

BSB 7.0

BSBOPS101

**USE
BUSINESS
RESOURCES**

BSBOPS101

Use business resources

Release 1

Learner Guide

Aspire Version 1.1



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Before you begin

This Learner Guide is based on the unit of competency *BSBOPS101 Use business resources*, 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	These highlight key 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.
Summaries	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 provides definitions for each foundation skill.

Foundation skill area	Foundation skill description
Reading	<ul style="list-style-type: none"> Follows instructions in familiar texts
Writing	<ul style="list-style-type: none"> Records and updates documents according to instructions
Oral communication	<ul style="list-style-type: none"> Follows simple instructions Asks clarifying questions and responds to answers
Numeracy	<ul style="list-style-type: none"> Uses rounding and other mathematical techniques to estimate quantity requirements
Self-management	<ul style="list-style-type: none"> Follows organisational procedures when tasks are beyond own level of responsibility Follows clearly defined instructions provided by others
Planning and organising	<ul style="list-style-type: none"> Completes routine tasks taking some limited responsibility for decisions regarding equipment and resource choices, operation and maintenance
Problem solving	<ul style="list-style-type: none"> Responds to routine problems by referring to instructions or standard procedures

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: Prepare resources	1A Identify business resources for the task	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1B Check resources for usability	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 2: Operate resources	2A Use resources under direct instruction	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2B Take action and report issues	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 3: Maintain resources	3A Identify and undertake maintenance requirements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3B Maintain resources records	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3C Store resources	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident



Topic 1 | Prepare resources

- 1A Identify business resources for the task
- 1B Check resources for usability

1A Identify business resources for the task

When you first start working at an organisation, you will learn about the different business resources you will be using. Picking the right resources helps to make tasks easier and can save time.

The business resource you need will depend on what task you have been asked to do. For example:

- you may need to use a telephone to transfer calls, place callers on hold and get messages from the answering machine
- you may be asked to photocopy, print or scan a copy of a document. You will have to know how to input the correct settings on the machines
- you may have the responsibility of checking and replacing paper, ink and toner so the machines work well.

Although computers are a standard piece of business technology they are not included in this unit and therefore this learner guide does not cover using computers and software.

Here is a list of some of the common types of office equipment:

Multifunction printer/ photocopier	Machines that scan, copy and print hard copy (paper) documents.
Multifunction telephone	These can have many functions for communicating within or outside the organisation.
Answering machine	Usually built into the telephone system. These record messages when no-one is available to answer the phone. The messages need to be listened to and, when necessary, responded to.
Scanner	Often a function of a photocopier machine. Makes a digital copy of a document that can then be printed, viewed on a computer or sent in an email.

Binding machine	This enables you to sort or collate paper to make a booklet or comb bound document. For shorter, less formal documents, a stapler is the simplest way to securely combine and hold paper. Generally a cover is used on the front and back of a bound document.
Shredder	These machines cut sensitive documents into narrow strips so they cannot be read and can be disposed of securely.
Laminator	These machines use heat to stick a clear plastic protection sheet over a document.
Filing cabinet	Storage system for hard-copy documents. Often in a bookcase style cabinet with drawers. Can be locked to keep the documents secure.
Other equipment	This can include headsets, microphones, cameras, shelves and stands.
Consumables	This can include note pads, sticky notes, staples, pens, paper, markers, clips and plastic folders and sheets.

Depending on the type of organisation you are working for, you might need to use resources to service customers such as a digital point of sale (POS) cash register or a credit card terminal.

If you need to arrange delivery for products you might use a global positioning system (GPS) on a mobile phone to locate addresses.

You may also have to wrap and box parcels, weigh items and estimate delivery costs using digital scales and a calculator.

You will need to learn to operate equipment and use business resources efficiently and safely. This means you need to:

- choose the right equipment for the job
- locate the equipment and instructions such as operating manuals, procedures
- read instructions on how to operate equipment correctly and safely
- ask and respond to questions from your supervisor and other staff.

Example

Working in an office

Belinda has just started work as an office assistant in the planning department at Bayside Shire Council. Her supervisor is Mary, the administration manager.

The planning department depends on office equipment to do much of its work. Belinda has to learn what the machines can do and how to operate them. She has to use different resources for different tasks.

Here is a list of the tasks Belinda carries out and the equipment she uses each day.

Taking messages

- Belinda takes messages from the answering machine and summarises the details in an email to her supervisor.

Making photocopies

- Belinda makes photocopies of papers required for meetings using a photocopy machine.

Printing and scanning images

- Belinda prints documents using a computer and a printer. She scans images and sends them to her supervisor in an email.

Using the telephone

- Belinda answers the telephone, enters customer orders into the computer, transfers calls and puts callers on hold. She uses a mobile phone to send text messages to her supervisor when she is out of the office.

Follow instructions

In your workplace, there will be information and instructions telling you how to do your tasks. Information and instructions may be part of a workplace procedure or found in an operation manual.

You may need to read different types of information to learn how to complete each task. For example, you may refer to a manual to find out how to load paper into the printer. You might need to read the manufacturer's instructions on where, and how, to store equipment.

Instructions are often written as a step by step process and may have pictures or symbols illustrating each step.

When you read and follow instructions, make sure you understand what the words mean. If you do not understand what is written or do not understand what an image or symbol means, ask your supervisor to explain.

Here are examples of words that may be used when reading specific workplace information.

Hazardous substances	Substances that can cause harm to a person's health or the environment.
Personal Protective Equipment (PPE)	Items you wear to protect yourself from harm such as face masks, gloves or safety glasses.
Loading area	The place where trucks dock and are loaded.

Follow procedures

Procedures are documents that describe how to do something correctly. They also help ensure tasks are done safely, properly and the same way every time.

Your workplace may provide you with procedures about:

- protecting the privacy and confidentiality of others
- rules on cyber security such as when sending information outside the organisation
- using appropriate language when communicating with others at work
- working in a safe way when doing your job, such as:
 - operating a machine safely or when to ask for help with faulty machinery
 - when you must wear personal protective equipment (PPE) such as gloves when replacing ink
 - when you must report something you have observed that could be a risk of injury to others such as boxes not stacked correctly or too high
 - following instructions on the safe way to lift or move a heavy object.

Some workplace procedures will be based on laws. For example, there are laws covering privacy and work health safety (WHS).

Examples of workplace procedures might include:

- how to report a WHS incident or hazard
- how to answer the phone or how to put a call on hold.

Always refer to these documents and if you have questions about any procedures used in your workplace, talk to your supervisor.

Estimate resources

As you use the equipment you will get to know the various functions of each machine.

Each piece of equipment uses different consumables; these are the resources that run out and need to be replaced. When preparing for a task, you should estimate what consumables you need to complete the job. This means working out the amounts you will need.

For example, if 50 copies of a single page document are required you will not need to add a large amount of paper to the machine to do the task. There are 500 pieces of paper in a ream, so one way to estimate is to look at the height of a ream of paper and estimate that 50 copies are less than 1cm tall. Check the drawer of the photocopier and if the paper tray has at least 1cm paper there will be more than enough to do the job.

