BSB 7.0

BSBINS302

ORGANISE WORKPLACE INFORMATION

Aspire Learning Resources

BSBINS302

Organise workplace information

Release 1

Learner Guide

Aspire version 1.2

Learning Resources

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Release 1, version 1.1	March 2021	First release
Release 1, version 1.2	April 2021	Fixed typos on pp 14, 32. Updated table content on page 15. Removed Heading *Check currency information* and following paragraph on p 16. Updated information management systems table and Knowledge management system table on page 38. Updated first two response examples from Practice Task 5, Q1 on page 46.

Aspire is committed to developing quality resources that meet the needs of our customers. However, occasionally Aspire finds, or is notified of, errors. Please refer to our website at www.aspirelr.com.au to see if there are any updates that may be relevant to you.

BSBINS302 Organise workplace information, Release 1

Level 1, 464 St Kilda Road
MELBOURNE VIC 3004 AUSTRALIA
Phone: (03) 9820 1300

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Contact details

Participant
Name:
Start date:
Phone number:
Email:
Work location
Name:
Address:
Postal address:
Workplace supervisor name:
Phone number:
Fax:
Email:
Registered Training Organisation (RTO)
Name:
Address:
Postal address (if different):
Phone number:
Fax:
RTO contact name:
Mobile:
Email:

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Before you begin

This Learner Guide is based on the unit of competency *BSBINS302 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	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	▪ 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	▪ Collects information by listening and questioning ▪ Participates in a verbal exchange using clear language to contribute information and convey issues
Self-management	▪ Understands rights and responsibilities and complies with explicit policies and procedures and legal and regulatory requirements
Teamwork	▪ Complies with work instructions and contributes to work group discussions using accepted conventions
Planning and organising	▪ Plans and implements routine tasks and workload making decisions about sequencing and timing
Technology	▪ Uses digital technology to access and record information and to communicate with others
Problem solving	▪ Makes low impact decisions within familiar situations, based on a range of predefined or routine solutions, and evaluates the effectiveness of the outcome

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: Receive, acquire and assess information	1A Check and gather information	❑ Confident ❑ Basic understanding ❑ Not confident
	1B Check information for clarity, accuracy, currency and relevance	❑ Confident ❑ Basic understanding ❑ Not confident
	1C Access additional information from stakeholders	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 2: Organise information	2A Organise information in a format suitable for analysis and distribution	❑ Confident ❑ Basic understanding ❑ Not confident
	2B Store information using systems and technology	❑ Confident ❑ Basic understanding ❑ Not confident
	2C Distribute information to stakeholders	❑ Confident ❑ Basic understanding ❑ Not confident
	2D Identify difficulties with accessing information and work collaboratively to solve them	❑ Confident ❑ Basic understanding ❑ Not confident
Topic 3: Review information needs	3A Seek feedback on clarity, accuracy and sufficiency of information	❑ Confident ❑ Basic understanding ❑ Not confident
	3B Review feedback and suggest updates to information processes	❑ Confident ❑ Basic understanding ❑ Not confident
	3C Document future information needs and suggest modifications to processes	❑ Confident ❑ Basic understanding ❑ Not confident

Topic 1 | Receive, acquire and assess information

1A Check and gather information

1B Check information for clarity, accuracy, currency and relevance

1C Access additional information from stakeholders

1A Check and gather information

Accurate and current information is used by businesses for nearly every aspect of its operations.

Information management means the information stored and maintained by a business can be accessed and distributed when required.

Business information is used for every operation carried out by business. It can be stored as records or different types of documents using various forms of information management systems. Staff need to be able to find the relevant and up to date information they need so the business can operate productively without unnecessary hold-ups.

Policies and procedures related to workplace information

Teams and departments require different types or levels of information to do their job.

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. Procedures are developed to help staff understand the actions or steps they need to take to uphold the policy.

You will need to understand and follow your organisations policies and procedures related to the access and use of information. These requirements can be accessed from a policy manual or the staff portal (Intranet). Conforming to policies and procedures will ensure you are able to complete your work in an efficient and timely manner. It is very frustrating to spend hours working on searching for information, only to find it does not meet requirements of the task or it is out of date. Ask your supervisor if you are unsure what policies and procedures you must follow when receiving and accessing information in your job role.

Here are examples of rules you may need to confirm before handling information:

- *Request a Delivery Receipt or Request a Read Receipt* in an email when sending information to an external stakeholder
- seek permission before sending potentially commercially sensitive information to a competitor or to someone external to the business.
- seek permission before sharing another person's personal information to others in the organisation.
- never distribute or forward discriminatory comments about another person.

- follow procedures for reporting a complaint or issue at work to a supervisor.
- don't use your work email or social media accounts for personal use or to share an opinion.

Each business will use a different name for their policies and procedures.

Here are some examples of policies and procedures that relate to the correct access, use and storage of information:

- Privacy policy
- Communication policy and procedures
- Protecting commercially sensitive information policy
- Information technology policy
- Information management policy and procedures
- Knowledge management policy and procedures
- Copyright policy
- Anti-discrimination policy
- Internet usage policy
- Social medial usage policy
- Staff email or computer usage policy
- Confidentiality policy
- Code of conduct policy
- Complaints policy
- Customer service policy and procedure
- Document control procedures
- File naming procedures

Comply with information privacy laws

Information protection laws determine the access and use of workplace information.

The *Privacy Act 1988* (Cth), provides rules about how information can be handled, and organisations must make sure that their policies and procedures meet these requirements. The key objective of the Act is to protect the personal and sensitive information of individual's when handled by government agencies and most private sector organisations (business).

The Act describes 13 Australian Privacy Principles (APPs) that govern how personal and sensitive information is collected, used, disclosed, managed and maintained. It also provides rights for consumers in when they can choose to remain anonymous and have their information accessed and corrected. This relates to the use of customer information but also the personal information of staff held by a business.

Under the *Privacy Act 1988* (Cth), personal information is regarded as any information which can identify an individual or that can be used to ascertain the identity of the person, for example, names, addresses, telephone numbers, dates of birth, medical records, tax file numbers and passport numbers.

The Act defines sensitive information as any information or opinion about a person's:

- racial or ethnic origin
- political opinions
- membership of a political association
- religious beliefs or affiliations
- philosophical beliefs
- membership of a professional or trade association
- membership of a trade union
- sexual preferences or practices
- criminal record
- medical/health records or history
- genetics.

For more information about the Privacy Act 1988 and the APPs, go to the website of the Office of the Australian Information Commissioner: aspirelr.link/oaic-privacy

Example

Sample information protection policy

BizOps will only collect personal information where the information is necessary to perform its business activities.

The organisation collects information, including personal information, to:

- manage purchase orders, invoicing and accounts
- supply customers with products and services
- plan, develop and promote products and services
- manage customer complaints and gather feedback.

Where possible, the following information will be provided before personal information is collected:

- Why personal information is being collected; particularly if sensitive information is required
- How BizOps will use this information
- How BizOps can be contacted
- How individuals can access their own information
- Who this information will be disclosed to

Types of information

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

Every business will have its own systems for the organisation, storage and access to information. Below is a list of some common categories of information used in business.

Types of information	
Correspondence	Correspondence includes all incoming and outgoing communications from and to a business. This can be emails and hard copy letters. Examples include invoices to customers, quotes from suppliers, orders for products and services, promotional materials, customer feedback and queries etc. These files need to be monitored and acted upon or forwarded to the relevant people. There may be procedures for the saving of correspondence such as a file path using a naming standard and version control such as a date. Some files might need to be stored for several years for taxation or other compliance requirements such as Workplace Health and Safety (WHS).
Forms	Organisations have a range of forms relating to their business. Each department or area of a business will have their own forms. For example, a Human Resources department may use staff feedback forms, surveys, questionnaires, complaint forms, work health and safety incident forms, leave forms, membership forms. etc. a marketing department might use customer feedback and complaints forms.
Operational reports, plans and documentation	Material related to business operations includes various business and strategic plans, risk management plans, budgets/finance plans, minutes of meetings, project reports, monthly and annual reports, board reports, procedures and policies, and manuals for operating equipment. Some legal or financial documents may be regularly sent to appropriate authorities. Copies of reports must be retained for reference and auditing purposes and stored in a secure but accessible way.

