner guide

aspire learning resources

BSBINM301
Organise workplace information

Release 1

Learner guide

Aspire Version 1.1

learning resources

BSBINM301 Organise workplace information Release 1

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Contents

Before you begin

This learner guide is based on the unit of competency *BSBINM301 Organise workplace information*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: www.training.gov.au.

How to work through this learner guide

This learner guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the learner guide you need to read, and which practice tasks and learning checkpoints you need to complete. The features of this learner guide are detailed in the following table.

Feature of the learner guide	How you can use each feature
Learning content	Read each topic in this learner guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
Examples and case studies	Examples of completed documents that may be used in a workplace are included in this learner guide. You can use these examples as models to help you complete practice tasks, and learning checkpoints. Case studies highlight learning points and provide realistic examples of workplace situations.
Practice tasks	Practice tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
Video clips	Where QR codes appear, learners can use smartphones and other devices to access video clips relating to the content. For information about how to download a QR reader app or accessing video on your device, please visit our website: www.aspirelr.com.au/help
Summary	Key learning points are provided at the end of each topic.
Learning checkpoints	There is a learning checkpoint at the end of each topic. Your trainer will tell you which learning checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.

Foundation skills

As you complete learning using this guide, you will be developing the foundation skills relevant for this unit. Foundation skills are the language, literacy and numeracy (LLN) skills and the employability skills required for participation in modern workplaces and contemporary life.

The following table outlines specific foundation skills noted for your learning in this learner guide.

Foundation skill area	Foundation skill description
Reading	• Recognises and assesses textual information to complete tasks according to requirements
Writing	• Completes workplace records, forms and documentation accurately using correct format, accurate spelling and grammar and terminology specific to requirements
Oral communication	• Elicits the view and opinions of others and obtains information by listening and questioning • Participates in a verbal exchange of ideas/solutions using clear language to contribute information and convey issues
Navigate the world of work	• Understands rights and responsibilities and complies with explicit policies and procedures and legal and regulatory requirements
Interact with others	• Identifies and follows accepted communication practices and protocols • Complies with work instructions and contributes to work group discussions using accepted conventions
Get the work done	• Plans and implements routine tasks and workload making decisions about sequencing and timing • Makes low impact decisions within familiar situations, based on a range of predefined or routine solutions, and evaluates the effectiveness of the outcome • Uses digital technology to access and record information and to communicate with others

What do you already know?

Use the following table to identify what you may already know. This may assist you to work out what to focus on in your learning.

Topic	Key outcome	Rate your confidence in each section
Topic 1 Collect and assess information	1A Access product and service information	❑ Confident ❑ Basic understanding ❑ Not confident
	1B Use reliable methods to collect information efficiently	❑ Confident ❑ Basic understanding ❑ Not confident
	1C Assess information for clarity, accuracy, currency and relevance	❑ Confident ❑ Basic understanding ❑ Not confident
	1D Use interpersonal skills to access information from colleagues	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 2 Organise information	2A Organise information in a format suitable for analysis and dissemination	❑ Confident ❑ Basic understanding ❑ Not confident
	2B Use appropriate technology and systems to maintain information	❑ Confident ❑ Basic understanding ❑ Not confident
	2C Collate information and communicate it to relevant people	❑ Confident ❑ Basic understanding ❑ Not confident
	2D Identify difficulties with accessing information and work collaboratively to solve them	❑ Confident ❑ Basic understanding ❑ Not confident
	2E Update and store information	❑ Confident ❑ Basic understanding ❑ Not confident

Topic	Key outcome	Rate your confidence in each section
Topic 3 Review information needs	3A Actively seek feedback on clarity, accuracy and sufficiency of information	❑ Confident ❑ Basic understanding ❑ Not confident
	3B Review the contribution of information to decision-making and modify collection processes	❑ Confident ❑ Basic understanding ❑ Not confident
	3C Identify and document future information needs and modify collection and reporting processes	❑ Confident ❑ Basic understanding ❑ Not confident

Topic 1
Collect and assess information

Every day, organisations are exposed to an abundance of information they must manage, such as letters, emails, minutes of meetings, reports, journals, promotional material, newsletters, raw data, contracts, financial documents, customer and staff details, and operational plans. All of this is essential for the day-to-day operations and the continued growth and prosperity of the organisation. If this mass of information is to be used to benefit the organisation, collecting, analysing, storing and retrieving information must be managed efficiently through systems and processes.

In this topic you will learn how to:

1A Access product and service information

1B Use reliable methods to collect information efficiently

1C Assess information for clarity, accuracy, currency and relevance

1D Use interpersonal skills to access information from colleagues

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1A Access product and service information

The information an organisation handles usually includes hard-copy documents, such as correspondence; feedback and complaint forms; sales data; personnel records; financial figures and accounting data; sales, revenue and production targets; promotional material; newsletters and magazines. Staff also download information from the internet and receive emails and attachments electronically.

In addition, information is received from phone calls, meetings and informal discussions.

Information comes from external sources, such as customers, suppliers, consultants, other businesses, government departments, competitors and industry associations. Internal sources include colleagues, supervisors and managers, other teams and departments, other branches and members of boards and committees.

Types of information

The types of information held by an organisation depend on its industry, its business operations and its size.

Each organisation has its own way of storing and accessing information in line with its systems and policies. As you read the following categories of information, think about who would need to use these different types of information.

Types of information	
	**Correspondence** Correspondence includes incoming and outgoing emails, memos, faxes and letters, including letters to customers, quotes from suppliers, customer feedback, promotional letters accompanying products, letters of appreciation and customer queries. Check files frequently. Most organisations retain outgoing correspondence in their electronic files; these might be retained in the office for a number of years and then stored off-site. Electronic versions of correspondence may be archived.
	**Forms** Organisations have a range of forms relating to their particular business. They should all be stored in the appropriate file or department. Forms may include feedback forms, surveys, questionnaires, complaint forms, work health and safety incident forms, personnel forms, insurance forms and membership forms.

Operational reports, plans and documentation

Material related to business operations includes business plans, departmental strategic plans, risk management plans, budgets/finance plans, work plans, minutes of meetings, project reports, monthly statements, annual reports, board reports, evacuation procedures and policies, and procedures manuals. Some documents may be legal documents that must be prepared and sent to appropriate bodies. Copies of reports must be retained for reference and auditing purposes, and stored in a secure but accessible way.

Computer databases

Computer databases are an essential tool for businesses. They are important for storing information in one place, but this information can then be accessed to prepare reports to meet particular organisational requirements. All records must be regularly maintained and monitored. An example of a computer database is a customer database that records customer details, helps organisations keep track of current and lapsed clients, records interactions and highlights buying patterns.

Personnel records

Organisations keep records of all their staff including personal information such as addresses and telephone numbers, as well as details of salary levels, years of employment, leave accrued, time sheets, staff contracts, and details of performance appraisals and professional development. Access to this information is usually restricted. Personnel records may be stored in a limited-access electronic database (on a computer with access by password) or kept as secure and confidential paper files.

Promotional material

Organisations produce an array of promotional material for their products and services. They also regularly receive similar material from other organisations. This material must be kept up to date. Promotional material may include catalogues, brochures, flyers, newsletters, journals and magazines.

Types of information: financial information data

Outlined below are three examples of financial information data.

Sales records and invoices

Sales records include sales forecasts and records of targets achieved. Sales forecasts help organisations prepare short-term and long-term plans. Records are kept of all results in relation to sales targets. These may be updated through a database, spreadsheet or Microsoft Word file. Invoices record the sales transactions that an organisation makes. Invoices may be from suppliers or to debtors.

Financial figures and accounting information

Organisations store many types of financial documents. They include sales figures, tax information, accounting spreadsheets, invoices, payroll information, superannuation information, insurance records and lists of debtors. This information is regularly updated in accordance with standard practice.

Production targets

Information about production targets helps organisations plan for the production of goods. Sales staff also use production targets to estimate the amount of stock available to customers over a given period. Information on production targets should be regularly updated and distributed throughout the organisation. This is often accessible via the organisation's website or intranet.

Access information

Not all information is, or should be, accessible to all staff in an organisation. Individuals and departments are given access to the types or levels of information that they need to do their job. For example, the human resources department has access to salary information for all staff, but privacy laws and organisational policies prevent the customer service team from having access to this data. In addition, they do not need this information to do their jobs.

Be aware of the organisational requirements that guide access to information.

Access information: comply with conduct and ethics

A code of conduct or code of ethics is a set of standards outlining the behaviour that an organisation expects of all its staff. Many organisations provide their code of ethics on their website so that clients and potential staff understand the standards and values that are upheld by the organisation. An example of ethical conduct is to use information collected only for the purpose for which it is intended.

Below are some of the Australian Public Service (APS) Code of Conduct requirements.

Australian Public Service Code of Conduct requirements
Use Commonwealth resources in a proper manner and for a proper purpose.
Do not provide false or misleading information in response to a request for information made for official purposes in connection with the employee's APS employment.
Do not improperly use inside information or the employee's duties, status, power or authority to gain a benefit or advantage for the employee or any other person.

Access information: comply with protocols

Protocols are a set of rules or guidelines adopted by an organisation. They are more specific than a code of conduct or ethics, as they tell you what appropriate action to take in a certain situation or set of circumstances.

Access information: comply with policies, guidelines and requirements

A policy is a plan of action that guides the decisions an organisation makes. Organisational policy is designed to ensure that all areas of the organisation are working towards the same goal. A policy may be managerial, financial or administrative in nature. Guidelines and requirements are developed to help staff understand the preferred or essential actions to uphold the policy. Always follow the organisation's requirements when accessing information.

Access information: comply with management structure

Management structures differ depending on the size and type of organisation. Large organisations usually have a senior management team that includes a chief executive officer and other levels of management. Small organisations may have a general manager, or managers for different departments or areas of expertise. People in management positions have access to different levels of information depending on the responsibilities of their job and in turn they may control what information others have access to.

Access information: comply with work health and safety

Under work health and safety (WHS) legislation, an employer must provide safe premises, safe machinery and materials, and safe systems of work. This requires:

- information, instruction, training and supervision
- a suitable working environment and facilities
- appropriate safety aids.

In order to fulfil these requirements, all staff must have easy access to information, protective clothing and manual handling aids that guide them in the safe way to do their jobs.

Access information: comply with record updating procedures

In order to ensure that the documents and files staff use to do their jobs are up to date, organisations usually have a system in place to make sure that changes in policy, procedures or products are recorded efficiently. The procedures used will vary depending on the type of information stored and whether it is stored electronically (on the intranet, in databases or electronic files) or in paper or other form. Often records are stored in multiple locations or forms and checklists can be used to ensure the procedure is completed correctly.

Access information: comply with quality assurance

The term 'quality assurance' (QA) refers to the process by which an organisation ensures that its systems, products or services occur at the required standard.

This type of information is usually recorded in written form. Most organisations have quality assurance manuals that specify what staff need to do to meet the standards. QA information and instructions may also be given verbally by supervisors or colleagues, or in electronic format.

Access information: comply with security and confidentiality procedures

Security and confidentiality must be considered when deciding how to store and access information. Legislation, including the *Privacy Act 1988* (Cth), provides rules about how information can be handled and organisations must make sure that their procedures meet these requirements. Types of information that may have restricted access include personnel records (including salary levels), financial information, legal records, proposals and tenders, records of hiring decisions and meeting minutes.

Follow organisational and legislative requirements. For example, do not disclose information to people who are not authorised to use it; follow restricted access procedures; never leave confidential material lying around; seek permission to access confidential material when appropriate.

Security and confidentiality of information are usually controlled by restricting access to information by:

- passwords
- allocated levels of computer access
- segmenting of documents on shared computer servers
- written requests to access information
- locked filing cabinets
- limited lines of communication.