You will need to estimate the resources required for many of the tasks you are asked to do:

- number and lengths of staples for the photocopier
- the amount of letterhead or coloured paper required for printing
- number of binding combs for the binder
- number of plastic sheets for the laminator
- number of consumables for a meeting such as pens, notepads, markers

Information about resources

When you begin a new job, someone will show you the equipment you need to use and explain how to operate it.

Knowing how to use office equipment efficiently can make your job easier and can also save money. For example, using a photocopier to copy 50 pages can be faster and cheaper than printing them using a printer.

You can take notes on how to use a machine or you might be given a manual or procedure with the steps outlined for you. This might include diagrams with images or flow charts that show what needs to be done in the correct order. Always ask questions if you don't understand something.

Here is a sample of the type of information you need to know about each piece of equipment.

- what the machine does
- how to operate it safely
- the consumables (materials that run out) that the equipment needs
- how to look after the machine
- what to do if it breaks down.

Resources for a photocopier

Collect all the resources including consumables before you begin a photocopying task, as shown below.



- First you need the document you are going to photocopy.



- Make sure there is enough paper in the photocopier tray to make the required number of copies. Check what size paper you need.



- Check there is enough of that size of paper in the paper tray before you begin the task.



- You may be photocopying onto letterhead paper or coloured paper. Check you have selected the correct paper tray that contains letterhead or coloured paper.

Example

A checklist for a task

In this example, you can see how an office assistant has written a list of things they need to do to prepare a report.

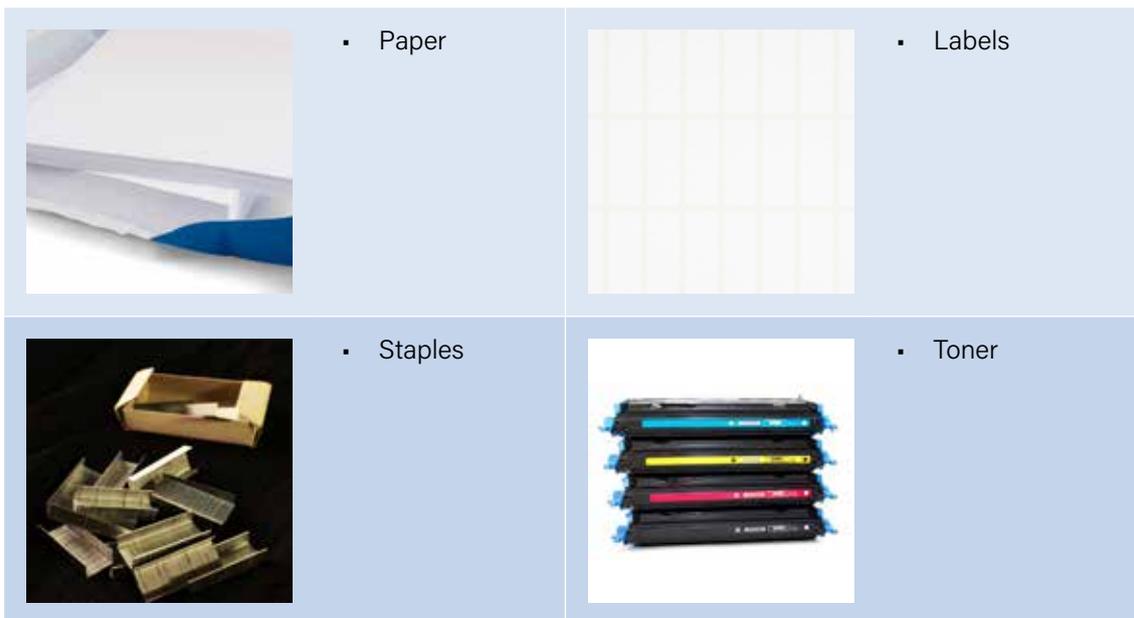
- Task 1: single page letter
- Use A4 letterhead paper.
- Check letterhead paper is in the photocopier tray.
- Select single-sided printing.
- Make 30 copies.
- Task 2: 25 page report
- Check there is enough paper in the tray.
- Select double-sided printing.
- Select stapling in the top right hand corner.
- Make 10 copies.
- Bind each report into a booklet using the binding machine.

Consumables for a printer

The powdered ink used in printers, some flatbed scanners and photocopiers is called toner. It is contained in plastic cartridges.

If the ink on the printed page looks faint or a message appears on the printer, it is time to change the toner. A machine will usually indicate when replacement toner is required. Follow the instructions in the manual to know what to do. You may also have a procedure that requires that you wear gloves and that the used cartridge be disposed into a special bin for recycling.

The consumables you may be using with a printer are shown below.



Resources for the telephone system

If you are answering telephone calls, you should have a notepad nearby so that you can write down any messages. Many organisations have a special message pad for staff to use. You may then be required to deliver the handwritten note to the person who the call was for, or send the information in an email.

You should keep a list of the extension numbers for all staff members. This should be easy to read and find and will make it quicker to call or transfer calls to them.

Access resources

As well as knowing what resources you need, you must find out where your supervisor wants you to do the work. For example, tasks such as binding or printing may be done in a special area of the office or in a particular room in the organisation where the equipment is stored. This might be called the 'photocopy room' or 'work area'.

A special area or room keeps the equipment together in one place so it can be located easily by those who need it and is convenient to use. It also means that people are not disturbed when you are doing a task that is noisy or takes some time to complete.

Practice Task 1

Question 1

Draw a line to match each business resource to its description.

- | | |
|---------------------|---|
| » Answering machine | » Used for communicating with other staff or with customers outside the organisation. |
| » Filing cabinet | » Records messages when no-one is available to answer the phone. |
| » Telephone | » Cuts sensitive documents into narrow strips so they cannot be read and can be disposed of securely. |
| » Consumables | » Cabinet for storing hard-copy documents. |
| » Shredder | » Resources that need to be replaced such as paper, stationery, plastic folders. |

Question 2

Which of the following statements relate to preparing resources to do a task? Tick all that apply.

- Instructions can be found in an operating manual.
- Ask your supervisor to explain what an instruction means.
- Use the photocopy room to work so your supervisor cannot see what you are doing.
- Procedures make sure tasks are done safely and in the same way every time.

Question 3

Select true or false for the following.

Belinda estimates that each staff member uses two pens every six months. There are 15 staff so that means 30 pens need to be in the cupboard at any one time. » True » False

1B Check resources for usability

Before you use any business resource, check that it is in working order and ready for use.

Some businesses have pre-use checklists which require you to read and check off each item on the list before you use a resource to confirm that it is safe and ready to use. This may be a part of workplace health safety checks and you may be required to sign and date the checklist to show you have completed it.

The checklist can also be used as a record to identify the condition of equipment before and after it has been used.