Types of information	
Work processes or procedures	These documents provide guidelines for staff to use when completing their work tasks. They may include manuals and operating instructions for the use of equipment or machines. For example, machines such as forklifts or office equipment such as copies. Processes are important aspect of staff training and making sure staff work safely.
Database records	Computer databases are an essential tool for businesses. They store large amounts of information about the operations of a business electronically in one place. Information can be accessed via the business computers by authorised staff to prepare reports to meet organisational requirements such as WHS. An example is a customer database that records customer details, helps a business keep track of current and lapsed clients, records interactions and highlights buying patterns.
Personnel records	Organisations keep a record of personal information about their staff including 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 to those staff who work in the area and have the authority to access the personal information of others. Personnel records may be only accessible by password.
Promotional material	Promotion and marketing materials are an important part of a business. Promotional material may include e-catalogues, brochures, flyers, e-newsletters and journals.

Financial information data

A business will need to regularly access and monitor information about their financial operations. Staff and their managers from different departments require a data to monitor the performance of their operations in each departments or area.

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 will be updated regularly.

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 over a given period. This information is often accessible via the organisation's website or intranet.

Written or verbal information

Written documents can be found as hard-copy, or paper-based documents, records and correspondence. Electronic or soft-copy information are documents and records stored as a file on an electronic database such as a computer in email or from a database. Some information is acquired from verbal communication. It may then need to be shared with others or written down and recorded to become a document.

The table below provides examples of information that can be shared using different methods.

Hard copy	Soft copy	Verbal
▪ Brochure or poster ▪ Safety signs ▪ Policies and procedures stored in a manual ▪ Newsletters ▪ Magazines ▪ Actions from a team meeting documented on a whiteboard.	▪ Emails ▪ Spreadsheets ▪ Budgets ▪ Policies and procedures stored on the intranet ▪ Sales and production targets ▪ Accounting data ▪ Sales and revenue figures ▪ Meeting minutes ▪ Human resources information for staff stored on the company website or the staff portal (Intranet)	▪ Procedures and instructions explained from a supervisor to a team member ▪ Complaints, enquiries or requests from customers received on the phone ▪ Issues raised by supervisors and managers ▪ Safety information or reporting of a workplace incident ▪ Seeking information from others by phone or in a meeting.

Information comes from a variety of sources including from within and outside the organisation. Here are some examples of different sources of information.

Internal sources	External sources
▪ Company portal (Intranet) ▪ Policies and procedures manual ▪ Colleagues and team members ▪ Supervisors and managers ▪ Other teams and departments ▪ Other branches of the business ▪ People on committees ▪ Members of the Board	▪ External websites (Internet) ▪ Customers ▪ Suppliers ▪ Consultants ▪ Other businesses ▪ Government departments ▪ Competitors ▪ Industry associations

Example

Information is used to support its business practices

Below are some examples of how information is used in business:

Analysis	An office supply company was considering buying new software to manage customer orders. Before purchasing anything, they needed information about how orders were currently taken and how the process could be improved. The analysis they conducted was used to decide on the software best suited to the situation and their requirements. They chose software suited to their small business.
Decision-making	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 required for production and the costs involved.
Plans and strategies	Jenny works as a receptionist at a chain-store toy supplier. Over a period of a month, she received several calls from customers asking for a specific electronic game they did not stock. Jenny monitored customer demand using a form she developed to record customer inquiries. She took her research to management, who decided to investigate the product further and decide if it should be added to their product range.

Receive and acquire information

Collecting relevant information requires that you pay attention and work carefully.

Providing the wrong or out of date information can have serious consequences for a business or department. Make sure you follow the policies and procedures that have been shown to you and that you are efficient with your time. Check you understand the tasks required of you with a supervisor. 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
- research competitors' products and services
- research travel and accommodation options
- collect organisational files.

Collecting information according to policies and procedures

Access to various types of information may be restricted to certain employees.

Depending on the information management system used, documents may be downloaded from a network, accessible or shared online via the cloud, sent via email or printed and distributed in hard copy.

More information on collecting and acquiring information are described in more detail below:

Internet

One of the biggest challenges when searching for information from the internet is finding the information you need. Search engines help you find information, but you often find a lot of irrelevant information as you search. This can take up a lot of your time. You need to develop effective search techniques, such as:

- 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 so you can easily find it again.
- Keep a record of the name of the site, author, title, publisher and the date the information was retrieved.

Examples of the types of information you may need to find on the internet might include:

- Information about businesses, products, government departments, people, educational institutions, travel etc
- Discussion, opinion and expertise from government departments, industry experts or professional bodies
- Information about computer programs, software programs or applications
- Services available such as banking, financial advice, training, etc.

Requesting information from other organisations

You may need to send an email or telephone someone to request information be sent to you. Be clear about the information you need so the people you are asking can obtain it quickly and send it to you. You may need to explain why the information is required. Be prepared to answer these questions before telephoning.

This type of information includes:

- product brochures and other marketing materials that list goods or services required by the organisation
- annual reports, financial information or the achievements and objectives of competitors
- tax and accounting information
- Delivery or invoice details
- customer credit applications.

Intranet

Many businesses manage their own intranet. This is a private network that holds information only accessible to its staff.

An intranet can hold a variety of information, such as:

- 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

Folders and files

Records kept in current or archival file may need to be accessed from a large information management system You will need to follow the naming standards and other procedures for locating files and saving them when you have finished using them. For example, you may be asked to retrieve information for a staff member for project, including:

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

Online forms

Electronic forms have fields that require information to be entered using a field, checkboxes and radio buttons. You may be required to complete an online form or gather information from forms completed by others.

Online forms make it easy for the information to be analysed because the information requested is consistent and in the same format in each form. For example, a job application form asks a series of questions about the applicant, including personal details and employment record. Applicants provide individual details that can then be compared.

Feedback forms can be used to collect information on the customer experience. Data collected through feedback forms is usually transferred to a database, where it can be analysed.

Listening and observing

Information is often collected by watching and listening to others. For example, you may have to follow a set of instructions or report on the way staff are following a set of procedures or observe if they are complying with WHS regulations. Observing and recording the actions of others can be done using a checklist.

Networks

People in the workplace use networks to share information and ideas. Networks are groups of people with a similar professional interest who communicate regularly for mutual benefit. When information is required, a network contact may be able to offer some advice. However, you may need to verify that the information you have been given is correct or up to date. Networks often share information via email or one of the social media platforms, such as Facebook.

Example

Procedures for entering and retrieving data

The BizOps information management system is set up to provide a clear, logical system for saving electronic files on the BizOps network, which will result in easy access to documents.

Enter and retrieve data

To enter data:

- confirm the information you are to enter
- access the correct file or database using the index
- key in the information required
- check the information is correct
- save the file.

To retrieve data:

- confirm:
  - the information you are seeking
  - who it is for
  - when they need it
- identify if there is any authorisation needed for access
- access the correct file using the index or use a search engine for the internet
- check the date of the information to ensure it is:
  - current, if required
  - the correct date if it is an archived file
- print out relevant information
- use a file marker to indicate that a file has been taken.

Example

Procedure for establishing a new folder or file

Before creating a new folder, think carefully about what is to be saved in the folder and who needs to access the information. Do not create a new folder for a single document unless you are sure that multiple files relating to the same topic will soon be saved in that folder.

Documents should be clearly named with the generic topic first. This ensures that similar documents will appear together when file names are sorted alphabetically. If a large number of related documents begin to appear in a folder, a sub-folder on that specific topic can be created. Remember to always ensure file and folder names adhere to file-naming conventions (see below).