Access information: comply with anti-discrimination legislation

When gathering and organising workplace information, you need to be sure that you are aware of your job role and personal responsibilities in relation to anti-discrimination.

Most workplaces have a policy and set of procedures that deal with how to treat others and reflect the principles of anti-discrimination legislation. Be mindful of the organisational and legal expectations placed on you, especially when writing and sharing information, to ensure it is free from discriminatory remarks and uses inclusive language.

Anti-discrimination legislation is contained in a series of Commonwealth and state/territory Acts that require workers and employers to treat everyone the same regardless of age, gender or background.

Commonwealth Acts include:

- *Age Discrimination Act 2004*
- *Australian Human Rights Commission Act 1986*
- *Disability Discrimination Act 1992*
- *Racial Discrimination Act 1975*
- *Sex Discrimination Act 1984.*

Practice task 1

Read the two case studies, then answer the questions that follow.

Case study

Anna is an administration officer for a local council. Her job is to process planning applications for local businesses. She receives an application for a cafe that wants to include an outdoor seating area. As the cafe borders a residential area, she is required to consider additional information in order to process the permit. Council protocols say that access to this type of information must be via a senior staff member. Anna follows these protocols in order to proceed with her duties.

1. Why do you think these protocols are in place?

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2. What might happen if Anna does not follow these protocols?

Case study

Maria works as an administrator in a university. She coordinates the records of what courses are offered to students. She regularly receives changes to the subjects that students can study. When she receives notification of a change, she must update the brochures for the course, the website information, the internal manuals, and student and teacher records. By following a checklist, Maria ensures that all course records are updated and consistent.

3. What other systems could Maria use to ensure all materials are updated?

4. Make a list of those who rely on Maria's information being up to date.

1B Use reliable methods to collect information efficiently

It is essential that you can trust the information you collect to use at work. If the information is not reliable, then you risk consequences as small as a staff member's name being spelt incorrectly on an award or as large as budget projections being out by thousands of dollars. Your methods of gathering reliable data must be an efficient use of your and others' time, or the department's or organisation's productivity may be affected.

Below are some tips for beginning your search for information, to ensure the information is reliable and makes efficient use of time and resources.

When

Find out when the information is needed. This helps you plan your search. It is not useful to spend three weeks collecting information your manager wants in two days. You may need to ask other people for help when your time line is very short.

What

Make sure you know exactly what information is needed. Information that is not relevant and reliable can cause unnecessary expenses and affect productivity.

How much

Make sure you know how much information is needed. You can waste valuable time gathering large amounts of information when only an overview is required.

Collate

Think about how you will combine the information you gather to ensure it is grouped and categorised in a way that is useful to you. You may use a database, spreadsheet, Microsoft Word document or written list. It may be useful to draft some main headings to help you collate the information.

Collect information

Collecting relevant information requires focus, organisation and self-discipline. Make sure the information is from a reliable source. Whatever the source of the information, keep in mind that it must be collected efficiently. This means using available resources effectively and not wasting time.

Depending on your role, you may be asked to:

- help your manager complete a report by finding information about current employment trends and current sales statistics
- update details on a database, such as a customer database or debtor database
- gather statistics, such as monthly sales or trends in the industry
- collect feedback from customers by using a focus group or customer satisfaction survey, or similar method
- research competitors' products and services
- research travel and accommodation options
- collect organisational files.

Collect information: from different sources

Information can be collected from many different sources.

Staff should be familiar with the types of information held in various departments and who is responsible for it. For example, the sales department may manage sales records, while personnel records are the responsibility of the human resources department. Some organisations may have a central administration office responsible for managing many different types of information. This information may be collected and stored in various ways, such as word processing files, databases, spreadsheets, graphic and other sorts of software applications, and paper-based files. Information can be categorised as either primary or secondary sources. Primary sources of information are considered more reliable than secondary sources because they are 'closer' to the item you require information about. Examples of information sources in each of these categories are provided below.

Primary sources

Primary sources are usually people and include customers, managers and supervisors, colleagues, contractors, suppliers, people from other organisations and librarians. They also include your own observations and experiences.

Secondary sources

Secondary sources are usually documents and include books, magazines and journals, business documents, financial statements, the internet, your organisation's intranet and paper-based or electronic files.

Collect information: from other people

A good source of information is other people. These people include managers, colleagues in your own team, colleagues from other work teams, customers, office staff, technical staff and experts. You should be familiar with people's roles in an organisation and the specific types of information they have. Often information is 'in someone's head' and may need to be documented for future reference.

Getting the right information from people can often be a matter of extreme importance. For example, customer service staff must ask specific questions about their customers' needs in order to better serve them. Office staff must be clear about what is expected from them so that they can collect relevant, accurate information.

Information from other people can be collected in various ways, including informal questioning, observation and listening, formal interviews and documents. The information below provides further detail on each of these information sources.

Meetings

Holding a meeting (and recording the meeting information in minutes) is a common and efficient way of distributing and collecting information. Many organisations have regular staff meetings to keep staff up to date with product and sales information, personnel movements, new procedures and so on. Project teams have regular meetings to discuss aspects of the project, let all members know how the work is progressing, and give team members opportunities to report on the stage they are at and discuss any difficulties or achievements.

Interviews

If you are conducting a formal interview or a focus group to gather information or specific data, prepare your questions beforehand. Know precisely the type of information you are seeking. Keep the interview brief and focused, and word your questions clearly and unambiguously.

Documents

Verbal information is not the only way you can involve others in your research. Documents written by others, such as client letters and referrals or records of conversations in clients' files, may also be helpful.

Collect information: from the internet

You can find a wide range of information on the internet; for example:

- written material – on subjects including businesses, products, government departments, people, educational institutions and areas of personal interest, such as travel or health
- discussion – including email, discussion lists, newsgroups, chat sessions, blogs and social media such as Facebook and Twitter
- computer programs, software and music – available to download and print or save onto your computer, either free or for a fee
- services – such as banking, financial advice, flight timetables, news, online shopping and videos.

The biggest challenge when using the internet is retrieving useful information. Search engines help you find information on the web. However, you often find a lot of irrelevant information as you search. It is vital to know, use and develop effective search techniques.

Collect information: tips for using the internet

Here are some tips when using the internet.

- When using a search engine, use keywords or click on 'pages from Australia' to see only Australian content.
- Use the bookmark function in your internet browser to mark a useful page – that way you can find it again quickly.
- When gathering information from the internet, remember to include the name of the site, author, title, publisher and the date the information was retrieved.

Collect information: from an intranet

Some organisations manage their own intranet. This is an electronic system similar to the internet, except that it is a private network that holds information only available to the organisation's staff. The main purpose of an intranet is to share organisational information among staff. Set aside time each week to browse your organisation's intranet to stay up to date and learn to navigate the site quickly.

Most intranets contain the following types of information:

- General information, such as contact details of branches and departments, the company profile and history, reports and policies
- Details of products and services, such as product specifications, price lists, brochures, sales scripts and services offered
- Databases containing customer contact details, purchasing history, correspondence and preferences
- Sales data, such as sales figures and targets, stock lists, sales analyses and reports
- Human resources information, such as leave forms, policies and procedures manuals, staff contact details and training resources
- Regulations and legislation relating to the organisation

Collect information: from files

Records kept in current or archival files often need to be accessed to retrieve information for a request or project. For example, you might be asked to:

- obtain a list of former contractors
- find a contract
- see how much a previous project cost.

Become familiar with the filing system in your organisation so you do not waste valuable time searching.

Collect information: from other organisations

Information from other organisations is collected for various reasons. Be clear about the information you need so the people you are asking can obtain it quickly and send it to you.

This type of information includes:

- product brochures and other marketing materials that list goods or services required by the organisation
- annual reports that contain statistics, financial information or the achievements and objectives of competitors
- stock market data
- tax and accounting information
- customer credit applications.

Below are some tips to follow when seeking information from other organisations.

What to explain when asking for information from other organisations
• The information you need • Why you need it • How you would like them to respond to you (for example, via email, post, telephone) • What format you would like the information in (for example, raw data or a brochure)

Collect information: from journals, books, magazines and business documentation

Printed information, such as books, newspapers, magazines and journals, has usually been screened for errors or misinformation and is reasonably reliable. You should, however, check the information is correct and up to date.

Sources of information are more likely to be credible if they come from government agencies, educational institutions, and journals and magazines from professional bodies.

Organisations often subscribe to industry journals and magazines. These might be stored in a library or an area where staff have access to them. Some organisations also keep electronic copies of journals on their websites. Be familiar with the types of information contained in these publications. You can save a lot of time and effort if you know where information is likely to be found.

When collecting information from publications, include bibliographical information, such as the author, title, publisher, place of production, date, volume number and page numbers.

Collect information: from forms

Forms are used to collect information according to a format that makes it easy for the information to be analysed. When forms are used, the information collected is in a consistent and comparable format. For example, a recruitment application form asks a series of questions about the applicant, including personal details and employment record. Applicants provide individual details that can be verified and compared.

Feedback forms are used to extract opinions about services or goods provided. Data collected through feedback forms is usually transferred to a database, where it can be statistically analysed.

Electronic forms have fields that allow the user to enter information using a computer keyboard or other method of data entry. Electronic forms are common on the internet and are also used on company intranets. Electronic forms may include fields, checkboxes and radio buttons.

Collect information: from observation and listening

You sometimes need to collect information by watching and listening to others. For example, you may have to report on the way staff are following new recycling procedures or how they are complying with WHS regulations.

Prepare a checklist of the information and data that you want, so your observation is focused.

Collect information: from communication networks

Networks are informal groups of people with a similar interest who communicate regularly for mutual benefit. When you need information, you know who to contact for advice.

People in the workplace use networks to share information and ideas. Networks often have an advantage over other forms of communication used in the workplace because they can allow information to flow more freely.

Sometimes people hear and pass on information by chatting to colleagues, friends or family, who in turn pass on the information to others. This is often referred to as a 'grapevine' and is an example of an informal communication network. You can use a grapevine to your advantage when gathering information, as long as you always check the information for accuracy. Sometimes information on the grapevine is incorrect or out of context and is being used to communicate gossip, rather than factual information. If you contribute to it, make sure you do so with information that is accurate.

Practice task 2

Read the case study, then answer the questions that follow.

Case study

Emily works for a national furniture-manufacturing company. Her manager wants to collect sales information for competitor companies operating within Australia. Emily is given the job of collecting and filing this information.

1. How might Emily's manager and the organisation as a whole use this information?

2. Write down what Emily could do to begin the process of collecting this information.

3. When the information arrives, how could Emily store this so that it is easily accessible and can be kept up to date?

1C Assess information for clarity, accuracy, currency and relevance

In order to assess information in the workplace for its clarity, accuracy, currency and relevance to intended tasks, we need to be clear about how a staff member or organisation intends to use it. Which tasks will it assist with? Who will the user be – a senior manager or a customer service representative? Is only the most current data required or is older data needed to present a picture of growth in a report?

How business information is used

Organisations use the information they prepare and receive to help their business to grow and to maintain competitiveness. For example, managers require data in order to review and formulate both short-term and long-range plans.

Specific departments and teams need information relating to their area of responsibility. For example, human resources personnel need to understand current legislation on access and equity, and customer service officers need to be familiar with the organisation's current products and services.

Management uses information to:

- prepare and monitor quality assurance systems, perhaps by using information from customer feedback or quality assurance reports
- comply with legal requirements; for example, tax records or OHS reports
- ensure security and confidentiality procedures are in place by using documented procedures in manuals
- prove accountability by preparing documents such as financial statements or annual reports
- ensure records are current; for example, by recording meeting minutes or producing regular printouts of sales figures
- ensure staff are aware of policies, procedures and protocols by providing manuals or information from performance appraisals.

How business information is used: examples

All information collected and distributed is used by the organisation to support its business practices.

Below are some examples where information was needed for analysis, decision-making and developing plans, strategies and options.