Here is an example of pre-use checklist for a paper shredder:

Resource name:
Name of user:
Date of use:
Estimated return time:
<input type="checkbox"/> Clean and free of dust. <input type="checkbox"/> Waste tray empty. <input type="checkbox"/> Feeder entry clear of paper. <input type="checkbox"/> Power cord and plug undamaged. <input type="checkbox"/> Motor quiet and not running hot. <input type="checkbox"/> No flashing lights. <input type="checkbox"/> Screen not indicating faults.
Signature:
Date:

Ready for use

It is good practice, and polite, to leave equipment in good working order for the next person. You do not want to be delayed when completing an urgent task because the resource was not where it should be or it could not be used due to a fault. For example, the electric long arm stapler had been left with a jammed staple or a printer with a paper jam.

Check for any notes left on the equipment or in the logbook. The equipment may have a note saying it is not to be used or it is waiting to be repaired.

Your supervisor may suggest you trial the equipment before you start. This is one part of checking you have everything you need in preparation for the task. You will need to read the manual or operating instructions for information on what to do and how to begin. Your supervisor may show you how to check the resources are safe and ready to use.

Preparing the equipment might involve:

- turning on the power and giving the machine time to warm up
- checking the settings
- collecting the consumables you will need
- printing or copying a draft or practice document
- turning off the machine.

If it looks as if something is not working correctly, report it straight away to a supervisor or other staff member. Many organisations have someone who looks after, and is responsible for, equipment. Their role is to ensure that it is kept in good working order, so that every time you use a piece of equipment it runs smoothly. You need to know who this person is.

	<ul style="list-style-type: none"> ▪ Switching a machine on.
	<ul style="list-style-type: none"> ▪ Operating it.
	<ul style="list-style-type: none"> ▪ Turning it off when the task is completed.

Practice Task 2

Question 1

Give two reasons why you should check that the resources you are about to use are in good working order.

Summary

- Business resources will be different according to the size and function of the organisation.
- Telephones, photocopiers/printers, scanners and shredders are examples of business equipment found in most organisations.
- You need to learn the functions of the resources you will use for the tasks you are given.
- Part of preparing to do a task is estimating the type and number of consumables you will need.
- Follow the instructions for each piece of equipment, including safety instructions.
- Make sure you have permission to use the resources and are familiar with how to use them.
- Instructions could be from the manufacturer and/or from the workplace.

Learning Checkpoint 1

Prepare resources

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

Case study

It is Tanya's first day in her new job. Her supervisor gives her a two-page document and says, 'I want you to print me 30 double-sided copies on yellow paper'.

1. Write three questions Tanya needs to ask her supervisor before she can do the task?

2. List two consumables will Tanya need?

3. Write a list of the things Tanya must do to prepare for the task. Make sure you include checking the equipment.

4. Tanya's supervisor asks her to place two copies of each document into separate folders. How many folders will Tanya need?



Topic 2 | Operate resources

- 2A Use resources under direct instruction
- 2B Take action and report issues

2A Use resources under direct instruction

Many business resources will have a detailed instruction manual written by the manufacturer.

Sometimes a manual has diagrams or images with step by step instructions that illustrate how to use the equipment.

For example, a photocopier may have instructions with diagrams that show you where to add paper and how to select different print and copy options. A telephone may have a diagram showing the function of each of the buttons.

Many organisations put up a sign near equipment that outlines the steps you need to take in order to operate it and what to do if there is a fault.

If you have the model and serial number of a piece of equipment, you can generally find a copy of the instruction manual online.

Your supervisor will demonstrate how to use equipment until you are confident you can operate it and complete the task on your own. Watch the demonstration carefully and take notes if you find that helpful. Your supervisor may check that you understand by asking you questions about each of the various steps taken to complete a task.

The following is some basic information on operating resources that are commonly found in organisations.

Using a photocopier

Photocopiers are machines that make copies of documents.

Photocopiers come in many sizes and with a wide range of features known as functions.

To complete work that you are given, you need to understand the parts of the photocopier and the many functions it can perform.

Basic parts of a photocopier

Photocopiers all have similar features, but they are likely to be located in different places on different brands and models of machines.

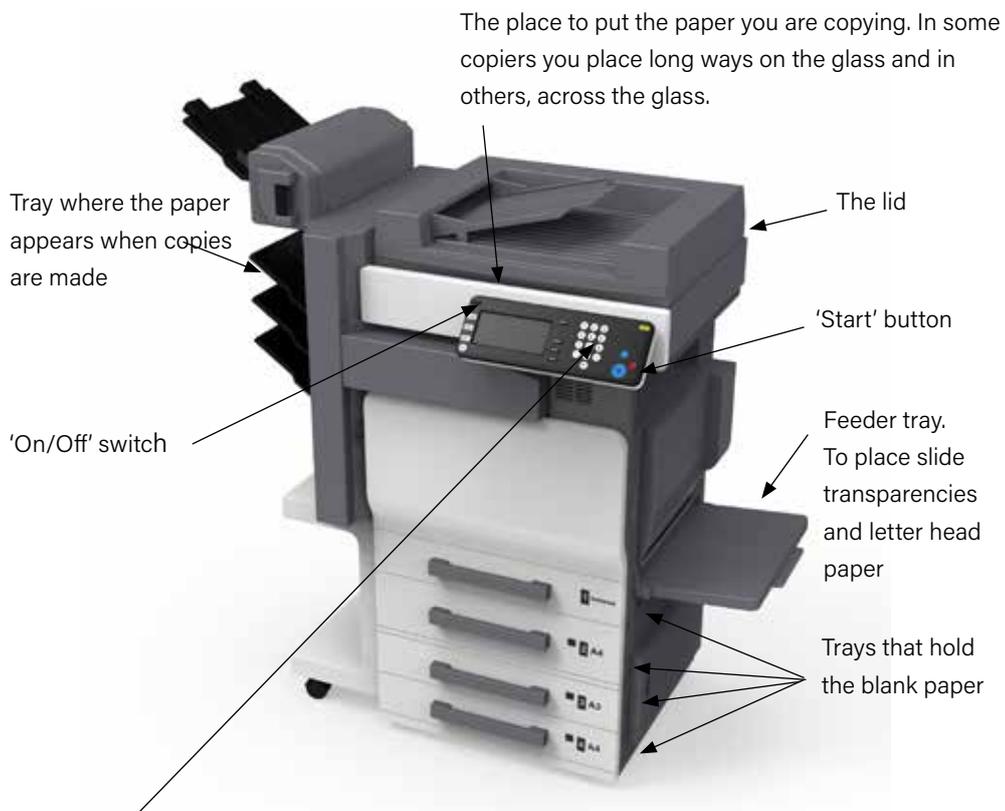
For example, the power switch may be on the front of one machine but at the back on another. Some photocopiers have a touch screen instead of push buttons and all you do is press the function you want to perform.

You need to understand all the parts of your organisation's photocopier.

Example

A photocopier with the main parts labelled

Below is an example of a photocopier that is used in an office workplace.



The buttons for selecting the types of copies you want, e.g. for copying on both sides of the paper, how many copies you want, what size paper you need. There are also buttons you can press to make the copies lighter or darker or bigger or smaller.

What can a photocopier do?

Some photocopiers work at high speed and can produce many copies in seconds while others are much slower. Some have a wide range of features, including colour photocopying while other models are basic and can only perform simple copying tasks.