Steps:

1. Create or assign a name or number to the file according to the BizOps file-naming conventions.
2. Make sure the new file fits into the existing system or is set up logically.
3. Create an index card or entry for the new file.
4. Document the new file in a file register or database.

Practice Task 1

Question 1

Which of the following statements relate to policies and procedures for receiving and acquiring information? Tick all that apply.

- ◯ Seek permission or confirm with a supervisor before sharing the personal details of another person.
- ◯ Comments about work colleagues can be posted on personal social media accounts as long as management don't read them.
- ◯ The Privacy Act defines sensitive information to include membership in a sporting club.
- ◯ Doing research on the internet into a competitors' products and services is a breach of the Privacy Act.
- ◯ A person must give permission for their personal information to be used by the business.

Question 2

Draw a line to match each term about the different types of information to its description.

» Staff records	» Storage of information about business operations
» Database	» Includes all communications conducted by a business
» Financial data	» Storage of the personal information of staff
» Correspondence	» Data used to monitor the performance of the business

1B Check information for clarity, accuracy, currency and relevance

Integrity of information means that information is clear, accurate, current and relevant to the task.

The information you receive and collect must be reliable because it will be used to help the business maintain its operations and its performance. For example, your manager may use the information you have gathered to develop long-term business plans or to produce sales forecasts on which budgets will be set.

Specific departments and teams need information relating to their area of responsibility. For example, if you work in a human resources department you may need to access current legislation on equity and discrimination, and customer service staff need to access to current products and services.

Make sure you understand how the information you are collecting will be used. For example, how far back do you need to search to find the data? Who will be using the information?

Ask questions and listen carefully to the instructions given to you and clarify with your manager if you don't understand the task and the requirements of the information you need to collect.

Check information for clarity

Determining the clarity of the information involves making sure it is suited to its purpose and the audience.

Think about the end users or audience of the information you are collecting or requesting. The information needs to be coherent and make sense to the reader or for its purpose or use.

If there are more than one example of the information you need, choose the record or example that explains the information succinctly and is the easiest to read.

- Read and look for jargon or technical language that may be unfamiliar, irrelevant or too complex for the audience. Technical and highly detailed information can be used as long as it meets the purpose of your task.
- Check information is logically organised under relevant headings or a numbering system, so it is easy to navigate and find the relevant sections.
- Check for accuracy of spelling and grammar so it is professional presented and review it before it is used or shared with others.

Assess accuracy of information

Information needs to be correct and precise. Inaccurate information can be damaging and sometimes dangerous. For example, data that is incorrectly recorded can means financial information is inaccurate. Using out-of-date information about hazardous chemicals could lead to serious safety consequences for staff.

The following criteria can be used to make a judgement about the accuracy of information.

Currency

When was the information last updated? What time period does it cover? Documents should have the date it was last accessed or updated. Compare drafts, versions or different copies of similar documents to provide evidence about which is most accurate and up to date. Look for the date when the information was last updated. If you don't know the date of the document and you can't find out, you need to question the accuracy of the information. Government, business or industry peak bodies will provide the date it was last updated.

Save information using the file saving and naming protocols used in your organisation. This will make it easier to find the information in the future.

Reliability

Can the information be relied upon to provide a reasonable and balanced perspective on a problem or issue? For information accessed from the internet, check the author's credentials and where the information was sourced. Ask your supervisor to help.

Validity

This is similar to reliability. Is the information from a reliable source? You may need to check with a colleague or supervisor or compare it to an original. For example, check for a signature on a formal document to determine its validity. 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 being the information required/requested. For example, accounting data may have been authorised by a senior accountant. Ask your supervisor to check information or who you can ask for help to verify a document.

Example

Assess information for currency

Animal Magic keeps files on all products sold to customers from their vet practice. The information includes a record of treatment to the pets and the owners' contact information. Over many years the practice has collected a lot of information in a record book but has neglected to update it when owners have moved to other suburbs or pets have died. Many records are now redundant. When the vet wants to send some promotional material to current customers, she finds that much of the information is no longer relevant, the email addresses written down are incorrect and the information doesn't reach her customer.

Assess information for relevance

Decide if the information you have accessed will be useful for the task you have been set.

When searching for information and documents, resist collecting more information than is required for the task. This will result in irrelevant information being included that may be beyond what is needed. Try to avoid duplicating or repeating information. Repeated information takes away from its clarity and is likely to be irrelevant.

If you decide that some information held by the business is not relevant, establish if it should be retained and filed or deleted. Some information will have a limited life. Here are some examples:

- A product catalogue is out of date once a new one has been issued containing different goods or prices.
- A sales report is superseded when a new report is issued containing current figures.
- Instructions for operating a piece of equipment that has been replaced, is no longer valuable.

Never delete information without first confirming with others such as a supervisor, that it is no longer required. It may still be useful to others or may need to be kept for compliance reasons for a period of time. A good example is an incident report required for WHS compliance.

Practice Task 2

Question 1

Draw a line to match each term to its definition.

» Relevance	» Information is coherent to the reader or for its purpose.
» Currency	» Information is correct and precise.
» Clarity	» Information is current and up to date.
» Accuracy	» Information is useful and necessary.

Question 2

Which of the following statements are correct? Select yes or no for each one.

a) To make information clear to its audience, remove all jargon or technical language.	» Yes	» No
b) For information accessed from the internet, check the author's credentials and where the information was sourced.	» Yes	» No
c) Most government websites provide details of when the information was last updated.	» Yes	» No
d) Duplicated or repeated information will often be irrelevant.	» Yes	» No

1C Access additional information from stakeholders

Additional information may be needed from stakeholders within and outside of the business.

Every organisation has different types of stakeholders with varying roles depending on its structure, size and relationships. A stakeholder is any person or group who has a 'stake' in the organisation. This refers to the degree of influence on the business, or someone that is affected by the operations.

You may need to communicate with different stakeholders to obtain or clarify workplace information.

The following table lists a range of internal or external stakeholders.

Internal stakeholders	External stakeholders
▪ Board of Directors ▪ Business owner/s ▪ General Manager ▪ Chief Executive Officer (CEO) ▪ Chief Financial Officer (CFO) ▪ Department or Area Managers ▪ Team leader or supervisor ▪ Team members ▪ Work colleagues	▪ Government agencies ▪ Customers/ clients ▪ Network members ▪ Shareholders ▪ Technical advisors ▪ Consultants ▪ Suppliers ▪ Delivery or dispatch companies ▪ IT services

Use effective communication skills

Effective communication is essential when gathering information from stakeholders.

You will need to use different types or forms of communication for different stakeholders. For example, the information that a customer requires to their email query, will be different to the information a business owner will require from their teams.

Always pitch your language to match the needs of the other person. This will require you to check that:

- you understand what the other person has said
- listen carefully to understand the other person's viewpoint
- use appropriate body language to assist the communication process.

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.

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 follow the correct protocol when making contact, for example, make an appointment with a senior manager before going to see them directly.

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.

When collecting information or data over the telephone, 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.

When requesting people to complete a survey or questionnaire, be polite, brief and be clear.

Making it easy for the person increases the quality of their answers. For example, make sure the questions in a questionnaire focus on the specific information you need and are clear:

- 'Where did you hear about our products?'
- 'Is information on safety aspects clearly provided to you?'
- 'What quality aspects of our products appeal to you?'

Access information via email

Email is an excellent tool for collecting information. A single request for information can be distributed to many individuals that saves time and effort.

Use the subject line to indicate the purpose of the email. Use the body of the email to 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.

Communicating effectively

Face-to-face communication is often the most effective form of communication.

You will need to use a range 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.

Listening skills

If you want to collect verbal information from people, you need to be a good listener. Being a 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. For example, don't let your eyes wander around the room or close the door so no-one interrupts.