Analysis

Parkinson's Office Supplies was considering buying new software to manage customer orders. Before management purchased anything, however, they needed precise information about how orders were currently taken and how the process could be improved. The resulting analysis was used to decide on the software best suited to the situation. Management realised that the software used by large retail stores – the software they had originally considered buying – was not suited to their small business, which sold fewer items to fewer customers.

Decision-making

Stills and Nash, a clothing manufacturer, planned to produce 8000 pairs of socks during May. Having a set target enabled the organisation to determine the amount of wool and cotton thread it needed to have in stock, the staff numbers required and the payroll estimates. Also, sales staff used the production target to estimate the amount of stock that would be available to customers over a given period.

Plans and strategies

Jenny works as a receptionist at a chain-store toy supplier. Over a period of a month, she received a number of calls from customers asking for a specific electronic game they did not stock. Jenny monitored customer demand using a form she developed to record all customer inquiries. She took her research to management, who asked her to continue with her research for a set period of time. They would then decide whether to include this game in their product range.

Use an information management system

Information is only useful if an organisation can derive a benefit from it. To determine this, you need to regularly assess the information for its suitability for its intended purpose, as well as its clarity, currency, accuracy and relevance, to ensure it meets the organisation's requirements.

Managing large volumes of information requires a systematic approach throughout the organisation if information is to be used effectively. Organisations spend large amounts of money on record-management systems that store and track information. However, at regular intervals this information must be assessed – material that is no longer necessary should be archived or disposed of. Depending on the information, assessing it may be your individual responsibility or one that your whole team shares. For example, you will know if your emails are out of date and can be deleted, but it may be the whole team's responsibility to assess and update workplace procedures or out-of-date documents.

An effective information management system should be in place to:

- assess information held by the organisation to ensure it is accurate, relevant and reliable
- collect information in an efficient way
- organise the information so it is easily accessed
- monitor the collected information to ensure it is current.

Assess information for clarity

Not all information is clearly written, current, valuable, accurate or reliable.

Think about the audience or main users of the information. If the content, style and language are clear for the users' purposes, the information can be assessed as useful. Check for jargon, technical language or colloquialisms that may be unfamiliar to readers. For example, technical, academic and highly detailed information can be assessed as useful and clear if it is relevant to the audience or main users.

Information should be clearly and logically organised under relevant headings or a numbering system and should be easy to navigate.

Assess information for currency

Organisations retain information on many aspects of their business operations and history. Constant monitoring, reviewing and archiving of material are essential in order for current information to be useable. Some of the material an organisation collects is needed so staff can be sure they are complying with current legislation or regulations; for example, in the area of work health and safety.

Check the date of material to make sure it is current. Information that is out of date is generally only valuable if the intention is to use it for research material, in which case its preparation date must be clearly acknowledged. Remember that information accessed through the internet is often obsolete and it is often difficult to find the date when it was written.

To make assessing information easy and quick, make sure you date your documents or keep an electronic file that lists relevant pieces of information and their date of last change.

Example: assess information for currency

Animal Magic, a veterinary practice, keeps files on all animals brought to the practice, with information such as the breed, sex, record of treatment and owners' contact information. Over many years the practice has collected a lot of information, but has neglected to update it when owners have moved to other suburbs or pets have died. Many records are now redundant, but take up valuable space in the filing cabinet. When the vet wants to send some promotional material to current customers, he finds that many on the database are no longer relevant.

Small businesses of this type need to reorganise their filing systems regularly to avoid becoming swamped with information that is no longer required. In the case of Animal Magic, the office administrator may decide to remove or archive a file if no visits have been recorded after a certain period of time.

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Assess information for accuracy

Inaccurate information can be dangerous. For example, wrongly recorded or out-of-date information about hazardous chemicals used in a manufacturing business could lead to serious consequences for staff using these substances.

Information can be judged for accuracy according to the following criteria.

Currency

When was this information last updated? What time period does it cover? Documents (both electronic and paper forms) should have the indicated date and time. If you don't know the date of the document and you can't find out, regard the information as questionable.

Reliability

Comparing drafts, versions or copies of similar documents can often supply enough evidence for you to make a decision about which is most accurate and up to date. Always check the author's credentials and where the information was sourced. Inclusion of footnotes, references and citations adds to the reliability of a document.

Validity

If a document is signed by a relevant person, it can be taken as valid. An unsigned document may not contain credible information and may not be current.

Verification

The information may have been checked and verified by someone with appropriate authority. For example, accounting data may have been authorised by a senior accountant.

Assess information for relevance

Before you can dispose of even the smallest memo or note, you must first establish what information is relevant and so should be retained and filed, and what should be discarded. How do you decide what to keep and what to discard?

Much of the material stored in an office has a limited life. For example, the office product catalogue is out of date once a new one has been issued containing different goods or prices. Similarly, a sales report is superseded when a new report is issued containing current figures. You may have kept instructions for operating a piece of equipment that has been replaced, so your information is no longer valuable.

It is an important step in assessing information to check whether it is still useful in some way to your colleagues, before it is discarded. While you may not need the information for your job, others may.

Practice task 3

1. Describe some techniques to check the currency of information.

2. List at least three ways that you can identify whether material you have collected is accurate.

1D Use interpersonal skills to access information from colleagues

Using appropriate interpersonal skills is essential when you are collecting data or information from people. Establish a good rapport with the people you wish to receive information from. A pleasant, courteous manner puts people at ease, encourages cooperation and helps to build relationships and networks. Comply with legislation by using inclusive language.

When gathering information from other people in the workplace, always use language the other person can understand; check that you understand what the other person has said; listen carefully to understand the other person's viewpoint; and use appropriate body language to assist the communication process.

Below are some tips for accessing information from other people.

Approaching people

When approaching people for information on the telephone or in person, always ask whether it is a convenient time for them, or if they prefer you to make an appointment or contact them at another time. Ensure you use the correct protocol in contacting them. For example, it may be inappropriate for you to directly contact a senior person in the organisation, but you should contact their assistant as the first step.

Being prepared

Know what you want to ask and phrase your questions clearly and succinctly. Avoid having someone say later, 'Oh, I didn't know that was what you were talking about' or 'Why didn't you tell me that's what you wanted to know?'

Researching

Don't forget to do some research beforehand to ensure that you don't waste someone's time by asking for information that is readily available elsewhere, such as on the internet. Information can be collected over the telephone, by email, by formal letter, via a survey or face to face.

Use the telephone to access information

When collecting information or data over the telephone, you must have a clear idea of what is to be collected before making the call. Prepare a list of the information required and the questions to be asked. If the information is detailed, make subject headings or prepare a standard form that can be filled in during the conversation. Make sure you know who you are talking to and what authority they have.

Use email to access information

Email is an excellent tool for collecting information. A single request for information can be distributed to many individuals. This saves time and effort. The recipients can respond to the request when they are free to do so. Clearly describe the information you are seeking and explain why you are seeking it. Always state when you want the information and how you want the information sent to you.

The following are some tips for using email.

Tips for using email
Check your message before you send it – you may regret sending an email that was written in haste. Make sure your wording is clear and appropriate.
Check the email address – many emails have been accidentally sent to the wrong person or to everyone on a mailing list when they were intended for only one person.
Organise your files – if you are receiving a lot of information by email, set up folders in your email software and file the messages.
Find out what sort of correspondence you need to keep; for example, your organisation may have a procedure for filing your communication with suppliers.
Understand email etiquette; for example, don't use all capital letters because this is widely interpreted as shouting.
Explain to the recipients whether the content of your email is confidential.

Example: use email to access information

Send

To... Sales staff

Cc...

Subject: Information needed

Hello Sara, Matt, Casey and George,

I know you are busy but could you please email me the latest sales figures for your state/territory. I need them to complete a report. I'd like to have the data by Thursday 7 June at the latest. I also need:

- the highest and lowest performing customers
- the best selling product
- the least sold product
- any customer feedback you've received.

Please let me know if you are unable to send me the information by this deadline.

Thanks, Brian

Send letters or forms to access information

When requesting information via a letter or asking people to complete a survey or questionnaire, follow these three rules: be polite, be brief and be clear.

Most people do not have a lot of time to spare, so making it easier for them to respond increases the quality and the rate of response. For example, make sure the questions in a questionnaire focus on the specific information you need and are unambiguous, such as 'Where did you hear about our products?', 'Is information on safety aspects clearly provided to you?' and 'What quality aspects of our products appeal to you?'

Use face-to-face communication to access information

Face-to-face communication is often the most effective form of communication. Collecting specific information requires the use of interpersonal and communication skills. The four most important communication skills that help you get the information you want are listening, questioning, asking for feedback and using appropriate body language.

Use listening skills to access information

If you want to collect verbal information from people, you need to be a good listener. However, good listening is hard work. Most people hear the voice but may not listen to the message. You need to listen actively.

It is important to make eye contact with the other person and give them your undivided attention. Don't let your eyes wander around the room. Divert your phone to voicemail before the meeting. Close the door to your office so no-one interrupts.

Use gestures or verbal cues to show you are listening, such as turning towards the person, nodding your head and saying 'Yes' or 'I understand'.

Listen for key words and key emotions. Notice the feelings behind the words and how the words are being said. Take in the nonverbal parts of the message so you can more accurately assess what is being communicated.

Below are some more tips for active listening.

Tips for active listening
• Take notes to remind you of what is said. • Don't interrupt or change the subject. Wait until the person has finished speaking before you give your point of view. • Ask for clarifications and examples so that you clearly understand what is said. • Ask for real-life examples. Find out the facts behind the impression given. • Don't criticise, evaluate, comment or pass judgment. • Keep an open mind. Ask questions. Don't make assumptions. Listen to the facts. You can evaluate what you are hearing and link it to other information later. • Hear it all. Don't engage in 'wishful hearing'. Sometimes we hear what we want to hear, rather than what is actually being said. • Summarise what the speaker has said, to draw together the main points of the conversation and ensure you understand the information accurately.

Use questioning skills to access information

Gathering information from people involves asking questions. The ability to ask the right question at the right moment in a conversation can save time and energy, and avoid misunderstandings and frustration. Do not assume the other person knows what you mean. There is a particular skill to asking questions. You must first decide what information you are looking for and then ask questions that help you get the information you want. There are different ways to ask questions, as outlined below.

Open questions	Open questions are a good way to start a conversation because they elicit information and ensure a discussion takes place. You cannot answer 'yes' or 'no' to an open question. Open questions usually begin with 'when', 'why', 'how', 'where', 'what', 'who', 'tell' or 'give'. For example: Why did you ...? What happened when ...? How did you ...?
Closed questions	Closed questions can only be answered with a 'yes' or 'no' or a specific detail such as a number or name. They can be useful in saving time because they discourage further conversation. Closed questions usually begin with 'did', 'will', 'is', 'can', 'do', 'would' or 'how many'. For example: Can you do this? Will they meet with me? Is this correct?
Probing questions	Probing questions allow you to explore a train of thought further. They are similar to open questions, except that you lead the conversation in a direction that helps you gather facts. For example: Do you think the reason ...? Was it because ...? In what way do you think ...?
Clarifying questions	Clarifying questions draw together the main points of the conversation. In your own words, restate what the speaker has said, to check that you have understood. This ensures the accuracy of the information and confirms agreement between you and the other person about what is being discussed. For example: From what you have said, you would like your health insurance policy to reflect your change in health. Have I understood correctly? Are you saying that ...? Do you believe the problem is ...?

Ask for feedback to access information

How do you know you have correctly identified the type of information you want to collect? You may need to ask others, including your team members, for feedback. Feedback can be verbal, including comments, tips and helpful suggestions. It can also take the form of written notes, memos or reports.

If your team holds regular meetings, you could use the opportunity to assess the way you have interpreted your information. For example, you might ask:

- Have I missed anything?
- Am I on the right track?
- Are there any other issues involved?