Most photocopiers can:

- Make single copies.
- Make copies on both sides of the paper.
- Make copies larger or smaller than the original.
- Sort the copies into piles, this is known as collating.
- Staple the copies.
- Copy onto different sizes of paper, such as A4 and A3.

All photocopiers require consumables to be checked and refilled at regular intervals. For example if you used coloured paper or company letterhead for your task, when you have finished refill the copier with white paper ready for the next person to use.

Photocopying terminology

When someone at work asks you to do a photocopying task, you need to be able to understand the words they use.

Below are some common photocopying terms, or words, and their meanings.

Double-sided

These are copies made on both sides of the paper.

Collate

This is another word for 'sort'. If you are making more than one copy of a document with multiple pages, you can press the 'sort' or 'collate' button. Then the photocopier will organise the sheets of paper into a complete document.

Enlarge

This makes the copy bigger than the original. The button is sometimes called 'Zoom'.

Reduce

This makes the copy smaller than the original. The button is sometimes called 'Minimise'.

Cassette

This is the tray that holds the paper.

Paper jam

This is when paper gets stuck in the photocopier and stops it from operating.

Serial number

This is the number the manufacturer has given to identify that particular model of machine. You have to give it to the person who services the photocopier. It is usually found on a label under the glass plate or on the lid.

Operating a photocopier

Before you begin copying, make sure the area is clean and clear of any mess.

Be sure you understand the job you are being asked to do. Listen carefully or read your instructions carefully.

You should know:

- how many copies you have to make
- the paper size you are copying onto

- | |
|---|
| <ul style="list-style-type: none">• whether you are doing single-sided or double-sided copies |
| <ul style="list-style-type: none">• whether the copies need to be collated |
| <ul style="list-style-type: none">• if the copies should be stapled. |

When you are ready to start, lay the paper the correct way on the glass. In most photocopiers, the text to copy must be face down on the glass. Find out which way the paper should be positioned on the glass. This will depend on the model of photocopier. If you are copying a document with multiple pages then you may need to use the paper feeder. This is generally on top of the machine but, again, may differ depending on the model of photocopier.

Select the correct buttons and press them.

If you are unsure of anything, always ask your supervisor or another staff member.

Using a printer

A printer is a machine linked to a computer or to several computers. In an office, staff may have their own personal printer or share one with other staff members. Some offices have a combined printer/photocopier machine. You can use the printer to make copies of documents you have created on the computer.

There are many kinds of printers. Some produce a very high-quality print while others produce a copy that is not as well defined. They work at different speeds and some print in colour, others only in black and white. The kind of printer in your workplace will depend on the type of work the organisation does.

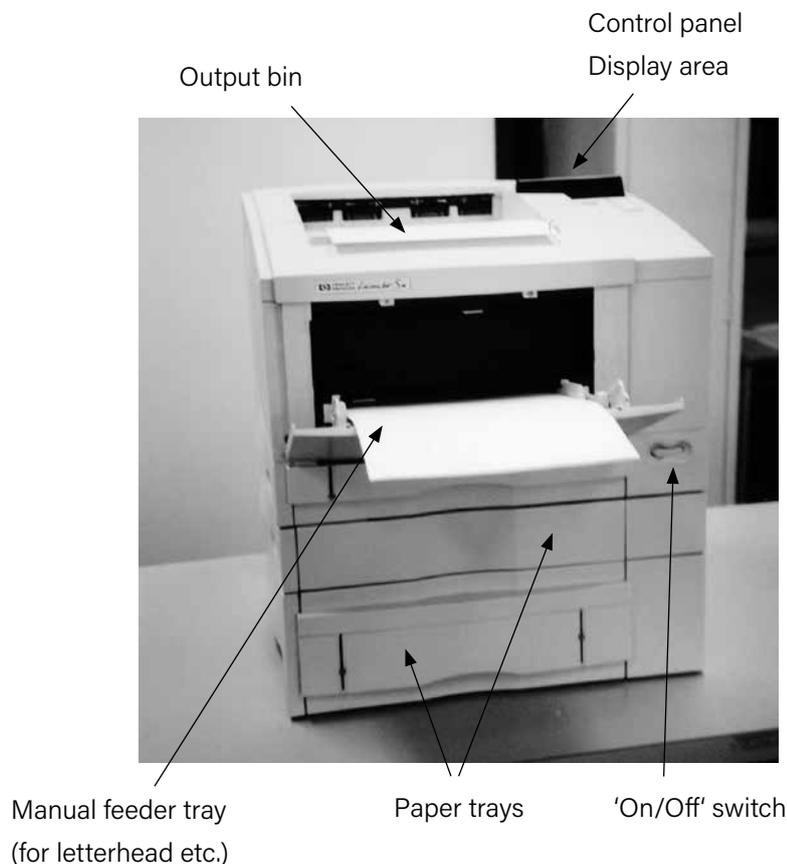
You need to know how to print from your computer and what your printer can do.

Basic parts of a printer

Printers all have similar features, but these may be located in different places on different brands and models of machines.

Some offices have a number of different printers which may be capable of performing different functions.

Below is a typical office printer.



What does a printer do?

There are many different types of printers. The main types are laser and inkjet printers. The main difference between these is the quality of the printed copy. Laser printers normally provide the best results.

Most printers are capable of:

- printing a copy of a document written using computer software such as Word
- printing only some, selected, pages of a document
- printing coloured documents
- printing as many copies as you need.

Printer terminology

If you are unsure of any of the printing terms used, ask your supervisor or another staff member to explain them to you.

Some common terms and their meanings are shown below.

Job cancel

This is a key that stops printing of a job. Find out where this key is in case you make a mistake when you select the page numbers or the number of copies you need.

Manual feed

This is when you feed paper into the printer by hand, rather than paper being automatically fed from one of the trays. You may do this if you are printing onto letterhead, card or transparencies.

Letterhead paper

This is official paper used for business letters that has the organisation's logo, name and address printed on it.

Operating a printer

When you need to print a document make sure you are following instructions correctly.

Once you know what you are being asked to do, follow your computer's printing commands. These will vary depend on the type of program you are printing from.

Most programs allow you to:

- choose the number of copies you want to print
- print only a few of the pages of a large document
- print a specific page
- cancel the print job.

You need to check your work before printing, to make sure that it fits on the page and there are no mistakes. If you do not do this, you might have to print it again.

Use the 'print preview' command in the drop-down file menu in your word processing program. This shows you what your document will look like when it is printed.

You can usually make the copy much larger so you can look more closely at something.

Using a telephone system

One of the first things you may be expected to learn in a new job is how to use the organisation's telephone system.

Many businesses use physical cable phone lines but some use VoIP (voice over internet protocol) technology which provides the same services as phone lines but through the internet.



Basic parts of a telephone system

There are many different types of telephone systems. What is the best type of system for your organisation will depend on the number of people, the size and the kind of business it operates.

In some organisations, a telephone call may go directly to the phone on a person's desk. This is called direct dialling.

In other organisations, the call may go to a switchboard or administration person first. This person screens and directs calls and takes messages or transfers the call to the right person. In this system, each person's phone has an individual extension number.

In a large organisation, the telephone system may have hundreds of phones and many calls can be sent and received at the same time.