You can use your body language or verbal cues to show you are listening, such as turning towards the person, nodding your head and saying 'Yes' or 'I understand'. You should maintain an open body position with arms and legs uncrossed. Listen for key words and take notice of the feelings behind the words and how the words are being said.

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.
Don't criticise, evaluate, comment or pass judgment.
Keep an open mind. and 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.

Questioning skills

Gathering information from people involves asking questions. The ability to ask the right question at the right moment in a conversation can avoid misunderstandings. Do not assume the other person knows what you mean. You must first decide what information you are looking for and then ask questions that help you get the information you want.

There are many 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 ...?

Practice Task 3

Question 1

Draw a line to match each of the questions to either of the three choices.

» How can you correct this problem?	» Probing
» What is your account number?	» Open
» Can you tell me about that?	» Closed
» Do you think the resolution of the problem will work?	» Open
» What happened?	» Probing
» Have you considered Mary's performance potential?	» Closed

Question 2

Which of the following are ways to acquire information from stakeholders? Tick all that apply.

- ◯ Stakeholders are always willing to help and provide the information you need.
- ◯ It is polite to confirm it is a convenient time to call or if they prefer you to make an appointment.
- ◯ In a face to face interaction, make eye contact and give the person your undivided attention.
- ◯ Expect an immediately response to a request via email for information to be delivered by a due date.
- ◯ Asking the right question at the right moment in a conversation can avoid misunderstandings.

Summary

- Access to accurate and timely information is the cornerstone of every successful business.
- The types of information held by an organisation depend on the its industry, type and size of its business operations.
- Information may be accessible to different or limited numbers of people in an organisation depending on their job roles.
- Information can be received and acquired in either written or verbal form such as hard or soft copy or explained in words.
- Information must be accessed according to workplace policies and procedure, especially according to the principles of the Privacy Act.
- Assessing information for accuracy, currency, clarity and relevance in relation to its use is an integral part of managing information in the workplace.
- You may need to speak with a stakeholder to clarify your task or to obtain information.
- When gathering additional information from others, you should use active listening techniques, ask appropriate questions and be mindful of your body language.

Learning Checkpoint 1

Receive, acquire and assess information

Part A

1. Suggest three ways to check information for accuracy, currency and reliability.

2. You have been asked to collect information that shows the benefits of a new photocopier. Give two examples of reliable information you could collect.

Part B

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

Case study

Sophie works in the office of a manufacturing company that makes cleaning equipment. She has been asked to help the marketing team with a research project on customer feedback and competitors' products and services.

1. Which of the following are the type of information Sophie could use? Tick all that apply.

   - ◯ Search the internet for similar products and services.
   - ◯ Find information from the intranet about current products and services, customers and sales data
   - ◯ Seek feedback from customers about their satisfaction with products and services.
   - ◯ Seek information from customers about the future of cleaning products.
   - ◯ Find promotional materials with information on the various features of each product.
   - ◯ Explain the research to the competitors in the market and ask for samples of their products.

2. Identify two things Sophie can do to ensure the information she receives is accurate and relevant.

3. Give two reasons why Sophie should follow her workplace policies and procedures for handling workplace information.

4. List three communication skills Sophie can use with stakeholders to obtain the research information she requires.

Topic 2 | Organise information

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

2B Store information using systems and technology

2C Distribute information to stakeholders

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

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

Information 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.

- What is the purpose of the information and how will it be used?
- 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?
- What procedures or style requirements will need to be followed for its presentation or format?
- What format will it be required; a soft and/or hard copy?

Preparing information

Information might be used for one of the following reasons:

Analysis

Analysis means to break a complex problem or data down into smaller, more manageable parts so it can be examined more easily. This is done because smaller pieces of information are easier to understand or find a solution to a problem. For example, analysis of the details of the type of products purchased by different customers is more useful than a list of the total number of products sold.

Interpretation

Interpretation means explaining the meaning of a piece of information. For example, interpretation of sales data can explain the buying patterns of different customers.

Dissemination

Dissemination means to spread or distribute information to stakeholders. For example, company financial information may be sent via its annual report to its stakeholders. Information may be saved as a PDF for attaching to email or zipping files to make them smaller size.

Preparing data and information

Information needs to be checked for spelling, grammar, consistency and style.

Although you might prepare information very carefully, there will probably still be some mistakes. It is better to find these before you submit your work or share it with others. Edit and proofread work by closely reading it yourself before getting someone else to read it. Editing identifies the errors in grammar, punctuation and spelling so they can be corrected.

Spelling	Never rely entirely on the spell-check function on your computer. It only identifies spelling errors, not words that have been used incorrectly. Words may also be spelled in different ways; for example, American and Australian spellings of words such as organize/organise. Check your organisation's style manual or ask your manager if you are unsure.
Grammar	Grammar and punctuation suggestions made by software applications are not always correct. Check them yourself before accepting the suggested change.
Numerical data	If you are working with numbers, match your document with the original figures you were given and make sure they are accurate. It is easy to make a mistake when entering a lot of numerical data into a document.
Style	Style should be consistent throughout a document. Make sure headers and footers are correct, and that the font is consistent throughout. Check your organisation's style guide or manual or ask your supervisor if you are unsure.

Follow organisational requirements

The requirements for information appropriate for one organisation or department area may not suit another; for example, a law firm's requirements would be different from that of a sports equipment retailer.

Organisations outline their procedures and guidelines in a policies and procedures manual, or in an in-house style guide. A style guide will provide details of the way the organisation wants its documents or reports or other information to be structured.

Policies and procedures for handling information may explain how to communicate with external clients, the type of information that can be shared through email or who can have access to documents or reports. Many policies reflect legislation that applies to the information such as the privacy requirements described in an earlier section. Another example are copyright requirements for acknowledging when someone else's ideas or original work are being used such as an image, their words or ideas. Under copyright, the author has the right to determine the conditions their work can be used by others.

You may need to confirm your actions with a supervisor to make sure you are following correct procedures when organising information.

Established procedures may include:

- referring to the organisation's style guide
- using templates that have a set style
- including the organisation's logo
- including version control or file path in the footer
- acknowledging the use of someone else's work
- delivering the content in the required format such as hard copy, soft copy or as slides or a bound document.

Example

Organisational style

Jenni has recently been employed as a marketing assistant for an ad agency called Impact. The company often uses presentations to communicate to the clients. Jenni has been asked to prepare the information she has collected using a template to prepare for a meeting, but she will need to change the colour scheme to reflect the corporate colours of the client.

Here is a sample of the design requirements contained in the template that Jenni will use:

- The company logo should appear on the top left.
- The date should appear on the bottom right.
- One heading should be used per slide.
- All headings to be Arial and all text to be Times New Roman.
- All headings to be bold and in font size 24.
- All body text should be in font size 16.
- There should be approximately three bullet points per slide.
- Use square bullet points.
- Images must reflect and promote the content.

Formatting information

The way information is to be distributed affects the way it is formatted.

The type of information you are organising may need to be prepared or presented in a particular way for its purpose. For example it may need to be:

- Prepared so it can be attached to an email or loaded onto the company's website
- presented as a bound booklet and formatted using a desktop publishing program
- prepared as electronic presentation of slides for a conference or meeting
- required as a table or graph to show numbers and other data.

You will need to choose the most appropriate software application and equipment to collate and organise information.

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 numbers such as financial or sales data. The functions of a spreadsheet allow for data to be presented in a way that it is easy to analyse. An example is Microsoft Excel.

Visual diagrams

Graphics such as shapes, charts, diagrams, pictures and tables are a useful 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 include Microsoft Access and Tracker.