Use appropriate body language to access information

People communicate in three ways: body language, words and tone (including clarity, volume, inflection and pitch). There have been estimates made of the importance of each of these three ways of communicating; body language contributes 55 per cent to the total message; words, surprisingly, only contribute 7 per cent; and the tone of our voice is rated at 38 per cent.

Nonverbal messages can help when you are collecting information. Your expression shows the other person whether you have understood what they said or, similarly, whether they have understood your request. Be aware that different cultures view things such as body contact (for example, shaking hands), body language and eye contact differently. Understanding what is appropriate in a particular situation is vital to effective interactions.

Below are some tips for using body language when collecting information.

Using body language when collecting information
• Incline your body towards the other person (this communicates energy and attention). • Face the other person squarely (this communicates involvement). • Maintain an open position with arms and legs uncrossed (this communicates an open and non-threatening attitude). • Position yourself at an appropriate distance from the speaker (this maintains the speaker's comfort). • Use eye contact to attend to someone or to engage their attention (appropriate eye contact is essential to effective personal communication).

Practice task 4

1. Are the following open or closed questions?
   a) Can you tell me about that?
   b) Are you happy with the resolution of the problem?
   c) What is your account number?
   d) What happened then?
   e) How can you correct this problem?
   f) Have you considered Mary's performance potential?
   g) What message would you like to convey in this article?

2. Write down the types of nonverbal signs someone might display if they were:
   a) agreeing with what you were saying
   b) disagreeing with what you were saying
   c) not interested in what you were saying
   d) not understanding what you were saying.

Summary

1. Managing information is vital if the information is to be used effectively.
2. Information can be gathered from a number of sources, including face-to-face communication, printed information and computer files.
3. There are many different types of information, including customer records, procedure manuals and quality assurance documentation.
4. Information may be accessible to different or limited numbers of people in an organisation depending on their job roles.
5. Information can be successfully managed by using information management procedures and processes that include how to gather, store, use and dispose of information.
6. When gathering information from others, you should use active listening techniques, ask appropriate questions and be mindful of your body language.
7. Assessing information for accuracy, currency, clarity and relevance in relation to its use is an integral part of managing information in the workplace.

Learning checkpoint 1
Collect and assess information

This learning checkpoint allows you to review your skills and knowledge in collecting and assessing information.

Part A

Read the scenario, then answer the questions that follow.

Scenario

Sophie works in the office of a manufacturing company that makes cleaning equipment such as brooms, mops, sponges and cleaning cloths. She has been asked to help with a research project the marketing team is undertaking on customer feedback and competitors' products and services.

1. In one or two sentences for each, describe the type of information Sophie might collect from:
   a) the internet

   b) the company's intranet

   c) the company's customers

   d) promotional material

   e) industry journals and magazines.

2. What could Sophie do to ensure the information she receives is accurate and relevant to the research?

3. Prepare a brief plan of how Sophie could access the information. Explain how the plan would make the best use of her time, other people's time and other resources she may have.

4. Describe the types of communication skills Sophie needs for this research and how she could use them effectively.

Part B

1. Identify four ways you can evaluate web-based information for accuracy, currency and reliability.

2. You have been asked to collect information on the benefits the new photocopier has brought to the office. Describe at least three ways you could collect reliable information.

Part C

Read the scenario, then answer the questions that follow.

Scenario

The Wiltown Entertainment Centre runs a large club that provides gambling facilities and operates two restaurants. Management is always looking to expand the business and diversify, and is currently investigating whether to introduce weekly live entertainment and film nights for members and their guests. To decide whether this is a viable business opportunity, Bruno Spearton, manager of the new business division, needs to estimate the number of people who are interested in attending film nights and live entertainment at the club. He also needs to recommend an appropriate entry charge for the films and entertainment. He asks his office assistant, Kieran, to undertake research and collect information the centre could use to help make its decisions.

1. Describe the types of information Kieran could collect from internal and external sources that would help Bruno make a decision about the viability of the new business venture.

2. How could Kieran find out information on the preferences (film or live entertainment) of potential customers?

3. What could Kieran do to ensure the information he gathers is reliable and accurate?

Part D

Use your own workplace or research an organisation to complete this task.

1. Describe three types of information the organisation collects.

2. Explain the sources from which this information is collected.

3. Who is responsible for collecting this information?

4. How is this information accessed and stored?

5. How is this information assessed for clarity, accuracy, currency and relevance?

6. How often is the organisation's information assessed for currency, accuracy and relevance?

7. Describe the types of communication skills people need when collecting information and how they can use them effectively.

8. Provide a one-sentence response to describe what you do when accessing information to ensure you follow:
   a) ethical principles and codes of conduct
   b) privacy legislation
   c) WHS legislation
   d) anti-discrimination legislation.

Topic 2
Organise information

Information collected should be organised in a suitable format so it can be easily accessed and is ready to use. You may have excellent information, but it is useless if no-one else can access it or it is in a format that makes it difficult to understand.

There are many different ways to organise information. The best one will depend on your organisation's systems and requirements, as well as the available technology. Techniques you can use to collate and present information in a way that is easy to understand include having clear headings, using charts and graphics, and storing the information in a way that makes it easy to get to.

In this topic you will learn how to:

2A Organise information in a format suitable for analysis and dissemination

2B Use appropriate technology and systems to maintain information

2C Collate information and communicate it to relevant people

2D Identify difficulties with accessing information and work collaboratively to solve them

2E Update and store information

2A Organise information in a format suitable for analysis and dissemination

Information must serve a purpose. Raw data is not useful in itself unless you can make sense of it. At some point, it needs to be organised and presented in a format that is meaningful to others. When you are making decisions about how to organise information, you need to ask a few questions.

- Who will use this information? Is the information for internal staff or external clients, a senior or junior person, someone with lots of knowledge on the topic or only a little?
- Are there any business requirements around its organisation and presentation, such as branding requirements? Should it be organised electronically or in hard copy?
- How will the information be used?

Types of information

Information use usually falls into one of three types: analysis, interpretation and dissemination, as shown below. Follow the organisation's requirements for organising the information into an appropriate format to assist readers.

Analysis

Analysis means to break a complex problem or data down into smaller, more manageable parts and examine it. This is often done because these smaller pieces of information will lead to a solution of a more complex problem. For example, analysis of interest rate patterns may explain customer loan approval rates and result in new loan products being advertised.

Interpretation

Interpretation means providing the meaning or explanation of a piece of information. For example, an interpretation of sales data can explain the buying patterns of clients.

Dissemination

Dissemination means to spread or broadcast information. For example, company financial information may be disseminated via its annual report to a wide range of internal and external stakeholders.

Format information

Format the information according to the type of information to be organised; for example, to collate information from surveys, develop a template and enter the answers to each question or prepare a table with a survey question at the top of each column.

The way information is to be disseminated also affects the format selected. For example, information to be presented as a booklet may be formatted using a desktop publishing program; information for a seminar may be prepared as electronic presentation slides.

Be familiar with a range of software applications for collating and communicating information, and make sure you are competent in using them and you always follow organisational requirements. Some examples of software applications follow.

Reports and letters

Reports and letters generally use a word processing application such as Microsoft Word. They might contain a table of contents, chapter numbers, headers and footers, or symbols to help readers locate information quickly.

Spreadsheets

Spreadsheets are an appropriate way to present financial information. The functions of a spreadsheet can narrow down sections of data that help in analysis. An example is Microsoft Excel.

Graphics

Graphics such as charts, diagrams, pictures and tables are a useful aid for interpreting written material. Make sure they are clearly labelled or have a legend (a key to what the colours or symbols mean) to make it easy to understand them.

Databases

Databases organise information about customers and sales records in a logical, consistent format. Some databases you may be familiar with include Microsoft Access and Tracker.

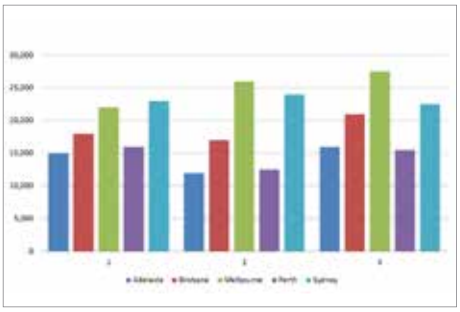
Format information using tables, charts and graphs

Tables, charts and graphs make certain types of information more accessible and easy to understand. Consider the difference between information about train departure times written in normal text and the same information displayed as a table: the table allows you to quickly scan to the day and time of the service you want.

Software packages used to create charts and diagrams allow you to draw lines and shapes, drag and drop shapes onto your page, connect the shapes with lines, and add text, colours and images. Different types of graphs are shown below along with a description of their appropriate use.

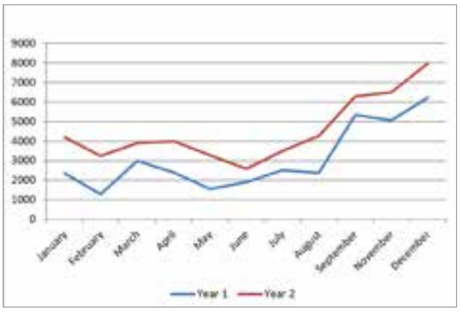
Different types of graphs that can be used to present information

Bar graph



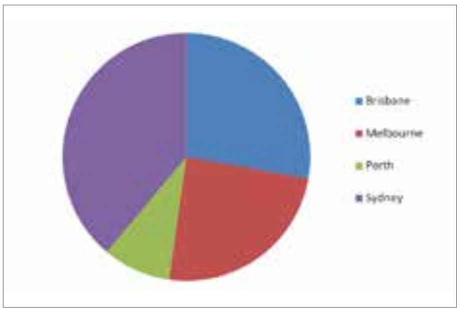
A bar graph is used to show relationships between groups. For example, you can create a bar graph to show how national sales figures fluctuate from one month to the next in different cities.

Line graph



A line graph is used to show continuous data or how one thing affects or compares to another.

Circle or pie chart



A circle or pie chart is used to show how one part of something relates to the whole. Percentages are often shown as pie charts, as is shown in the percentage of sales by city example.

Flow chart

Flow charts are used to create models of business processes and they show stages and relationships between items on the chart.

Format information incorporating graphics and pictures

Graphics and pictures are added to documents to:

- illustrate information
- show relationships, as with graphs and business charts
- improve layout and overall design
- provide links to more information, as with web graphics.

Here are descriptions of some types of graphics and pictures used in documents.

Clip art

Clip art is the name given to commercially produced electronic illustrations that can be inserted into a document. Clip art is used to add visual interest to documents, to illustrate an idea and to break the text into more accessible sections. Use Microsoft Word to have a look at the clip art available. Do this by selecting Insert > Clip Art.

Photographs

Photographs may be included in newsletters, personnel files, reports, brochures and many other office publications. Photographs can be scanned and stored as electronic files or simply uploaded from a digital camera. Documents with many photographs can take up large amounts of space on a hard drive and may not be practical.

Illustrations

Illustrations may be simple line drawings or complex computer graphics. Illustrations are used in technical documents (for example, engineering manuals) or documents that require graphical representation of subject matter.

Format information using web graphics

Documents stored on the web may contain images that are linked to other documents. Selecting an image on the screen activates a link to the image. For example, a web page on a company intranet may show pictures of management personnel and selecting an image may take you to details of the person's role and job description.

Format information using symbols

Symbols are used in documents to draw attention to some aspect of the information, such as a note or a tip, the type of information – for example, R (for 'research'), or to confirm or reinforce something.

Word processing and desktop publishing software applications provide a range of symbols that can be inserted into documents. Some symbols are standard, such as safety symbols. These are used to alert people to hazards, tell people about the need to use safety equipment and show the location of safety equipment, such as first-aid and emergency facilities.

Here are two examples of safety symbols.