Example

The phone system in Belinda's workplace

Each staff member at Bayside Shire Council has their own phone and extension number. Belinda's extension number is 263 and her supervisor's is 260.

When a phone call comes in, the admin staff greets the caller and puts them on hold.

The staff then dials the extension number of the staff member the call is for. They tell this staff member who is calling and what line number the call is on.

The staff member then presses the correct line number on their own phone to take the call.

What does a telephone system do?

Most telephone systems allow you to:

- make a call to someone in the workplace
- make a call to someone outside the workplace

- transfer a call to someone in the workplace
- put a call on hold
- play music while the caller is waiting
- record messages when no-one is available to answer.

Example

Belinda uses the answering machine

Belinda is responsible for turning on the office answering machine at the end of the day. When the office is closed people will hear a recorded message and they can leave a message.

The recorded message says, 'You have called the offices of Bayside Shire Council. Office hours are from 8.30am to 5.30pm. Please leave a message after the tone. Someone will return your call as soon as possible. Thank you for calling'.

Every morning, Belinda listens to any messages that have been left. She writes down the details and makes sure the relevant staff members get their messages delivered.

Telephone terminology

The following is a list of terms most commonly used about telephone systems.

Extension

This is a staff member's individual number. If a call goes to the main switchboard first, the receptionist calls the staff member on their extension number.

For example, an organisation's number might be 8831 2257 and an extension number might be 109.

On hold

This is when a call is kept in the system until it can be connected to the right person.

Transfer

This is when the receptionist sends a call from the main switchboard to the person who has been called.

Hands-free

This is when talking on the phone using a small speaker and microphone, usually worn on your head like over ear headphones, so there is no need to hold the phone receiver.

Conference call

This is when people in different locations have a meeting linked by telecommunications equipment, such as a phone handset with speaker phone.

Line

A line is what connects one phone system to another, whether to other people in the business or when making an outside call. You can press a key and when you hear a dial tone, you can dial the number for your call.

Operating a telephone system

Most staff members have a telephone at their desk. When you start work, your supervisor will explain how to use the telephone system. Most organisations require that customers are not left waiting for longer than three rings.

You may be expected to help answer the phones. Messages left by callers are sometimes hard to understand as often people do not speak clearly when they leave a message. You can always play the message several times and once you are sure you have written down all parts of a message correctly, you can delete it.

Example

Taking messages

It is Belinda's responsibility to write down the messages left on the answering machine overnight and deliver them to the correct people.

Belinda selects 'play' and writes down each message as she hears it. When she has finished, she presses 'delete' and the messages are removed from the answering machine.

Belinda uses a message notepad to write down the information.

Here are two messages Belinda takes from the answering machine on Friday 11th July.

While you were out	
Date: 11/7	Time:
For: Joe Santosini	From: Mrs Stacey
Phone # 1111 2222	
<input type="checkbox"/> Telephoned	<input type="checkbox"/> Please call
<input type="checkbox"/> Wants to see you	<input type="checkbox"/> Will call again
<input type="checkbox"/> Returned your call	<input type="checkbox"/> URGENT
<input type="checkbox"/> Was here to see you	

Taking messages continued...

While you were out

Message: Mrs Stacey said the dog from next door was barking again last night.

Message taken by:

While you were out

Date: 11/7

Time:

For: Claire

From: Jill Stanton

Phone # 1111 2222

Telephoned

Please call

Wants to see you

Will call again

Returned your call

URGENT

Was here to see you

Message: Jill Stanton rang to ask about what kind of fence she has to put around her backyard swimming pool.

Message taken by:

Safely operating a shredder

Workplaces often produce confidential documents that contain information that is private to the organisation or to its customers. If they are being thrown away, the workplace cannot risk anyone finding and reading them.

A shredder machine cuts these documents into very thin strips so they cannot be read or stuck back together. Then the paper strips are put into the rubbish or recycling bin.

There are many different kinds of shredders.

Always follow safety procedures when operating a shredder and be very careful. Keep your hair and clothes away from the shredder as they could get caught in the machine. Do not put your hands too close to the slot where you place the paper.

Always double check with your supervisor that you are shredding the correct documents before you start.

Here is more about using a shredder.

How to use a shredding machine	
Step 1	Turn the shredder on.
Step 2	Take a few pages at a time and feed them slowly into the machine. Generally, you should only try to shred about five pages at the same time.
Step 3	The machine will cut them into narrow strips.
Step 4	When the attached bin is full of shredded paper, turn the shredder off and lift the top off. Do this carefully because the top may be heavy.
Step 5	Empty the bin into the recycling bin or rubbish bin as instructed.

Practice Task 3

Question 1

Samir needs to choose the correct equipment for each of the tasks he has been given by his supervisor. Match each piece of business equipment with the correct task.

- | | |
|---------------|--|
| » Telephone | » Make 10 booklets with a staple in the top right-hand corner. |
| » Shredder | » I will send you an email with a document. Make 10 copies of pages 3, 5, and 7. |
| » Photocopier | » Dispose of these private documents. |
| » Printer | » What messages did I receive while I was out of the office? |

Question 2

Select true or false for the following.

- The terms hands free, extension and on hold relate to the use of a telephone. » True » False

2B Take action and report issues

Using machines and equipment safely is an important part of workplace health safety laws. All workers are responsible for keeping themselves and other staff safe.

If a piece of equipment is not working, you need to know if you are allowed to try to mend it or whether you should report the fault. For example, if a message on an answering machine gets erased, then your supervisor will need to know.

You may be given some training on how to fix minor faults, but you should not try to fix a fault without first getting approval from your supervisor. Never use sharp objects like paper clips, scissors and staples with machinery. Never poke a sharp object inside a machine or allow objects to get caught inside a machine and make it break down.

Examples of minor faults with a photocopier include:

- clearing the machine if paper gets stuck
- cleaning the surfaces, such as the glass plate of the printer.

After some experience you may know how to fix a minor fault. This is called troubleshooting.

Information on troubleshooting simple faults can be found in the operational manual. Faults may be shown by lights that flash red to indicate a problem or there might be a screen with information or an error code that flashes to indicate a particular problem.

For example, a printer might flash a code '02' when it stops working. When you look up the code in the manual, you will read:

An issue with the driver or printer cable. Turn the printer off and on and the error message should disappear. If the error message persists there may be a hardware problem.

Fixing a fault means you need to follow the instructions in the correct order.

Following shutdown procedures

Some machines, such as computers and some printers and photocopiers, require you to follow certain steps when shutting them down. This allows the machine to go through a programmed sequence of steps so information can be stored and to prepare for the next start-up.

In other cases, shutdown procedures may be required to protect sensitive parts from damage due to overheating such as the fan needs to keep running so the motor can cool down.

Once again, follow the manufacturer's instructions, or your workplace procedures, for shutdown. If you are uncertain, contact the person responsible for maintaining the equipment or talk to your supervisor.

Reporting shortages and faults

Many faults need to be referred to a supervisor or other experienced staff member. In the case of a fault causing an injury, then this needs to be reported to the workplace health safety officer as well as your supervisor.