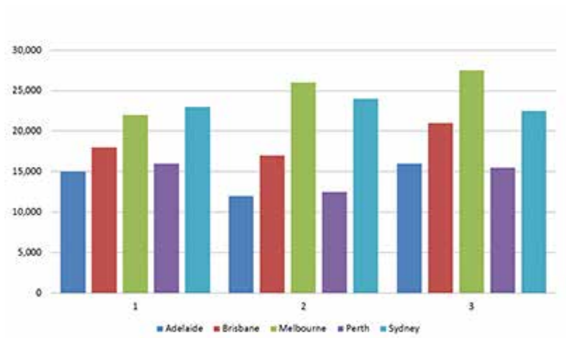
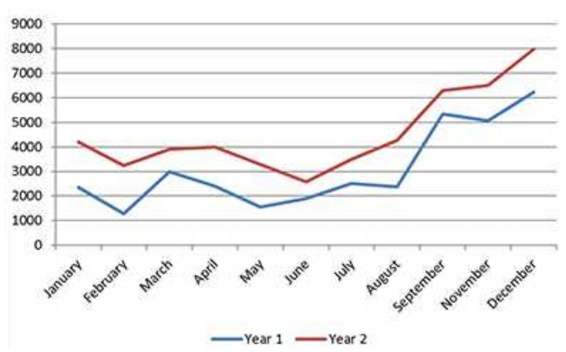
Formatting using tables, charts and graphs

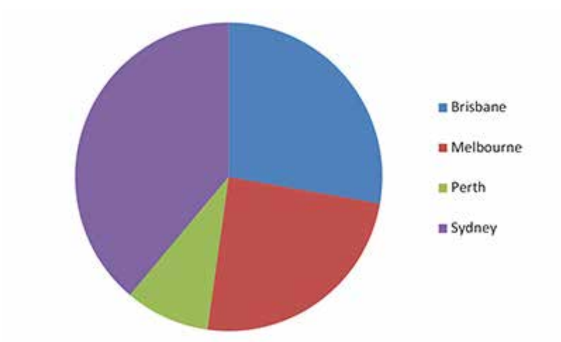
Tables, charts and graphs make certain types of information easier for the reader to analyse and interpret.

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 applications can create charts and diagrams to draw lines and shapes, drag and drop shapes onto your page, connect the shapes with lines, and add text, colours and images. Sometimes a visual diagram is more effective than words for delivering a clear message or making a point.

Different types of graphs are shown below along with a description of their appropriate use.

Types of graphs	
1. 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 change from one month to the next in different cities.
2. Line graph 	A line graph is used to show continuous data or how one thing affects or compares to another.

Types of graphs	
3. 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.
4. Flow chart 	Flow charts are used to create models of business processes and they show stages and relationships between items on the chart.

Formatting using images

Graphics and pictures are added to documents to can be used to emphasise information, draw attention to a particular section or can be used to create a break in the text by inserting an interesting image. In most cases, images need to reinforce and align with the content. Be careful not to overuse visual images as it can also detract or take away from the content you are providing.

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

Photographs

Photographs may be included in newsletters, personnel files, reports, brochures and many other office documents. Photographs can be scanned and stored as electronic files or simply uploaded from a digital camera or phone. Remember to seek permission from the person whose photograph you wish to use.

Images

These are photographs usually found on the internet or from a purchased software application. Example include iStock, Shutterstock, Adobe Stock, Flickr, etc.

Example

Types of software applications used at work

Joan works in administration for an aged care facility. She needs to use of a range of software applications to complete her tasks. Below is a summary of common types of computer applications and descriptions of what they are used for at Joan's workplace.

Word processing software

Word processing software produces documents, such as letters, and reports, e-newsletters 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.

Spreadsheet software

Spreadsheets are used when numerical data and calculations need to be made. Spreadsheets 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.

Desktop publishing software

Desktop publishing prepares documents containing text and graphics, such as newsletters, reports, manuals, flyers, brochures and catalogues. Desktop publishing packages, such as InDesign, Publisher have capabilities for dealing with layout and graphics far beyond those of word processing packages.

Presentation software

The most used software for organising information for a presentation is PowerPoint, which allows you to create slides. 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. The benefit of presentations is that the audience can see the information while it is being explained to them.

Practice Task 4

Question 1

Draw a line to match each term to its definition.

» Dissemination	» Breaking information into smaller parts to make it easier to understand.
» Analysis	» Providing the meaning of information
» Interpretation	» Distributing information to stakeholders

Question 2

Which of the following statements relate to formatting information according to policies and procedures? Tick all that apply.

- ○ A style guide is used so there is consistency in the way documents and records are organised.
- ○ Copyright legislation means you are free to use any information you find on the internet.
- ○ Database software can be used to organise information ready for analysis and interpretation.
- ○ Charts and graphs help make data easier to read and interpret.
- ○ A professional report should include some humour to make the audience laugh.

2B Store information using systems and technology

Business information is maintained using some form of information management system (IMS).

Business records need to be stored securely and accessible by staff when required. A centralised records system is often used because of the large numbers of records that need to be held. Some small business will also keep hard-copy records for example, a doctor's surgery generally keeps hard-copy patient records close to the reception area.

Workplaces will provide training and a set of policies and procedures for their management system. Procedures will include rules on creating, storing, retrieving and disposing of information.

Information management systems
▪ An information management system is a records management tool. It is a general term for software that stores and organises information. It is used for data entry, data tracking, accessing information and maintaining security of information. These programs can have a complex range of features and functions. For example, a human resources information system would be able to perform a range of functions, including payroll processing leave requests, reviewing performance management, scheduling training requirements and tracking employment interviews.

Other types of technology used to store and organise information include:

Knowledge management systems

- Knowledge management systems are used by organisations to enable employees and customers to create, share and find relevant information quickly. They are particularly useful for businesses that sell products and /or provide services.
- Knowledge management systems use electronic databases or catalogues, where keywords and searches help to record or locate knowledge (information). This type of system can typically search for and retrieve existing information, manage and store information, and allow information to be shared. For example, a customer may use a search function to find features of a product or service from a business's website.

Record management systems

Record management systems are used to track and store 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 industries have legal and organisational requirements for maintaining their records. Some companies have a system that takes all documents from the previous financial year and archives them because they are no longer needed. This allows the records that remain to be up to date and accessible.

Example

Sample knowledge management procedures

Introduction

BizOps Enterprises' knowledge management procedures aim to capture, develop, share and effectively use organisational knowledge to maximise intellectual capital and enhance operational efficiency. All knowledge management procedures should be undertaken in accordance with legislative and business requirements.

Scope

These procedures apply to all staff, including any contractors carrying out work on behalf of BizOps. They apply to any records, documents, or information received, distributed or created in all BizOps activities, both physical and digital.

Procedures

All BizOps employees must adhere to the following procedures and guidelines in relation to organisational knowledge management.

Creation

- Knowledge documents must be created in accordance with BizOps' information management policies and procedures.
- Knowledge gained from customers, suppliers and other stakeholders will be documented in accordance with organisational policies and procedures. Compliance with relevant legislative and regulatory requirements, such as the *Privacy Act 1988* (Cth) and *Copyright Act 1968* (Cth), must be observed at all times.
- BizOps employees are encouraged to build on organisational knowledge through approved educational training and participation in industry events. Documentation of the outcomes of such activities, including how acquired skills can be applied, is mandatory.
- Internal training and evaluation should be undertaken within teams on a yearly basis, to reinforce knowledge, identify knowledge gaps and promote knowledge sharing.

Sharing

- Staff who have participated in significant external training must share relevant knowledge with co-workers, through internal training sessions and/or practice.
- Staff who have attended important industry event/s must provide senior management with a formal summary of any relevant knowledge or information gained.
- Internal meetings, to share ideas and experiences, will be undertaken wherever appropriate.

Storage and knowledge retention

- Knowledge documents must be stored in accordance with BizOps information management policies and procedures.
- BizOps employees must contribute actively to the documentation of organisational knowledge, through the use of recording documents; for example, reports, records of outcome, application and financial documents.
- Employees leaving a position are required to produce and final report, documenting their position and any important knowledge that should be passed on to an incoming staff member.
- Employees leaving the organisation are required to participate in an exit interview to for the purpose of knowledge transfer.

Folder structures and naming standards

Folders are used to organise files, so they are easy to locate.