Poisonous substance

Flammable liquid

Format information using software

Be familiar with and competent in using a range of software applications so you can select the most appropriate one for the job. Below is a summary of common types of computer applications and descriptions of what they are used for.

Word processing software

Word processing software produces documents, such as letters, memos and faxes, as well as complex reports, financial tables and procedural manuals. It is used when the content of a document is mostly text with headings to help the reader see what information is included. It is not suitable for a document with a lot of graphics and a complex layout. This type of software is extremely versatile, but sometimes other software applications do the job more efficiently.

Spreadsheet software

Spreadsheets are used when numerical calculations need to be made, such as for analysis (sales figures), planning (budget forecasts) or identifying specific data (tax calculations, hours worked). They can store values and make calculations based on those values and relationships. A spreadsheet is divided into rows and cells containing text, values and/or formulas. Before adding information into a spreadsheet, design your proposed columns and relationships on graph paper. This saves a lot of backtracking and reorganising of the information later.

Desktop publishing software

Desktop publishing uses a computer program to prepare and publish documents containing text and graphics, such as newsletters, reports, manuals, flyers, brochures and catalogues. While word processing packages can produce these documents in a basic form, it is better to use software specifically designed for desktop publishing. Desktop publishing packages, such as InDesign, PageMaker and QuarkXPress, have capabilities for dealing with layout and graphics far beyond those of word processing packages.

Presentation software

The most commonly used software for organising information for a presentation is PowerPoint, which allows you to create slides as a visual aid for the speaker. The slides can contain text, graphics, hyperlinks, graphs and photos. Well-organised slides contain key points, rather than large amounts of text, and are particularly useful for graphs and figures. Think how much easier it is to understand sales figures if you can see them at the same time your manager is talking about them.

Practice task 5

1. Present the results of some research about an organisation's promotional activities as a pie chart. These activities generated the following increases in sales:
   - a two-week newspaper campaign generated 18%
   - a mailout generated 25%
   - a new catalogue generated 35%
   - an advertisement in a trade journal generated 7%
   - a shopper gift voucher generated 10%
   - a two-for-the-price-of-one offer generated 5%.
2. List three examples of the type of products that can be produced using spreadsheets.
3. List three examples of the type of products that can be produced using word processed documents.
4. List three examples of the type of products that can be produced using desktop published material.

2B Use appropriate technology and systems to maintain information

Well-managed information gives organisations a significant advantage. The quality of information must be maintained by a continual process of reviewing and updating. To effectively maintain an organisation's information, you need to consider what systems are used to manage the information, such as information management systems, knowledge management systems and record management systems. Here is a summary describing these systems.

Information management systems

- Information management systems are used by organisations for the processing and delivery of information to ensure the right people get the right information. In the past, this simply meant having an efficient paper filing and dissemination system, but with the use of technology, information management systems are increasingly complex.
- An example of an information management system is a group email address for which only members of the group receive the information and can print, reproduce or use it easily and quickly.

Knowledge management systems

- Knowledge management systems are used by organisations to identify, create and distribute knowledge, such as knowledge passed from a manager to a staff member or knowledge learned in a project team that could be of benefit to another team in the future. It is about knowing who has what knowledge and ensuring it flows through the organisation.
- Knowledge management systems are mostly electronic databases or catalogues, where keywords and searches help to record or locate knowledge and owners of knowledge.

Record management systems

- Record management systems are used to maintain information on business activities. They control the storage, collation, distribution, archiving and/or destruction of information such as legal documents, contracts, customer order forms and invoices.
- Different countries, industries and businesses have different legal and organisational requirements for maintaining their records. Some companies have a system that takes all electronic and paper documents from the previous financial year and archives them using off-site storage because they are no longer needed. This allows the records that need to remain in the office to be up to date and accessible.

Use your computer to maintain information for your own use

In addition to understanding how information is managed at the organisational level, you need to know how to use technology to review information, decide whether it is useful and then store it.

On your computer, you generally have information stored on your hard drive, which can only be accessed by the person directly using the computer. Information may also be stored on a shared drive, a server or the cloud, where files can be accessed by others on the network.

It is important that you review what you store on your computer regularly, so the information you maintain is useful to you and also anyone you need to give it to. Keep information in systematically labelled files, use dates, version numbers and document pathways in headers and footers, and give documents clear names, so you know at a glance what you are looking at. Archive files according to organisational procedures.

Maintain emails

Some email messages can be deleted once they have been read, but most need to be filed and eventually archived. You need to decide which ones to delete and which to file. You can make these decisions by considering when they were sent – more recent emails may need to be kept until you take action on them; whether they contain information you still need, even if they were sent a long time ago; and whether they have file attachments you need to keep.

Once you have reviewed your email according to the above criteria, follow these five steps.

Maintaining emails

Delete messages you do not need to keep.

Forward messages that are to be shared.

File messages that need attention.

Save attachments to appropriate folders.

Follow up those emails that need action.

Maintain telephone information

Most organisations have an internal phone directory, a phone operation manual and protocols for dealing with messages left on answering machines and voicemail. These may be electronic or hard copy. Ensuring this information is accessible and up to date is essential for easy communication throughout the business.

- Store frequently used numbers in your phone. They can be updated easily if people change numbers.
- Deal with phone messages as soon as you can, responding to, deleting or forwarding them, so old messages are not left sitting on your system.

Maintain information using a photocopier, printer, fax machine and shredder

Only photocopy or print information you need to have on paper in order to be able to do your work, keeping sustainable work practices in mind. Always empty photocopier and print out-trays promptly. There may be an organisation policy that any documents left in out-trays at the end of the week will be destroyed. This eliminates the problem of having out-of-date copies lying around.

If your organisation transmits and receives business correspondence by fax, you may be responsible for maintaining the fax out-tray and making sure faxes are collected or distributed regularly. Replenish fax paper often to avoid hold-ups when the machine runs out of paper. You may be able to fax information directly from your computer if it has the appropriate software. Today, most people send email attachments rather than faxes.

Some paper information may need to be removed, by either shredding it or consigning it to a security bin provided by a document security company. Electronic versions may need to be deleted according to organisational procedures.

Use the internet and intranet

A company's website (on the internet) and its internal computer network, or intranet, are management systems themselves. They contain information, knowledge and records.

- Maintain good knowledge of what is stored on there.
- Keep a mapping document of how pages link up.
- If you print copies of web pages, make sure you check regularly to see if they are still current; for example, leave forms and applications for professional development.

Practice task 6

Think about a sporting or interest club you are familiar with.

1. Describe three sorts of information the club needs to maintain in order to operate effectively.

2. What systems does the club use to manage its information?

3. Describe at least three types of records that might be kept by the club.

2C Collate information and communicate it to relevant people

Organising information involves designing its format and selecting appropriate tools to enable it to be retrieved and used by relevant people. As part of the organisation's processes, this information needs to be collated. Collating is the process of grouping similar information together and formatting it ready for storage or presentation. Collated information needs to be classified so people can find what they need. To organise workplace information correctly and efficiently, employees must be familiar with the systems used in their workplace.

Here are some techniques for collating information.

Techniques to collate information
• Index information via appropriate classification systems or codes. • Structure information for ease of understanding, analysis, interpretation and dissemination. • Structure information for ease of retrieval by using summaries, subject headers, author names, versions, metadata and/or keywords.

Types of classification tools

Organisations collate and classify information in different ways. This is because what is appropriate for one organisation may not work for another. For example, an organisation may have an electronic directory of computer files and folders that includes information listed alphabetically, according to the way they have been arranged on the computer. The display is often in a tree formation; that is, inside each folder there may be more folders, files and documents. The information can be viewed in a series of windows that open one after the other to show what each one contains.

Records can be arranged or classified in a number of different ways.

Classification tools may include:

- alphabetical order (for example, customer record files under customer names, telephone books)
- numerical order (for example, customer account numbers)
- keywords, where the keyword is the subject
- geographical locations or regions (for example, sorting property files by suburb in a real estate agency)
- chronological order – items are sorted and filed by date, with the most recent documents at the front or top of the file
- subject – to keep different types of records about particular subjects together.

Example: use classification tools

Lucy sends a letter to a customer, Kate Sinclair. Lucy files a printed copy of the letter in the paper-based filing cabinet under the subject 'Customers'. Within 'Customers', it is filed alphabetically under 'S' for Sinclair. (Within the 'Customers' folder, there are folders for all the organisation's or sender's customers, listed alphabetically by file name, or by date created or modified.) As the letter is the most recent item of correspondence, Lucy files it chronologically, in front of the other records in Kate Sinclair's file.

Lucy also keeps a copy of the letter in the electronic filing system in the 'Customers' folder on the organisation's file server and in a 'Customers' folder on the hard drive of her personal computer.

The paper-based file includes documents received, as well as documents created by the organisation; for example, all the letters to and from Kate Sinclair. The electronic filing system includes electronic correspondence from Kate Sinclair (for example, email messages and attachments).

Indexing

Indexes are used to collate files that are arranged alphabetically or numerically. You use an index to look up the name or number of the file you want. For example, you may want to locate a file for a particular customer. You go to the index, look under 'Customer' and find the customer's name. The index record for the file tells you the file number. You then go to the filing system and use that number to locate the file.

Various types of indexes may be found within an organisation's filing system, some of which are shown below.

Card index	A card index for a paper-based filing system contains cards on which details are recorded and the cards are arranged alphabetically according to the file name or subject. This is becoming increasingly rare as more organisations use electronic filing systems.
Paper index	A paper index can list files alphabetically or use keywords so that files are found under a keyword.
Electronic index	An electronic index, or a database that staff scroll through or search, lists files alphabetically or uses a keyword system. The advantage of this type of index is that it can be immediately updated when a file is created or deleted.
Image-based index	An image-based index uses CD-ROMs for large volumes of image files, with each CD containing its own index.

Library catalogues

Libraries use a classification method to catalogue books. The Dewey classification system is used extensively throughout the world to classify books according to subject matter and allocated numbers. In the Dewey system, all books fall into one of the 10 main classes.

The Dewey system of classification:

- 000: Computers, information and general reference
- 100: Philosophy and psychology
- 200: Religion
- 300: Social sciences
- 400: Language
- 500: Science
- 600: Technology
- 700: Arts and recreation
- 800: Literature
- 900: History and geography

Communicate information to relevant persons

Once you have used the appropriate system to collate your information, it is ready to be communicated to others. The way you communicate the information will depend on who it is intended for. Always follow workplace policies and procedures for distributing workplace information, such as using organisational forms, ensuring the organisational logo appears on all material, using the correct etiquette in telephone calls and ensuring signatures are included where appropriate.

You could be required to communicate information to:

- supervisors and colleagues
- clients
- suppliers
- contractors and consultants
- external agencies
- committees.

Communicate information to supervisors and colleagues

If you are presenting information to supervisors or colleagues, ask them how they would like the material presented.

The way information is to be used usually determines the way it is presented. For example, it may be communicated in an online procedures manual, verbally during a staff meeting or on an information poster displayed in the office. A long report produced in hard copy will probably be presented in a traditional format with numbered sections, wide margins and binding on the left-hand side. Information being produced for a presentation may be stored as PowerPoint files or handouts.

Questions to ask supervisors and colleagues:

- Should there be a cover page?
- Will the company logo be included?
- Should disclaimers or copyright notices be included?
- Will a header and/or footer be required?
- Will the information be bound?
- How many copies of the information are required?

Communicate information to line managers

Line managers plan and manage resources and provide organisations with information such as production costs, production schedules, staff requirements and many other details involved in the day-to-day running of an organisation.

You may be asked to help a line manager collect and collate information on various aspects of business operations. For example, a line manager will have specific knowledge of the way items are produced in a manufacturing business. The organisation may decide to document this information and pass it on to the training department, where it will be included in training manuals.