Reporting may just be informing the person in charge about a fault, but it might also require that you write a report of the fault. This may be via email or in a logbook kept near the equipment. Your supervisor will explain the procedure for reporting faults that are outside your responsibility, including to whom, and how, a fault should be reported.

In many cases the equipment can be 'isolated' by leaving a visible note saying it must not be used due to a fault.

You may have been shown where the consumables stores are located and have permission to re-stock cupboards or equipment when they run out. When stocks are running low, it may be your responsibility to tell the person in charge of purchasing, or your supervisor.

Most businesses do not allow stocks of consumables to get too low otherwise tasks might be delayed while waiting for a delivery. Many businesses do one larger order for their office supplies, rather than more frequent smaller orders, and store the surplus.

The following table lists some common machinery faults and outlines how to rectify them:

<p>Photocopier faults</p>	<p>A photocopier will stop working if a piece of paper becomes stuck inside the machine. This may be due to the paper not being loaded in the tray correctly or pages being stuck together.</p> <ul style="list-style-type: none"> ▪ A message will flash in the display area, telling you in which part of the machine the paper is stuck. ▪ Instructions for clearing paper jams are usually written on the inside of the photocopier. ▪ If you cannot find the trapped paper, ask for help. ▪ Remove the paper very slowly. ▪ Do not pull the paper hard, because it could tear. If it does tear, part of the paper might get stuck in the machine and be hard to remove.
<p>Printing faults</p>	<ul style="list-style-type: none"> ▪ You may need to cancel the printing. For example, you wanted to print only one page of a 20 page document, but you accidentally selected for the whole document to be printed. How you cancel a print job is different for different types of printers. You may be able to go to the printer and press the 'cancel' button or you may be able to stop the printing from your computer. You need to find out how to do this. ▪ You may need to remove a paper jam. A message saying 'remove paper' or similar will appear in the screen area on the printer or on the computer. Paper jams often occur when the paper is placed incorrectly in the tray. Usually you remove the tray and carefully take out the paper that is stuck. If you have to open the back cover to remove the paper be careful, as this area may be very hot.
<p>Telephone faults</p>	<p>When major faults occur, your organisation will contact the telephone company or their IT staff.</p>
<p>Shedder faults</p>	<p>If you try to put too many pages into the machine at one time, the shredding machine may jam.</p> <p>Use the 'reverse' button to help clear the jam. If you have to try to release any paper by hand, always turn the power off first.</p> <p>Always empty the bin when you see it is full. The shredder will not work properly if the bin is full of shredded paper.</p>

Practice Task 4

Question 1

Which of the following statements relate to resource shortages or faults in equipment?

Tick all that apply.

- Check with your supervisor before you try to fix a fault in a machine.
- Troubleshooting means trying to identify the problem such as an error code or flashing light.
- You may be responsible for reporting when stocks of consumables are running low.
- Most businesses will stop work while they wait for a delivery of consumables.
- You should be able to fix a fault in a telephone system.

Question 2

Give two examples of when you should report an issue with equipment or a stock shortage to your supervisor?

Summary

- An instruction manual has diagrams or images with step by step instructions that show how to use business equipment.
- Your supervisor will demonstrate how to use equipment until you are confident you can operate it and complete the task on your own
- You may need to answer questions on the various steps needed to complete a task.
- Business equipment differs according to the make and model, but most have similar features.
- You need to know what faults you can fix yourself and what problems you must report to someone else.
- Do not try to fix a fault yourself without approval from your supervisor.
- Some machines require certain steps to be followed when being shut down.
- When stocks are running low, you may have the responsibility to tell the person in charge of purchasing, or your supervisor.

Learning Checkpoint 2

Operate resources

Read case study 1, then answer the question that follows.

Case study 1

Belinda's supervisor has sent a five-page document called 'Bayside Shire Council Report' to her computer and asked her to print five single-sided copies of pages 1, 3, and 5 on A3 paper. Before she prints the document, she checks she has selected the correct print information. Here is what she saw:

- Belinda decides she can go ahead and print. Which of the following are true? Tick all that apply.
 - Belinda has selected the correct number of copies.
 - Belinda has selected the correct pages to print.
 - Belinda has chosen the print one-sided option.
 - Belinda has chosen the correct paper size.
 - Belinda has chosen colour paper.



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

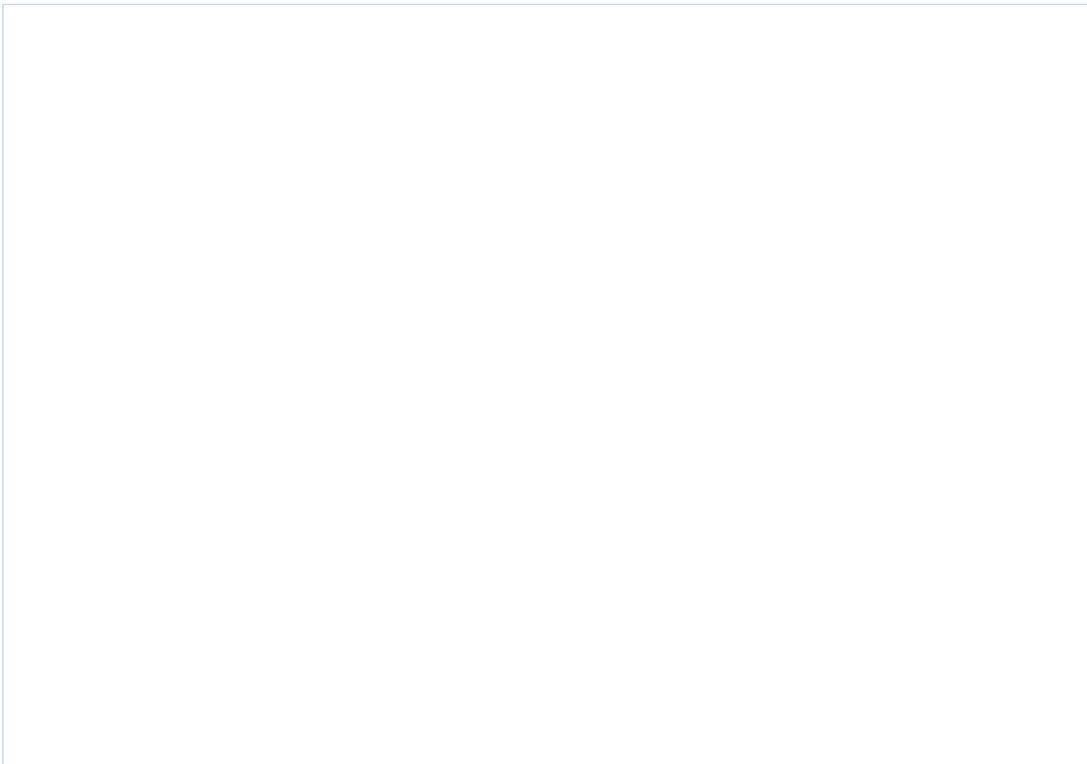
Case study 2

Belinda was worried because she had only one hour to complete a photocopying task. She had to make 30 copies of a 50-page booklet and the paper jammed in the machine. The warning light on the photocopier was flashing. She opened the door of the photocopier but could not see any trapped paper. She called Philip, the equipment officer. He showed her where the paper was jammed and how to wind the roller to release the paper. She continued the job but after 10 more copies the paper got jammed again. She opened the door again, saw the paper and pulled it out without winding the roller as she had been shown. The paper tore, so she quickly put it into the bin. Some bits of the paper were still stuck inside the photocopier. Belinda shut the door and pressed the 'start' button, but nothing happened.