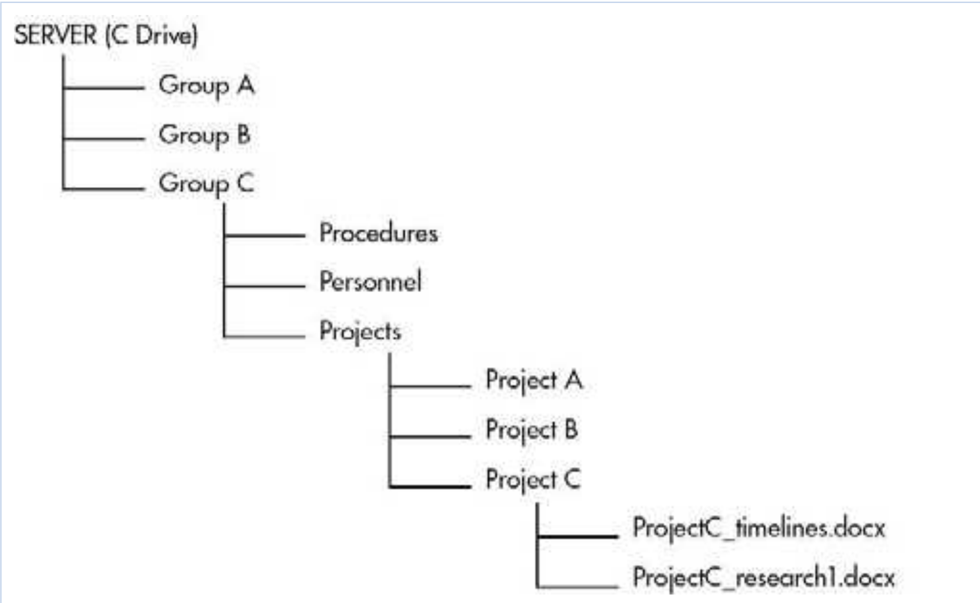
Every business will have a system of folder structures and naming standards to ensure that all files are stored in the correct location. This makes sure that others can find the information they require. Folders have a treelike structure that branches from a parent directory to sub-folders in a hierarchical structure.

If your organisation has a network, you may have shared directories and folders that several staff have access to.

Advantages of shared directories and naming standards
▪ Organised files are easy to find. For example, it is much easier to find one file in 10 than it is to find one in 100.
▪ If someone is unavailable, others can access the document and finish it if necessary.
▪ Work is less likely to be duplicated, as staff can check if a document has already been created.
▪ It is easy to share documents between employees.
▪ Files are secure because they are backed up on a regular basis.
▪ Virus scans are normally run on shared folders on a regular basis.

Example

Branches of a folder structure



In the example structure above, the server has three folders for three separate work groups:

- Group A
- Group B
- Group C

Group C has three major folders:

- Personnel
- Procedures
- Projects

The Projects folder includes:

- Project A
- Project B
- Project C

Project C has two documents (or files):

- ProjectC_timelines.docx
- ProjectC_research1.docx

The file path for retrieving a document starts at the server and ends when the correct document is located. For example, to reach Project C_timelines.docx, the file path to follow is:

C:\GroupC\Projects\ProjectC\ProjectC_timelines.docx

Passwords and security

Passwords may be required to ensure that only authorised users are able to access certain files and information.

Access to an organisation's data can be controlled at a number of levels, including drives and files.

Most organisations have networks made up of multiple computers. Before employees can use a computer that is connected to the network, they must be issued a login username and password, which identifies them and allows them to access the files on the network. Your IT support person will also provide advice. Alternatively, refer to the organisational policies and procedures for password protection.

Below are some instructions for selecting a password and keeping your work secure.

Selecting a good password

You should change your password on a regular basis and ensure you do not tell anyone what it is. Your password should not be anything that can be easily guessed by other people, such as your date of birth, name, family members' names, etc. Good passwords contain a mixture of letters and numbers and are least six to eight characters long.

Protecting individual files

Depending on the network set up, employees will have their own drive for their files along with access to various shared drives. Where files contain sensitive information that should not be accessed by all employees, you can apply a password to an individual file. Two levels of access can be applied:

- a password to open the file, which allows the file to be viewed and printed
- a password to modify the file, which will let the user make changes to the file.

Hard copy storage

Many documents stored digitally may also be stored in hard copy.

Managing the storage of hard-copy documents requires you to conserve space and dispose of irrelevant documents. It is normal office practice for staff to perform archiving duties; that is, removing inactive files and placing them in long-term storage.

Here is an example of a retention schedule for hard copy documents.

Retention schedules for hard-copy documents	
Credit card receipts and statements	2 years
Tax records	6 years
Invoices	1 year
Client correspondence	2 years
Presentations	6 months

Example

Procedure for storing hard-copy documents securely

The following security measures must be implemented:

- Keep hard-copy cabinet files locked; return the key to your manager.
- Obtain signed authorisation from a manager for access to restricted paper-based files.
- Keep paper files in a safe place when out of the system; do not leave files lying around unprotected.
- Do not remove items from a file unless authorised to do so.

Systems for deleting information

When you have access to a shared directory to store your files, you may also have access to files created by other employees.

It is important that you check your files and delete any that are no longer required on a regular basis to ensure the system remains efficient. Before deleting any files, check which projects or clients you need to keep files for by asking your supervisor. You should never delete or move files created by another employee without their permission; always check first.

Organisations usually perform regular backups of shared directories and folders. In larger organisations, a staff member from the IT department will usually be responsible for this.

Example

Procedure for deleting files

Files may only be destroyed or deleted by authorised personnel or those instructed to do so. Keep a register of files removed or destroyed or obtain written permission to remove or destroy information.

Delete or archive files:

- that have not been accessed for three years
- of personnel who have left the organisation after the period they are legally required to be kept.

Managing 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.

Managing emails
Create folders to store emails under different topics
Regularly delete messages you do not need to keep.
Forward messages that are to be shared.
Use a *Request for Delivery Receipt* or *Request a Read Receipt* when sending important or time sensitive emails.
Use categories or flag messages that need attention.
Save attachments to appropriate folders.

Example

Information management system workplace procedures

File naming and storage procedure

- Electronic files that must be retained for business purposes must be saved on the network in the 'G:\ Drive' using the most appropriately named folder or sub-folder, according to the nature of the information contained within the file
- File names must include a brief description of the content, the author and date of creation
- File names must be recorded in sentence case at all times
- File extensions must be checked prior to saving and filing documents on the network
- The creation of new folders in the network must only be authorized by the Office Manager.

Information security procedure

- Staff are required to take all reasonable actions when working with electronic files to prevent loss of materials and ensure documents and files can be easily identified and retrieved to meet the business needs
- Usernames and passwords must not be provided to other staff members, customers or external parties
- Computers must be logged off prior to any meal or rest break and turned off prior to finishing a shift
- Information regarded as confidential, personal or sensitive must not be present on a computer screen at any time when the staff member is not present at their workstation
- Staff must not use computers for any personal use, strictly including email, downloading software, purchasing goods or services, internet browsing or social media.
- Staff must report any security issues related to passwords or unsolicited emails to I.T. immediately upon being aware of the problem.

Practice Task 5

Question 1

Draw a line to match each technology for organising information to its example.

» Knowledge management systems	» Locating an employee's file that needs to be updated.
» Record management systems	» Using a key word to search for a report with a particular title.
» Email	» Using a customer reference number to find an invoice.
» Information management systems	» Placing a flag next to information that needs to be followed up.

Question 2

Which of the following statements are correct? Select yes or no for each one.

a) Naming standards makes it easier for everyone to locate information.	» Yes	» No
b) Your date of birth is a secure password.	» Yes	» No
c) Always confirm with others that a file belonging to a colleague can be deleted or moved.	» Yes	» No
d) Storage of hard-copy documents must be managed to conserve space.	» Yes	» No
e) After a period of employment, staff are no longer required to use a login and password to access a network computer.	» Yes	» No

2C Distribute information to stakeholders

Workplace information needs to be distributed so it can be accessed by others without delay.