Communicate information to clients

Information for clients can be delivered by mail, email, fax, telephone or face to face.

Most organisations have set procedures for delivering information to clients by these various methods. If information is emailed, mailed or faxed, include company details on files and documents.

When talking to clients on the telephone:

- greet the person you have called
- give your name
- give the name of your organisation
- explain the reason for the call.

Example: make an efficient telephone call

Jasmine Benn from a local shire council has been asked to send information to a client. A call is made to find out the client's mailing address.

	
Good morning, my name is Jasmine Benn from Gordon Shire Council. You asked the question about the blue-green algae in the local water supply?	Oh yes, that's right.
Sure, we've got lots of general information, would you like me to mail it out to you? Or if you've got the internet you could have a look at our latest research online.	I don't currently have internet facilities. Could you post it to me?
Certainly, I'd be happy to do that. What's your address?	67 Park Street, Moonee Ponds 3039 Victoria.
Awesome. Thank you so much for your inquiry. I'll get that off to you today.	Thank you. I really appreciate your help.

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Communicate information to suppliers, contractors and consultants

Information sent to suppliers, contractors and consultants must be accurate and provided on time.

Most organisations have specific documents that need to be completed to the satisfaction of all parties before work is undertaken. For example, a consultant needs a brief for their job, outlining all tasks and responsibilities and time lines for completion. A printing company must know exactly how many copies are required and in what format they are to be collated and bound.

Make sure you understand and follow organisational procedures and use the correct form or template required.

Communicate information to external agencies

External agencies may request information from your organisation. In some cases they will supply official forms to be filled in. If you are given the job of collecting this information, you may be required to have it signed off by someone in your office with the appropriate authority. For example, financial information supplied to government agencies is usually checked and signed off by an accountant.

Here are some examples of external agencies that may require information from your organisation.

External agencies that require information
• Federal government agencies, such as the Australian Taxation Office • State government agencies, such as authorities that grant licences and permits • Recruitment agencies • Statutory bodies, such as registration boards • Import and export agencies

Communicate information to committees

Many organisations form committees to assist management. The committees are allocated specific activities and combine the participants' knowledge and experience to bring about a certain result. You may be asked to present information to a committee in the form of an agenda, minutes and a report. The features of each are shown below.

Agenda
When there are a number of items to be discussed at a meeting, an agenda is usually supplied to attendees. The person chairing (or leading) the meeting usually determines the information to be included on the agenda. The agenda may include details of the date, time and venue; welcome and apologies; minutes of the previous meeting; business arising; correspondence; reports; other business; date of next meeting.
Minutes
Minutes are notes of proceedings recorded at a meeting. These are circulated to attendees to allow them to confirm that it is a correct record of what was said. Minutes record decisions made or recommendations for action. When taking minutes, you should first clarify how much detail is expected. Ask your supervisor or look at past examples within your organisation.
Reports
You may need to prepare a report to be presented at a meeting. Make copies for each attendee and, if possible, distribute them prior to the meeting so they have the opportunity to read the report and are prepared to discuss the information.

Practice task 7

1. Consider the following information from a mobile phone department in a telecommunications company. Complete the table indicating who you think would be interested in each item of information.

Information	Staff who would be interested
The sales teams' results for the month	
New products and services	
Special promotions	
Uptake of promotions and special offers	
Customer feedback	
New mobile phone sales targets	
Individual performance review results	
New business processes and procedures	

continued ...

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2. Read the case study, then answer the questions that follow.

Case study

Angus works in the office of a large hotel. His duties include organising rosters, administering bookings, filing, photocopying, and collecting and distributing mail.

The sales and marketing team at the hotel conducted a paper-based customer survey of people who attended a recent conference. The purpose of the survey was to obtain customer feedback regarding their satisfaction with the conference facilities at the hotel. The results of the survey have now been collected. As a professional development opportunity, Angus has been asked to collate this information and produce a report for senior management review.

a) How could Angus collate this information to make it meaningful?

b) What format would you suggest Angus uses to present this information to the senior management team? Are there any workplace requirements or ethical or legal requirements he should consider?

c) Who else might be interested in this information? (Important note: Angus should not distribute his report to anyone unless asked to do so. The senior management team wants to review it first and possibly change some work practices to better satisfy customers.)

2D Identify difficulties with accessing information and work collaboratively to solve them

Often you need others to help you access or interpret information, or provide more information. For example, you might ask people in the accounts department to supply you with financial data or you might talk to a line manager about the number of staff required to complete a job.

In a busy working environment, you may find people are not as responsive to your request for information as you would like. They may see your request as an interruption to their usual work schedule. Therefore, when you need information from others, it is important to approach them in the right way.

Resolve difficulties in accessing information

You can do a number of things to increase your chances of collecting the information you need from other people and other sources. Use your interpersonal skills to establish a rapport with the person you are seeking information from in order to access or organise information efficiently. Ways you can resolve some of the difficulties you may encounter are shown below.

Some ideas to assist with resolving difficulties in accessing information
1. Set up appointments Set up appointments by telephone or email with the people you need to speak to. An executive may not be prepared to drop everything and answer your questions immediately. If appointments are continually cancelled or rescheduled, tell the person your task is now becoming urgent. If necessary, talk to your supervisor or another colleague and enlist their help.
2. Be clear and take notes When you are asking for the information you need, be clear and direct about your needs. Don't waste time. Consider writing down your requests and any questions you need to ask. Take notes of what is being said so you don't forget and have to ask again.
3. Obtain permissions There may be difficulties if you do not have the right permissions or security clearances to access information from particular sources. Talk to your supervisor or other team members who may be able to help you if you need a logon password; a security clearance; a security pass to access different areas of a building; access to stores or filing cabinets; access to controlled areas such as a warehouse; or access to areas with strict WHS regulations.

Work with teams to resolve difficulties

All workers encounter problems they cannot solve alone. For example, you need confidential information about a staff member but do not have access to the password to obtain it from their file; you need access to the internet but the system is down; you cannot interpret a complicated graph.

People working together on a problem benefit from the experience of others who have encountered the same or similar difficulties. Working on problems collaboratively, recognising expertise wherever it resides in an organisation and sharing this expertise are the keys to turning information into knowledge in an organisation.

If you are given a task of collecting, analysing or organising information but strike difficulties, you can ask team members to help you. Always be courteous, speak clearly and listen carefully to their response. They may be able to:

- help solve the problem
- provide encouragement
- give constructive feedback.

Example: work together to resolve a difficulty

A number of team members are working on writing different parts of a report. They need to agree on where to save their collective work, how to name the documents so that other team members can access them and how they will keep track of the latest versions of each document.

The team leader suggests the best way to address the issue of how to manage common files is to have a meeting where everyone can contribute to the solutions. As a team, they all agree to:

- create common directories on the computer server so common files can be assessed easily
- save particular files to a common directory
- put version numbers on documents so everyone can see which document is the most up to date and update common files weekly
- make individual documents 'read only' so they cannot be modified by unauthorised people
- review individual files monthly and decide what is to be done with this information.

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Work with subject matter experts to resolve difficulties

People who are experts in their field are often referred to as 'subject matter experts'. These people are considered experts because they have highly specialised knowledge and skills. For example, they may know computer systems very well or have extensive knowledge and experience in a particular field such as risk management. They may have been in the organisation for a long time and have thorough knowledge of a business process and the way it is performed.

Subject matter experts are useful when you need specialist assistance. Their contributions can be vital when seeking and analysing information.

Practice task 8

Read the case study, then answer the questions that follow.

Case study

Si Yin works for an airline. Her manager has been told that customer complaints are increasing and has asked her to find out more information. She wants Si Yin to report her findings in one month.

1. Make three suggestions as to who Si Yin needs to contact in order to gather this information.

2. How could Si Yin collect and collate the information she needs?

3. In what format should Si Yin present her findings to her manager?

2E Update and store information

Maintaining information involves updating existing information so it remains useable. Well-organised information can be easily found, accessed and updated. For example, check that personnel records are current and information about staff who have left has been archived, that software help manuals match the software used in the organisation and that journals in the library include the most recent issues.

To make room for updated information, you may need to dispose of obsolete information. This should be done in accordance with organisational requirements and systems. Do not delete or dispose of information that is still useful. Be clear about what information you need to keep for confidentiality reasons, such as client records, personnel files and financial data. Make sure documents of this type are not left openly in the office. Some organisations provide locked bins for the disposal of confidential documents. Shred documents to securely reduce the amount of waste material in the office.

Update computer information

Information maintained on computer systems includes databases, documents, financial tables, spreadsheets, library records and web pages.

An organisation may include procedures for maintaining computerised information in its procedures manual. There may also be a company style manual that details preferred document layout and design.

Documents created on a computer are easily modified. However, check that the documents you change retain the correct formatting and that changes are included in connected parts of the document. For example, if you have updated the table of contents, headers and footers, and version numbers and checked that logos and address details are correct, also check that links in interactive documents lead to the right places and that linked graphics are still accessible.

Update organisational information

Here are some ways to update information in the workplace.

Intranet information	The organisation's intranet may be used to store information about the organisation, personnel matters, policies and procedures, occupational health and safety, quality assurance and much more. If any of this information changes, the intranet needs to be updated. You may need access to a particular software application to do this.
Internal telephone directories	You may be required to maintain directories of internal or external telephone numbers. Internal staff may change phone numbers due to office reconfigurations. Some organisations have systems that allow individuals to update their phone numbers by keying codes into the handset. Others may store phone details on the intranet. If you have voicemail or an answering machine attached to your phone, you should ensure it has an up-to-date message for callers.
Client details	Organisations with large numbers of clients may store customer details in a database. Clients normally let you know if their details change, but it is worth confirming information with them regularly by sending out information update forms that ask for confirmation of current addresses and telephone numbers. New information is keyed into either a database or a computer file.
Using a photocopier, printer or scanner	A photocopier, printer or scanner can be used to maintain or update large documents that are continually revised, such as reports and manuals. For example, you can use a photocopier or printer to add extra pages of updated information to documents that are to be distributed to numbers of people.

Store information

Information must be stored so it is safe and secure, and can be easily and quickly retrieved when required. Organisations spend considerable time investigating how best to store their information. They take into consideration:

- what information to store
- the best way to store different types of information
- how the information will be retrieved from storage
- how much it will cost to store and retrieve important information
- how safe the information is while it is in storage (safe from environmental hazards such as dust and secure from unauthorised access)
- whether any floor space is needed.

Types of storage tools

How information is stored depends on how it is to be used and how regularly it needs to be accessed. Follow organisational requirements; for example, you may store information on the hard disk of your personal computer, a portable hard drive, a USB flash drive, a CD-ROM, a DVD or in a paper-based file in a filing cabinet or your desk drawer.

If the information you are storing is accessed regularly, it makes sense to keep it on a computer system. Computer-based information can be stored on a number of different storage devices.

Here are some common types of storage media and equipment. Ask your supervisor if you are unsure whether your organisation uses these types of storage.

Hard disk drives
A hard disk is part of the hardware of your computer and is used as a storage device for information. The hard disk is generally a non-removable storage device that allows large amounts of information to be stored.
File server on a local area network
Many organisations link their computers to each other so employees can share information and printers. Linking computers happens through the use of a local area network (LAN) to a central file server. A file server is a large hard disk drive that everyone can access. Application programs and documents you create using these applications are stored on the LAN file server. This is a very effective way of sharing information.
External hard drives
An external hard drive can be plugged into a computer or removed and kept separate. The connection to the computer may be through a USB connector. This type of drive is good for backups of large amounts of data.
USB storage devices
Memory cards, flash drives and USB (universal serial bus) memory sticks are used as portable storage devices. They have the advantages of being compact and able to store large amounts of data.
Cloud storage
Cloud storage is storage space on a commercial data centre accessible from any computer with internet access. It is usually organised through a service provider. It is used as an off-site backup.