1. Which of the following statements relate to Belinda's actions? Tick all that apply.

- Belinda should have followed the instructions given by Philip.
- Belinda should have asked Phillip to help with the second paper jam.
- Belinda should have pulled harder on the paper jammed in the machine.
- Belinda should have left the machine for the next person to fix.

2. Belinda's supervisor wants her to check the supply levels in the consumables cupboards. Why is it important to check for shortages in resources such as consumables?





Topic 3 | Maintain resources

- 3A Identify and undertake maintenance requirements
- 3B Maintain resource records
- 3C Store resources

3A Identify and undertake maintenance requirements

Resources used in a business work better and last for longer if they are well looked after.

Equipment and resources that are carefully maintained can be used when required and have fewer issues with faults. This means the workplace runs more efficiently, saving time and money. Staff do not have to wait for repairs to be done and jobs are not delayed because of the workplace running out of resources.

Identifying maintenance requirements

It may be obvious if resources are in short supply or equipment is faulty. You might see that there are problems when you carry out the pre-use checklist, or if another staff member sends around an email about broken machines or equipment.

Your supervisor will tell you what you need to do to maintain resources and there may be a list of things you have to do when maintenance is required.

All maintenance must be done according to the manufacturer's instructions. You should know where the instruction manuals for each machine are stored. Always follow the instructions in the manual, because different brands of machines have different maintenance requirements.

Some of the maintenance work must be done by a service company or the warranty requirements will be breached. The manufacturer will have provided a list of approved service companies.

Everyone who uses resources is responsible for keeping office equipment clean.

You can wipe a soft brush or cloth over equipment and consumables that you know a lot of people have touched, such as pens on a desk used by both customers and staff. A multipurpose spray can be used to remove dust.

Use the recommended cleaning materials. Make sure you know where cleaning equipment is kept and return it after use for the next person to use.

Some of the reasons that equipment should be kept clean are shown below.

Reasons for keeping equipment and resources clean

- Clean equipment works better and last longer.
- Spilled liquid is dangerous around electrical equipment.
- Dirty resources with spilled food or drink are not pleasant to work with.
- Dirt on equipment gives a bad impression to other people such as customers.
- Clean equipment is easier to maintain and to identify problems with.

Maintaining a photocopier

Make sure metal materials such as staples, scissors or paper clips are kept away from moving parts. Never place liquids, such as coffee, food or glue, on top of equipment.

Keep the glass plate clean with a soft cloth and only use recommended special cleaners for this task. Never use ordinary kitchen cleaner as it can scratch the surface or leave smudges.

The toner cartridge must be correctly placed into the copier. Toner powder is poisonous, so you should wear gloves and take care when handling the cartridges. You may be trained to do this task, or a more experienced person may do it.

You must place the old toner cartridge back into its box. The supplier that replaces the toner will collect it. Used toner cartridges are usually recycled.

Example

Simple maintenance of a photocopier

When photocopying a document, Belinda notices that the copies are coming out with a black smudge. The document looks messy and she is not happy with it. She looks at the procedure for cleaning the equipment.

Her supervisor had told Belinda it is important to make sure the glass plate on the photocopier is kept clean. She said that sometimes people use the wrong cleaner and when it dries it leaves smudges.

There is a cleaning kit in the cupboard which contains a special spray and cloth for cleaning dust off the glass.

Belinda uses the cloth to rub some of the spray on the glass and the smudge disappears. Her copies now come out perfectly.

She decides to check the glass plate regularly and clean it at least once a week.

Maintaining a printer

If you are responsible for keeping the printer clean, follow the instructions in the manufacturer's manual or instructions your supervisor gives you.

Always turn the printer off and unplug the power cord before you begin. Clean the outside with a damp cloth and the inside with a dry cloth.

Replace the toner when the level is getting low. On most printers, a message will appear in the display area saying 'toner is low' or a flashing light will indicate a service by a technician is required.

You should either replace the toner yourself, following the instructions you have been given, or tell the person in charge of doing this that it needs to be done.

Maintaining other equipment

There are cleaning pads available for telephones. You should keep your own phone clean by wiping it regularly with one of these pads or with a clean, damp cloth. Phones that are shared with others, such as at a front desk, should be wiped frequently.

Make sure you follow the policies and procedures in your organisation for the shutdown of office machines and business equipment.

Return equipment to the correct place when you have finished a task. Make sure it is stored so that it will not be damaged by other nearby objects.

Practice Task 5

Question 1

Which of the following statements relate to maintenance of resources? Tick all that apply.

- Staff should be patient and learn to wait when resources have run out.
- Resources that are carefully maintained have fewer issues with faults.
- Maintenance must be done according to the manufacturer's instructions.
- Clean equipment is easier to maintain.
- Equipment that requires maintenance is dangerous.

3B Maintain resources records

Most organisations have a resources maintenance program. Frequent checks are made to ensure equipment is in good working order and that when supplies of consumables get low, they are re-ordered.

As you now know, maintenance includes cleaning, adding toner, replacing paper and making sure an experienced technician regularly services equipment. It also involves checking supply levels of consumables such as paper, toner and cleaning products and ordering new supplies when stocks are running low. A record of the number and types of consumables kept at the business can be used to identify when stock is running low and new supplies need to be ordered.

A checklist is a good way to record when maintenance has been done.

Example

Maintenance checklist

This is the maintenance checklist that Belinda uses at Bayside Shire Council for its office equipment.

Office equipment - maintenance checklist	
Photocopier	<ul style="list-style-type: none"> Check paper regularly. Make sure paper is separated before placing in tray. Replace toner cartridge when necessary. Store used toner cartridge in correct box. Clean glass plate regularly. Ensure machine is free from dust by cleaning weekly.
Printer	<ul style="list-style-type: none"> Make sure paper is separated before placing in tray. Replace toner cartridge when necessary. Clean wires with cleaning brush every week.

Equipment servicing

Companies that supply office equipment, especially photocopiers, sometimes have a maintenance contract with the organisation. This is known as 'servicing the photocopier'. A technician from the servicing company visits the organisation to clean and check the machine on a regular basis. The organisation does not have to pay for a service while the equipment is under warranty.

The person responsible for office equipment generally records the details in a logbook. This helps the organisation know that the equipment is being well looked after.

For example, most photocopiers need to be serviced every six months or after they have made 10,000 copies.

You may be asked to call the service company to arrange a time for them to come. You will need to look up the details about the machine when you call the company to ask them to come and fix a problem. They will ask you for some information about the equipment, such as:

- make of the equipment or machine
- model of the machine such as a serial number
- warranty details, if it is under warranty.