The method used to distribute information should be appropriate to industry standards and the organisation's information policies and procedures.

Email or secure data encryption over the internet is used to send documents and files. There are limits placed on the size of attachments that can be sent by email. If the file is too big to send this way, then it may be able to be sent in several emails or shared by another method such as a cloud-based application. File sharing platforms allow you to upload information to a cloud-based server and providing the link to the stakeholder to access the information.

If a document or record is located on the network, a file path can be provided to locate the file. The original record should always be retained in the recordkeeping system and a copy of the electronic file sent rather than the original. This ensures that the original is preserved.

If a record is to be delivered via internal post or courier, copies can be printed and sent. Some documents are classed as restricted or confidential in nature. The security, presentation and physical condition of the documents must be carefully considered. For example, a registered post bag or courier may be used to deliver special documents.

Hard copy reports or documents that are bulky, unbound and contain loose contents will need to be placed into binders.

Ways to share information:
▪ Sharing a link to a cloud-based site, such as Dropbox, SharePoint or Google Drive ▪ Posting hard copy documents ▪ Using a courier to deliver hard copy documents ▪ Delivering a presentation to a group ▪ Sending an email with a document attached ▪ Hand delivering a record to an internal stakeholder ▪ Communicating information verbally

Sending information via email

Email can be used to send confidential material to specific people. Always check the recipient/s to whom you are sending the email to and confirm email addresses with the records to ensure they are accurate.

Confidential emails should be marked as such in the subject line or as a heading in the body of the email. Businesses include a disclaimer at the end of the body of the email to inform the user of their obligations for deleting the information if it was sent incorrectly to them. You can also add a Request to Delivery Receipt when you send an email to confirm that the person received your information.

The following table explains the structure of an email.

Subject line	A subject line is a short statement about the purpose or name of the information.
Greeting	A greeting is the salutation used to greet the recipient. Standard business emails use the following rules: ▪ For unknown recipients or for formal emails, use "Good morning/ afternoon Mrs Jones", "Dear Mrs Jones" ▪ For informal or internal emails or where you have a positive relationship with the recipient, use "Hello Peter", "Hi Peter" or Morning/Afternoon Peter"
Body of text	The body of text is the key content of the email details of what needs to be communicated and any follow-up or action that must be taken by the recipient. Be clear, concise and courteous. Check to ensure that no part of your email could be misunderstood and use language that the recipient will understand. Use bolded words, underline or colours to highlight key points and actions that need to be taken. Use small paragraphs of one-three sentences maximum or where possible, bullets and number lists instead of lengthy paragraphs.
Attachments	There are three important considerations when it comes to attachments in accordance with organisational and service provider requirements: ▪ Attachment size - Multiple/large attachments can slow down the recipient's computer or overfill their inbox. To avoid this issue, reduce the file size by compressing files or creating a zip file or post pictures/ videos to an online site or virtual storage like Dropbox or Google Docs. ▪ Attachment format - Consider the format of the attachment that you are sending and whether the recipient will have the appropriate software to open it. To avoid this issue, convert your file and send it in PDF format. PDF's are not software specific and PDF Readers are free to download. ▪ Appropriateness (time and content) - Especially if it is a large file, it is courteous to ask the recipient when the best time would be to send the email, for example, sending after hours might overfill their inbox.

Ending/ Farewell	The final closing or farewell. Use "Kind regards", "Regards" or "Thank you" for formal and informal emails followed by a blank space and your full name on the next line below.
Signature	All email programs whether they are installed packages like Outlook or online services like Gmail will include the ability to create a signature for your email. An email signature will usually be dictated by the organisational requirements set out in a style guide. A standard email signature will include: ▪ Your full name ▪ Job title ▪ Mobile, business and facsimile numbers ▪ Organisational name, address and website ▪ A company logo
Disclaimer	A disclaimer is a standard statement describing privacy, confidentiality and environmental requirements relating to the email. It should be included in all business emails.

Example

Sample email disclaimer statement

This e-mail is intended for the use of the addressee only and may contain confidential information. If you are not the intended recipient, you are hereby notified that any use or dissemination of this communication is strictly prohibited. The sender disclaims liability for any errors, omissions, viruses, loss and/or damages arising from using, opening or transmitting this email. If you receive this transmission in error, please notify Aspire Learning Resources immediately then delete this email.

Communicating verbal information

If you are presenting information to supervisors or colleagues, ask them how they would like the material presented. For example, it may be communicated verbally during a staff meeting or on an information poster displayed in the office. Information being produced as a part of a presentation may also require speaker notes or notes for the audience.

When communicating to stakeholders on the telephone:

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

Practice Task 6

Question 1

Provide three examples of ways information can be obtained and shared in a workplace.

Question 2

List three things you need to consider for the safe and secure distribution of information to others.

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

Problems occur frequently in business and issues can be overcome when you work collaboratively

Here are some examples of common issues related to accessing, organising and storing information.

- Information is incorrect as a result of inaccurate research or poor editing
- Information is not clear or relevant
- Information is not logically organised.
- Instructions for locating or distributing information are not clear
- Policies and procedures have not been followed such as the style guide or privacy principles
- Access restrictions means a delay in getting permission to obtain the information
- A stakeholder does not supply information by the due date
- Technical issues with the network or information management system interrupt a network connection
- Passwords or usernames are out of date and require renewing
- Poor file naming standards have not been used and information can't be located
- The latest version has been lost or has not been saved correctly

Exiting applications and saving your work

Data loss is a common issue and the program, or even the whole computer, may appear to freeze.

A common issue is when data is accidentally erased or corrupted and made inaccessible.

Before shutting down your computer, exit all programs by selecting the exit button. Ensure you save your work first. If you have recently made changes to your work, you will usually be prompted to save before exiting.

Here are some other procedures that help secure your work and prevent loss of information:

- Work on a limited number of documents at one time.
- Save the work regularly or have the auto save button turned on.
- Exit the applications before leaving the workstation for any long period of time and shut down the computer at the end of the day.
- Ensure your computer has anti-virus software that is frequently updated to prevent data loss.

Resolving difficulties with information

There are a number of things you can do to resolve problems.

Use your communication skills to explain the issue. This might need to be explained to your supervisor or if it is a problem with technology, then speak to IT department Help desk or team member. There will be procedures for making contact and reporting issues such as using a designated special phone number or requesting permission from a manager before making contact.

Tips for resolving difficulties	
1. Set up appointments	Set up appointments by telephone or email with the people you need to speak to such as an IT staff member of a supervisor. A supervisor may not be able to answer your questions immediately. If appointments are continually cancelled or rescheduled, tell the person your task is now becoming urgent.
2. Be clear about the issue	When you are explaining about the issue, be clear and direct. Don't waste time. Consider sending an email with an outline of the issue and what you need to be done.
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 IT team who may be able to help you if you need a logon password.

Working together to resolve difficulties

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 have difficulties, you can ask team members or your supervisor 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.

For example, you might be given a timeline in a verbal agreement, by email, stated in a work order, style guide or policy document.

Depending on the amount of information, the distribution method and the overall length of the task, timelines may be a few hours, a day or a week. If you think you are getting behind and will not be able to meet the deadline set, explain this to your supervisor and discuss ways to streamline the process or seek help.

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
- use version control in documents so everyone can see which document is the most up to date
- 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.

Practice Task 7

Question 1

Draw a line to match each issue with a potential solution

» You are unable to meet a deadline	» Edit the work before sharing it
» A stakeholder does not supply information by the due date	» Ask a supervisor and clarify the task
» Spelling and grammar mistakes	» Send a reminder email
» Data is accidentally deleted	» Explain the situation to your supervisor
» Instructions are not clear	» Speak to the IT department

Question 2

Provide two examples of working collaboratively to solve an issue with organising information?