Optical disks
Optical disks are known as CD-ROMs (compact disk – read only memory) or DVDs (digital versatile disk). They can store large quantities of information. While they are decreasing in usage, some organisations use CD-ROMs to store reference materials and data in a compact and convenient form. They are also used in the education industry to store interactive training applications. CD-ROMs are portable, small and can conveniently be used to back up important files.
Magnetic tape
This is a storage device used mainly for backing up information from a file server, but is becoming obsolete. Magnetic tape comes in the form of cassettes and cartridges for personal computers, and tape reels and cartridges for mainframe computers. Small cartridges can store over 100 gigabytes of information.

Store information using filing systems

Some organisations store all of their information together in one large centralised filing system, while others use a decentralised filing system where each department or section of the organisation stores its own records. Some organisations combine centralised and decentralised systems; records that are relevant to the whole organisation are centrally controlled, while records relevant to only one or two departments are held in those departments so they are easy to access. There may be an index to the decentralised filing system in the central filing area so files of either system can be located by anyone who needs them.

Some workplaces provide an explanation of the filing system in a policies and procedures manual, or there may be a separate user manual for different filing systems. Often staff can also provide assistance.

You need to be familiar with the filing systems, security procedures and safe recording practices.

Security procedures and safe recording practices

The information an organisation uses and stores must be managed efficiently and effectively to ensure it is secure, complies with privacy legislation and meets ethical standards and industry codes of practice. Staff must be made aware of the need to treat information with due care, such as presenting information without bias or prejudice, and to follow procedures to maintain confidentiality.

There may be a number of workplace policies and procedures to guide you, as shown below.

Workplace security and safe recording practices include:

- having login passwords for all computers and virus protection software installed
- using required backup processes
- using data recovery systems
- using procedures to archive and destroy outdated files
- using security clearance to access some information
- using a key to access stores or filing cabinets
- using a security pass to access different parts of a building
- making sure confidential information is never left exposed
- not discussing specific organisational information outside the workplace.

Store information using a centralised filing system

A centralised records system is often used in large organisations, such as government departments, where large numbers of records are held. Many smaller organisations also store their records centrally. For example, a doctor's surgery generally keeps all patient records close to the reception area.

All users must follow the organisation's standard procedures for looking after files.

In a centralised filing system:

- all of the organisation's records are stored in one location
- specific staff look after the organisation's records
- records staff are responsible for creating new files, keeping track of file movements and transferring or destroying old files.

Store information using a decentralised filing system

The records manager may set up standardised procedures for storing decentralised records. This ensures filing procedures and systems are the same throughout the organisation, as shown here.

Characteristics of a decentralised filing system
Each area of the organisation is responsible for managing its own records.
The people who use the records are responsible for keeping the records in order, rather than one person maintaining the entire records system.
Records management procedures may vary from department to department.
The classification system (how the records are arranged, such as alphabetically or numerically) may vary from department to department.

Store information in a library

Some organisations have a central library where reference material is stored. The library may have a paper-based catalogue as well as an electronic one for easy reference. In some organisations, each department has its own bookcase storing the books, reports, journals, etc. that it regularly uses. Many people have their own personal library.

Practice task 9

Compare the advantages and disadvantages of different file management systems by completing this table.

System	Advantages	Disadvantages
Manual filing system		
Digital filing system		
Digital online system		

Summary

1. To be useful, information must be organised and collated in meaningful ways.
2. When collating information, keep the end user in mind. Think about how they would like to see information presented and format it accordingly.
3. Information can be collated and presented as documents, graphics, tables, charts and spreadsheets.
4. Information comes from various sources, including people. It is important to work with people to ensure you can access information from them and provide them with the information they need to do their jobs.
5. Information must be kept up to date so it continues to be useful.
6. Information can be stored in different ways using various tools.
7. Difficulties arising from sourcing, collating and storing information should be discussed with your team and supervisors. Together you should be able to resolve these issues in order to achieve the goals for your organisation.

Learning checkpoint 2
Organise information

This learning checkpoint allows you to review your skills and knowledge in organising information.

Part A

Read the scenario, then answer the questions that follow.

Scenario

Your manager has asked you to collect information from a new printing company about printing costs for your organisation's annual hard-copy catalogue. You are to compare these costs with those of the printing company that currently prints the catalogue and present the information at a managers' meeting.

1. List at least three questions you need to ask yourself before you gather the information, about who the information is for and how you will organise it. Write a possible answer for each question.

2. What software applications will you use to present the information?

3. Where will you store the information?

4. A year later, your manager is preparing to publish a new catalogue. How might you update the information to ensure it remains current?

Part B

Different types of software allow you to present information in many different formats. Prepare a table similar to the one below, listing three software applications, and describe three types of information best presented by these software applications. Include examples.

Software application	Type of information	Example

Part C

1. In a table similar to the following, identify the most appropriate way of maintaining, updating and storing items of information found in an office.

Item of information	How updated/maintained	Storage tool
Customer order forms		
Emails		
Customer feedback questionnaires		
Individual performance review documentation		
Personnel information		
Business letters		
Journals (e.g. *Business Review Weekly*)		
Training manuals		

continued ...

... continued

Item of information	How updated/maintained	Storage tool
Software help manuals		
Monthly production reports		

2. Select two of these storage mediums and explain why they are the most appropriate for the specific item of information.

Part D

If you are in the workplace, answer the following questions yourself. If you are not currently working, use the same questions to interview a friend who works in an office.

1. Explain, using dot points, the methods used for collating and classifying specific types of information held in the organisation.

2. Describe two different groups you send information to. Describe at least two methods you have used for communicating information to these people, including any workplace policies and procedures you need to follow.

3. Explain in dot points or two or three sentences what preparations you make or questions you ask before you present the information.

4. List three types of problems you have encountered when accessing and/or organising information. How were they resolved?

5. List the benefits of working collaboratively with others.

Topic 3
Review information needs

Organisations must regularly review the information they receive to ensure it remains relevant to the organisation's needs and is being used to support the organisation's business operations. By reflecting on the quality of information received, organisations can identify the types of information they need, as well as assessing whether they need to improve their information collection strategies.

Organisations may need to provide information to external bodies, such as agencies, statutory bodies and associations. It is important to review what information has been required in the past, analyse what may be required in the future and assess the methods of collection, storage and distribution.

In this topic you will learn how to:

3A Actively seek feedback on clarity, accuracy and sufficiency of information

3B Review the contribution of information to decision-making and modify collection processes

3C Identify and document future information needs and modify collection and reporting processes

3A Actively seek feedback on clarity, accuracy and sufficiency of information

Actively seeking feedback from both internal and external sources is essential to ensure the information the organisation receives and sends out is sufficient in type, relevance, accuracy, clarity and scope.

It may be your responsibility to obtain feedback from your colleagues, supervisor or manager, customers, suppliers and any other people your organisation does business with. Feedback can be written or verbal and can be collected face to face, over the telephone, via email or over the internet. It can be gathered informally or through formal questionnaires and surveys. Feedback can also be obtained from documentation such as quality assurance data, audit records and other formal records, such as customer complaint forms and returned-goods receipts.

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Use feedback from colleagues and supervisors

Ensure you have enough information to meet the requirements of the end user. Enlist the help of colleagues or supervisors to make sure you have collected the right information.

Always ask the person for whom you have collected the information whether they were happy with the type of information you provided, whether it was clear and easy to understand, and if it was relevant, accurate and timely, and so enabled them to make informed decisions. If not, perhaps the instructions you were given were not clear or comprehensive, so you were unsure what information they wanted.

Feedback about the amount and quality of information gathered is very important in order to improve the collection process and to help management make accurate decisions.

Valuable time can be wasted if the information provided:

- does not match what was asked for
- contains irrelevant information
- is not sufficiently detailed
- is difficult to understand
- is out of date or inaccurate
- is not backed up with appropriate examples or statistics.

Use feedback from customers

Organisations need feedback from their customers about the quality of the information they provide and how they can improve this. They need to know whether customers understand their catalogues, brochures, information booklets, correspondence and notices. They also need to know whether the information is sufficient, timely and relevant, and meets customer needs. For example, information may need to be presented in more user-friendly language or provided more frequently. Information may also need to be edited and proofread more thoroughly to ensure accuracy.

Feedback can be obtained through surveys or questionnaires included with each product or service that ask customers to complete and return them to the organisation; in a telephone discussion; through evaluation forms distributed at the end of a seminar or training session the organisation has conducted; on the organisation's website; or via feedback forms placed on service counters for customers to complete.

Analyse all feedback so you can see where the organisation needs to make improvements to its information provision by modifying its processes.

Use feedback from unsold or returned goods

Customers return goods when they are not satisfied with the quality or performance. Most organisations have strict policies about the return of goods. You may be asked to find out why the goods were rejected by the customer and to record the details of the complaint and either send these to the relevant personnel or make a face-to-face presentation.

By keeping a record of complaints and returned goods, an organisation can identify where it needs to improve. For example, pages may be missing from a book; equipment may be faulty; clothes may be poorly made.

Make sure all complaints forms are filed and stored according to organisation procedures.

Example: keep records up to date

Pacemaker Shoes Goods return form			
Product	**Description of fault**	**Resolution**	**Signed**
'Surefoot' running shoes	Sole came loose after three wears	Sent out new pair, contacted manufacturer	MW
'Blue Lagoon' sandals	Broken strap	Returned to manufacturer	CM
'Dorothy' casual shoes	One shoe different size	Replaced with right size	RC

Use feedback from quality assurance data

Quality assurance (QA) data is important to most organisations aiming for high production standards. In some organisations, a QA team is responsible for making sure all products or services supplied to customers meet the required standards. For example, a software company would use QA testing procedures to ensure its software products perform as expected.

QA data provides information about the quality of an organisation's products or services. This provides valuable feedback to the organisation as to whether it is meeting customer expectations, as well as identifying opportunities for improvement.

For example, an organisation that supplies goods, such as clothing, may learn from QA testing procedures that an undesirably high percentage of the clothing is subject to shrinkage. The organisation may then use this information to decide that more stringent requirements need to be specified to the fabric provider.

Use feedback to check information processes

Results from surveys, complaints forms, emails and discussions should be collated, organised and presented to management in a useable way.

An organisation may find that, although it is constantly receiving feedback, this does not tell it what it needs to know; for example, the information may be irrelevant or not comprehensive enough to enable any kind of judgment. The organisation may decide that it needs to improve its feedback forms in order to receive quality feedback.

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Use feedback from audit documentation and reports

Information from audit documents and reports can be used to collect feedback on the quality of information. For example, the Australian Taxation Office may conduct an audit, which is a formal examination of an organisation's or individual's accounts or financial situation to find out whether they have been paying enough tax.

Organisations also conduct internal audits to check for accuracy in figures and records made by others in the workplace.

The term 'audit' is also used in many other situations where information is collected and documented. For example, an organisation may receive a number of complaints about safety in the workplace and so needs to assess the way it conforms to work health and safety (WHS) standards. It may carry out a WHS audit to identify any hazardous operations and breaches of legislation. By conducting a safety audit and analysing the data, the organisation can take steps to make improvements.

Practice task 10

Read the case study, then answer the questions that follow.

Case study

Doreen is in charge of quality assurance at a clothing importing company. Her organisation supplies clothing to large retail chains. When a new shipment arrives, Doreen has the job of checking the goods for quality. She examines at least one item in each carton and compares it to a list of quality requirements, such as:

- garment stitching is neat and not broken
- elastic is correctly attached
- garment has no holes or tears
- fire-safety standards have been observed.

Doreen notices that garments from one manufacturer are particularly poor, while garments from another manufacturer consistently meet all quality requirements.

1. How could Doreen record her findings?

continued ...