When equipment is purchased, it usually comes with a warranty that states that if the equipment breaks down within a certain time period, such as 12 or 24 months, a technician will come and repair it without charging for the call-out or for parts

Your supervisor will be able to help you find the serial numbers on a machine.

Example

A record of the office equipment

Below is a list of equipment and the details for each item, which has been prepared by Belinda for the Bayside Shire Council office.

Record of equipment			
Equipment	Make and model number	Serial number	Service department contact details
Multifunction copier/printer	Konica 2125	1304555	Konica Servicing Department 58990000
Scanner	Fuji Xerox	DocuMate 4799	Xerox Servicing Department 56890000
Printer	Hewlett Packard Colour LaserJet	ProM479dw	Stacey's Printers 88860000
Telephone	NEC	SL2100	Telstra 98000000

Record keeping

An organisation needs to know exact details about the number and value of their resources. This information is used for budgeting and taxation. A record that lists the value of equipment is called an 'asset register'.

A record also needs to be kept of the number and types of consumables the organisation has. This is used when doing a stocktake by counting the amount of goods on hand and calculating their estimated value.

Your supervisor may give you the job of counting the supplies during a stocktake.

Other records may list the service and repair history of a machine and may include dates of cleaning and maintenance schedules. This information is often kept in a logbook or computer record.

For example, if the photocopier has been serviced, the logbook records:

- how many copies have been made to date on the copier
- the dates the machine has been serviced, cleaned and repaired
- the signature of the technician who has carried out the service.

Example

Complete an order form for new supplies

Belinda's supervisor has asked her to organise an order of consumable items for each department at Bayside Shire Council.

Belinda makes a list of items available from the supplier and sends it to each department leader. She requests that completed order forms are returned to her by the end of the week so she can collate the orders into one list and give it to her supervisor to arrange for a purchase order to be sent to the supplier and a delivery arranged.

Practice Task 6

Select true or false for each of the following.

Question 1

Some organisations have a contract with a supplier to maintain equipment. » True » False

Question 2

You should be able to remember the service and fault history of equipment you have used. » True » False

Question 3

A record of the number, type and value of equipment and consumables is called an asset register. » True » False

3C Store resources

Some organisations may have an equipment cupboard or a room used specifically for storing equipment, machines, consumables and instruction documents, such as operating manuals.

Check with your supervisor where equipment is stored and how it should be left when you have completed a task. Documents used most frequently by a business will be stored in folders on computers or in a database. Hard copy documents will be stored in a filing cabinet. You may need to ask a supervisor for permission to access documents or for the key to unlock the cabinet to find a document you need.

Many offices keep consumable resources in cupboards or in a separate storeroom. When a supplier delivers resources, someone must check that the supplies delivered match what was ordered. This may be your responsibility. You will need a copy of the purchase order and a copy of the delivery form. As you unpack the delivery, you must check that everything that was ordered is there.

Paper must be stored in a cool, dry place as air that is too warm or moist will make the paper curl. Paper that is not flat will not slide through the machines smoothly and can cause a paper jam.

Toner cartridges also need to be stored in a cool, dry place and the cartridge boxes have storage instructions.

Consumables that are used frequently such as stationery items are usually kept in cupboards so they can be easily accessed.

Work health safety

Safety can be an issue when storing resources.

It may be your job to look after stock when it is delivered to the office so make sure you know where and how it is to be stored. For example, you may have to use a trolley to deliver stacks of paper to several different departments. Make sure you know the procedures for lifting and moving heavy boxes and for using ladders or steps to access and store items.

Here are some aspects of work health safety that you need to know about.

Boxes



Heavy boxes should never be stored at a height where staff have to reach up to get them. They also should not be stored too low because if staff have to lean down to pick up heavy items this can cause back strain.

If there are heavy boxes on the floor, take out small amounts of material each time. Do not try to lift heavy boxes. If you cannot avoid some lifting, always bend your knees before you lift or get someone to help you.

Some businesses may supply special equipment such as trolleys or hoists for moving and lifting heavy items.

Paper supply



A lot of paper can be used in an office. Reams of paper can be stored on shelves at elbow height close to photocopying/printing machines. This avoids any need for people to reach or bend, which helps protect their backs.

Cleaning fluids



Keep cleaning fluids in a specified cupboard with a sign on the cupboard door. Make sure there are instructions for their use and provide gloves, cloths and a kit for cleaning up spills.

Toner cartridges



Keep poisonous toner cartridges in their boxes until you need them. Place used cartridges back in their box and place in an area for collection by the supplier.

Practice Task 7

Question 1

Draw a line to match each resource to its recommended storage place.

- | | |
|----------------------------|--------------------------------------|
| » In a recycle bin | » Packets of printer paper. |
| » Flat in a cool dry place | » Boxes containing heavy stationery. |
| » On the middle shelf | » Cleaning products. |
| » Hard copy documents | » Used toner cartridges. |
| » In a labelled cupboard | » Three drawer filing cabinet. |

Summary

- Business equipment must be maintained so that it works efficiently, develops less faults and lasts longer.
- Maintenance includes cleaning and servicing.
- Maintenance must be done according to the manufacturer's instructions.
- Records of resources can include details of equipment, an asset register, purchasing orders, delivery dockets, logbooks and stock taking lists.
- Equipment and resources should be stored in a safe area with easy access.

Learning Checkpoint 3

Maintain resources

- List two places you could find information on how to maintain a machine or piece of equipment.

- Read the following information listing the faults that occurred in equipment in an office.
 - Konica multifunction printer/photocopier broke down on 4.4.21. A staple was caught and nobody could fix it. Called for a technician. The fault was fixed on 6.4.21.
 - Scanner was producing bad images with a dark patch on the page. Glass was cleaned. It is now working correctly. 21.8.21.
 - Hewlett Packard Printer would not print and had an error code 02. A sticky label was caught on the drum on 9.9.21. Called for a technician. The fault was fixed on 10.9.21.
 - Read the record of equipment list containing information about the equipment in the office.

Record of equipment			
Equipment	Make and model number	Serial number	Service department phone number
Multifunction copier/printer	Konica 2125	1304555	Konica Servicing Department 58990000
Scanner	Fuji Xerox	DocuMate 4799	Xerox Servicing Department 56890000
Printer	Hewlett Packard Colour LaserJet	ProM479dw	Stacey's Printers 88860000

Fill in the logbook table below with the information on the faults and actions taken. You will find the serial number for each piece of equipment in the record of equipment above.

Record of equipment faults					
Date	Type of machine	Make and model number	Serial number	Fault	Action taken

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

Case study

The organisation you work for has just moved to a new building. It is an open-plan office, meaning that people work in a big, open space. There is a small room for the photocopier and the office consumables.

- Which of the following do you need to consider when deciding where to store the office resources? Tick all that apply.
 - The heavy boxes of paper can go on the top shelf.
 - The pens and pencils can be placed in the top drawer of the filing cabinet.
 - The instruction manuals can be filed in the filing cabinet.
 - The cleaning equipment should be stored separately or in a labelled cupboard.
 - The toner for the photocopier can be placed next to the machine.