... continued

2. How can Doreen's findings be communicated to her supervisor?

3. How could the organisation use Doreen's information when making decisions about business operations in future?

3B Review the contribution of information to decision-making and modify collection processes

After required information has been collected, the methods used and the results gathered should be reviewed. The information may be used to determine how the organisation will improve its business processes, customer service strategies, financial operations and much more. Reviewing the ways information is used can help you find better ways of focusing your research, and of collecting and presenting information in the future.

The review process provides an opportunity to determine whether the right information was collected, how it was used, updated and stored, and how this can all be done better in the future.

A process to review information includes:

- looking at the ways the information is used
- assessing the time it took you to collect the information
- assessing the way you collected the information
- assessing the way you presented the information.

Example: review procedures

Ella has been asked to collect customer comments for a marketing survey. She writes out a number of questions to ask clients and then phones them. When her manager reviews the results, he realises she has not asked customers whether they would recommend the service to others. Ella learns that this information is important and that she needs to collect it next time.

Ella is asked to collect information about the overtime hours worked by contractors in her department. She begins by asking people to send her their time sheets, but soon realises not everyone is prepared to act responsibly and send their time sheets when requested. Because of this, she almost fails to deliver the information on time. She decides that next time, she will ask people to email their time sheets to her by 11 am on the appropriate day.

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Understand the review process

Reviewing information allows organisations to make better decisions today and tomorrow, and also in two, five and ten years from now.

Reviewing information is a continual process and part of a quality assurance system. Information is reviewed to ensure it is of the highest quality, so an organisation can be confident in using it to make decisions.

When reviewing whether information has made a positive contribution to the decisions an organisation makes, you should consider the quality of the information and the process followed.

Review the collecting process

You need to evaluate the actual process of collecting information. If this process is inadequate, the information collected will also be inadequate; for example, a poorly constructed questionnaire may not give you relevant information. Modifications include preparing an improved form to record information, using better research techniques and providing additional time to collect information in order to ensure the information is what is needed.

When reviewing whether or not information has made a positive contribution to the decision-making process, ask a number of questions.

Was the information:

- presented to the right people for appropriate decision-making?
- useful, reliable and valid?
- up to date (the latest version of that document)?
- presented in a timely manner (when it was needed)?
- presented in a format that was understandable and useable?

Review the quality of information

In the review process, it is vital to consider the quality of the information. Is the information reliable, current and valid? For example, someone who works in the real estate industry may be asked to collect information to forecast 'up-and-coming' suburbs. If they find and use information from the previous year's database, that information will be out of date. Decisions based on that information would be useless.

Review information needs

You need to determine whether you have accurately identified the information that was needed. Was the recipient of the information able to make appropriate decisions based on the information provided?

Identifying information needs should be a principal goal. Unfortunately, this stage often does not get the attention it deserves. Many assumptions are made about the information needed. Never assume anything and always check with the appropriate people. Below are some typical questions that should be asked to review information needs.

Questions to ask to review information needs
• What was the exact information requirement? • Why was the information needed? • What organisation or department goals did this information contribute to? • What information is used or needed in order to make decisions? • How was the information need communicated? • Who else might need information in this area? • How accessible is the available information? • What information is currently available?

Review how information is collected

Information is collected from many different sources, including emails, reports, customer records and surveys, telephone calls, meetings, informal and formal communication networks, journals and computer sources. Use the questions that follow to begin the review.

Questions to ask for an information review
• Was the right information collected? • Were the right questions asked? • Where did the information reside? • Were all sources of information explored? • How was the information collected? • What search techniques were used? • What technology was used? • How timely was the information? • How long did it take to collect the information? • How can all the above be done better in the future?

Review how information is used

The following questions can be asked to review whether the information collected was used to its full potential by all interested parties:

- Who used the information?
- Will there be other users of this information in the future? Who?
- How was the information used?
- How could the information be better used?

Review how information is organised and presented

At this stage of the review, ask whether the information has been organised and presented to interested parties in a way that suited their needs and allowed them to make the best decisions.

Questions to review how information is organised and presented include:

- How was the information organised?
- How was the information presented to the recipient?
- Were the organisation and presentation of information appropriate?
- Could the information have been organised and presented differently?
- Was the information organised in a way that allowed it to be easily found and accessed, or did people have trouble accessing it?
- How might the information be better organised and presented in future?

Review how information is maintained and updated

Review whether the information required high maintenance and a lot of updating, and consider the best way of doing this. Ask the following questions:

- Did the information need regular updating or was it a one-off update?
- Who was responsible for updating the information?
- How could information updates be improved in the future?

Review how information is stored

Review whether the information was stored appropriately. If your review finds that information was difficult to locate and access, then you know storage could be a problem. Ask the questions that follow.

Review information storage processes
What system/s was the information stored on?
Was the storage tool appropriate for the type of information?
Who else needed to access this information?
How easy was it to obtain the information from storage?
How was the information backed up?
How easy was it to recover information from the backup tool or storage site?
What new storage technologies are being developed to store information in the future?
Have advances in technology provided a cheaper backup medium than is currently being used?
Is information stored off-site as well as on-site for risk management purposes?

Practice task 11

Read the case study, then answer the question that follows.

Case study

Lee works for a marketing company. His supervisor asks him for the latest figures on unemployment in country areas. The figures are stored in a central database. Lee provides his supervisor with the data in a report. He includes a table and a chart to make the figures more readable.

After Lee's supervisor has read the report, she asks Lee to include the following categories when presenting statistics to her in the future:

- Gender
- Age
- Distance from a major town
- Level of training/education
- Marital status

What reviews should Lee conduct to ensure it is possible to present the information his supervisor has requested?

3C Identify and document future information needs and modify collection and reporting processes

The information needs of an organisation may change over time. The causes of change may be unplanned and haphazard. Before future information needs are established, organisations need to collect information and identify what needs to be changed.

The challenging question is, 'How can an organisation be more proactive in identifying its information needs?' A number of things can be done to make this process more reliable.

Following are some examples of the ways information needs change.

Changes to information needs
• An organisation once relied on personal contact with its customers, but now distributes feedback forms through the post. • A bookshop now sells books over the internet and keeps records of all customer transactions. • Due to increased competition, an organisation needs more regular information from customers about their needs. • A new database requires a unique product code to be created for every product. • An organisation's production has increased and it now needs bar codes on its products to assist distribution.

Use information reviews and feedback

Use your learning from information reviews to plan how you might do things better in the future. For example, you may have learned that your organisation's technique for sourcing information is too narrow; you can then plan to gather information from a wider range of sources. Feedback from surveys may indicate that you need to improve the way surveys are constructed. Perhaps you need to focus on establishing a better relationship between yourself and the people you seek information from.

Identify the modifications you need to make to collection processes, and inform your supervisor or manager, who will help you incorporate them into workplace procedures and make sure everyone understands the adjusted collection processes.

Conduct an information needs analysis

An information needs analysis identifies the future information needs of an organisation. This analysis provides a framework within which you can proactively plan for the future. A needs analysis may involve observation, individual research and a series of meetings where you gather information through interviews and brainstorming sessions.

A needs analysis asks two main questions: What information do we have now? What information do we want to have?

The shortfall between these two questions provides the necessary direction on which to focus your energies.

Questions to ask include those listed below.

Information needs analysis
• What type of information is needed? What is required in the short, medium and long term? Are there gaps in the current information? • Do people know where information can be found? How can existing information be used better? • How often is stored information accessed? If information is not frequently used, it should be discarded. If used often, find out why, how often, how and by whom. • Are there any concerns about the sharing of information? • How is current data obtained and used, and should the source base be widened for the future? What information might be available in the next three to five years? • How quickly might information be needed in the future and what would be the best way of ensuring needs are met on time? • How can the organisation ensure the information it receives and provides is of consistently high quality? • Is the information presented in the required format/s? • How can better relationships be forged between those who provide information and those who use it? • What are the likely costs involved in meeting future information needs and can the organisation afford to meet these or afford not to?

Document future needs

The results of an information needs analysis and review are recorded and used to make decisions.

Results are collated into a document for those with authority, such as supervisors and managers, to use to make decisions based on the result findings. You can use media such as word processing documents, spreadsheets and databases to ensure information regarding the future needs of the organisation is presented clearly and is easy to understand.

One useful method of recording information is to create a template, or standard form.

The final step is to use the information you have recorded. Once the authorised people understand future needs, start planning to incorporate approved modifications into the organisation's recording processes.

Example: use a template to record the results of a needs analysis

Future information needs analysis	
What information is needed?	
Where will this information be obtained from and by whom?	
Who will use the information?	
What storage tool will be used?	
How often will the information be updated?	
How will the information be presented (formatted)?	

Practice task 12

Read the case study, then answer the questions that follow.

Case study

Sanjeev's office has received a new document shredder. He notices that some people do not use it properly and are at risk of suffering injury. Some men have complained that their ties have become caught in the shredder. Sanjeev is concerned and decides he should do something about this.

1. What could Sanjeev do to resolve this problem?

continued ...

... continued

2. What type of information could Sanjeev provide to reduce the risk of injury from the shredder?

3. Where could Sanjeev find further information to help him?

4. What is the best way for Sanjeev to present this information?

5. Where should Sanjeev place this information so his co-workers can easily access the information?

Summary

1. Reviewing information is an important part of the information management cycle.
2. A review should assess the quality of information, as well as the processes of identifying, collecting, organising, using, presenting, updating and storing information.
3. Feedback from customers, colleagues and reports is an important part of reviewing information to ensure clarity, accuracy, sufficiency and relevance.
4. Identifying future information needs is vital to the continued success of an organisation. Future information needs can be identified using information reviews and information needs analyses.
5. Documenting the future information needs of an organisation is important. Reports and other visual representations of data should be included when you are presenting findings and making recommendations to managers.

Learning checkpoint 3
Review information needs

This learning checkpoint allows you to review your skills and knowledge in reviewing information needs.

Part A

Write a reflective piece not more than one page in length. Consider your own abilities in collecting feedback and in reviewing information. Include where you believe you have strong skills and where you need to develop. Outline jobs or experiences where you have used these skills and try to come up with some ideas to improve your areas of weakness. Draw on experiences from your workplace or from your daily life.

Part B

Think of one type of information regularly used by your organisation or an organisation you have researched. It may be information from or about customers (such as sales figures, preferred products or services) or it might be a database of product information (such as prices, colours or dimensions). Conduct an information needs analysis to work out what information might be needed in the future and document this in the following table.

Future information needs analysis	
What information is needed?	
Where will this information be sourced from and by whom?	
Who will use the information?	
What storage tool will be used?	
What will be the frequency of updates?	
How will it be presented (formatted)?	

Part C

Read the case study, then answer the questions that follow.

Case study

Carla manages Spectral Entertainment, which hires out DVDs and computer games. The business has been operating for two years, but has not been as successful as she had planned. There is a similar store three streets away and she has been reliably informed by a friend who works there that it is doing very well.

Carla has noticed that many of her customers are families who request children's DVDs she does not have in stock. She has also had some complaints from customers that the quality of the DVDs is poor and that some may be pirated copies.

The computer system that records hiring transactions is limited and not comprehensive enough in its reporting – Carla would like to know about the computer games that have been out for longer than a week and the names of the customers who hired them. Often she has to do additional analysis to get this type of information.

You have been asked to review Spectral Entertainment's information management system, which includes stock collection, suppliers, customer records and reporting capability. Your aim is to analyse the current system and its adequacy in providing Carla with the information she needs to improve her business.

1. What information does Carla need to ensure the store is more successful? Is any additional information needed that is currently not available to her?

2. How can Carla ensure she detects any changes in customer preferences or needs?

3. What criteria could you use to determine whether the information system is providing reliable and current information?

4. What reporting format might be most suitable for Carla to use in a presentation to the owners of Spectral Entertainment?

5. What feedback tools could Carla use to obtain feedback from customers? For example, rather than waiting for customers to complain, how could she be more proactive?