Summary

- Information needs to be organised and presented in a format that is meaningful to others.
- Information needs to be checked for spelling, grammar, consistency and style.
- Organisations outline their procedures and guidelines in their policies and procedures manual, or in an in-house style guide.
- Choose the most appropriate software application and equipment to collate and organise information.
- Business information is maintained using some form of information management system (IMS).
- Every business will have a system of folder structures and naming standards to ensure that all files are stored in the correct location.
- Passwords may be required to ensure that only authorised users are able to access certain files and information.
- Email or secure data encryption over the internet is used to send documents and files
- If you are presenting information to supervisors or colleagues, ask them how they would like the material presented.
- Data loss is a common issue and the program, or even the whole computer, may appear to freeze.
- People working together on a problem benefit from the experience of others who have encountered the same or similar difficulties.

Learning Checkpoint 2

Organise information

Part A

1. Complete the table below with at least two advantages and two disadvantages for each of the following storage systems for workplace information.

System	Advantages	Disadvantages
Hard copy filing system		
Digital or soft copy filing system		

2. Complete the following table with examples of technology that can be used to organise, store and access information. For each type, provide an example of a type of information suitable for the technology.

Technology	Example of information

Part B

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

Case study

Your manager has asked you to obtain three quotes from different printing companies for the costs or printing the organisation's annual hard-copy catalogue. You need to compare these costs with those of the current printing company. Your manager has requested you email you results.

1. Suggest two ways to organise the information so it can be easily analysed and interpreted?

2. Outline two ways you can send information listed in question 1, to your manager via email.

3. Provide two examples of organisational requirements for obtaining quotes from companies outside of the business.

4. When preparing to send the quotes to your manager, you cannot access the network drive where the documents are stored. Which of the following will help you solve the issue? Tick all that apply.

- ○ Contact the manager and explain the issue.
- ○ Phone the IT department and demand immediate assistance.
- ○ Shut down your computer and try opening the network a second time.
- ○ Contact the manager and tell them you won't be completing the work.
- ○ Ask a work colleague for advice and if they have experienced a similar issue.

Topic 3 | Review information needs

3A Seek feedback on clarity, accuracy, relevancy and sufficiency of information

3B Review feedback and suggest updates to information processes

3C Document future information needs and suggest modifications to processes

3A Seek feedback on clarity, accuracy and sufficiency of information

Information systems are designed and operated by people.

Users can provide valuable inputs into how the system can be improved and if they obtained the information they need.

You may be asked to provide feedback on how information was accessed and used. It may be your responsibility to gather feedback from stakeholders about their experiences using different functions and features of an IMS. Stakeholders may be colleagues, your supervisor or manager, customers, suppliers and any other people your organisation does business with.

Feedback can be collected in various including written comments in a digital form, via email, face to face or over the telephone.

Feedback can be gathered:

- using formal questionnaires and surveys
- obtained from quality assurance data, audit records
- from customer complaint forms and returned-goods receipts.

Quality feedback

Feedback is useful when it determines if the information needs of the user was met. This means finding out if the information has been useful and met its purpose.

You need to determine if the user found the information clear, accurate, sufficient and relevant.

Clarity	Information should free from ambiguity, clear and be written in a way that the reader understands it. The information should be simple and to the point enabling people to understand its purpose. Too much terminology and technical language in instructions for example, can make them too difficult to follow.
Accuracy	Accuracy means the information and data contained within the record is correct. It ensures the contents are a truthful account of the facts and be free of errors or missing information. Information also needs to be up to date.
Sufficiency	There needs to be the right amount of information to help the stakeholder complete their tasks.
Relevance	All information provide should have a direct relationship with the subject it is provided for. The information must be useful for its intended purpose.

Feedback from internal stakeholders

Make sure feedback provides you with information about the processes that were used to receive and access it.

Feedback about the quality of information gathered is very important in order to improve the collection process. It could be used by management to make decisions and improvements to processes and systems. Not all feedback will be positive. Negative feedback can provide valuable lessons and be used to change and improve processes that are not effective.

Some of the responses you may receive as feedback from stakeholders might be that information:

- 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.

Obtaining feedback from customers

Organisations need feedback from customers about the quality of the information they provide and how they can improve.

Businesses need to know whether the information they provided is sufficient, timely and relevant, and meets customer needs. For example, customers may say that catalogues are hard to find on the website or that can be presented in more user-friendly layout. Information may require editing and proofreading to check its accuracy.

Feedback can be obtained through surveys or questionnaires provided after a sale of a product or service. Customers can be asked to complete an online survey by completing a form on the company's website, in an email or in a hard-copy form strategically placed in areas where customers can see them such as a reception area.

The layout of a feedback form needs to be set out so customers can easily read and complete. It also needs to be straight forward to analyse and record the results. You may need to collect feedback and summarise the information that was collected.

Example

Sample customer feedback form

To what extent:	Yes	Somewhat	No	Comments
❑ Were the instructions easy to follow?				
❑ Was the information set out in a logical and well organised format?				
❑ Was information easy to access or locate?				
❑ Was the information accurate and up to date?				
Please add any additional comments:				

Feedback using quality assurance data

Quality assurance (QA) data provides information about standards and performance.

QA processes ensures that 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 they should.

QA data can provide 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 sporting clothing, may learn from QA testing, that a high percentage of the clothing is subject to shrinkage. This information might come from reports on returned goods, customer comments on their website and feedback from staff in the stores. All this information can be gathered and analysed to provide a report on the quality of products. The company can then use this information to make a change such as to change manufacturers or provide new specifications to their suppliers.

Example

QA data on goods returned from customers

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

Feedback from audits

Information from audit documents and reports can be used to collect feedback on the quality of information.

The term 'audit' is also used in many 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 if they are conforming 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. 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. Businesses need to be prepared for an audit and have their documents ready, where they can find them. They will be given a report on the findings of the audit.

Organisations may conduct internal audits. They may examine the accuracy of data being collected by customer service staff. It may be revealed that more feedback can be gathered from clients that will provide useful information on the quality of the services they provide.

Practice Task 8

Question 1

Draw a line to match each term about the quality of information to its definition.

» Sufficiency	» Information should be written in a way that the reader can understand it.
» Relevance	» Information should be an up to date and truthful account of the facts and be free of errors or missing information.
» Clarity	» Information needs to provide the right amount of information to meet the purpose and requirements of a task.
» Accuracy	» Information should be directly related to the subject and be useful for its intended purpose.

Question 2

Which of the following statements relate to feedback on the quality of information? Tick all that apply.

- ◯ Feedback from staff can be used to improve access and collection processes.
- ◯ Feedback can be used by management to make decisions and improvements to systems.
- ◯ Businesses can use feedback to find out if they are meeting the needs of their customers.
- ◯ Negative feedback means the business is failing and staff will leave.
- ◯ The most popular type of feedback is done over the telephone.

3B Review feedback and suggest updates to information processes

Information used in a review must be high quality, so an organisation can be confident in using it to improve its processes.

As a basis for recommending improvements, you will need to provide sufficient and reliable evidence based on the feedback you received from stakeholders. Evidence can be used to reinforce a suggestion and provide examples to back up your suggestion. This may be numerical data on the frequency of use or the number of times they accessed information. It might show a breakdown of the types of information used by different teams or departments.

Summarising feedback provides an opportunity to determine whether the right information was collected, how it was used, updated and stored, and how process can be updated and improved for future users. Reviewing information is a continual process and part of a quality assurance system.

At the end of your review, you should be able to make some suggestions on ways to update and improve IMS processes. Recommendations will contribute to the decision-making process.

Conducting a review

Below is an overview of different aspects of receiving, accessing and organising workplace information. You can base your feedback and review summary on the answers to these questions. From your results, you may be able to suggest improvements for all or some of these areas.

Quality of information	Consider the quality of the information. Did stakeholders find all of the information reliable, current and valid?
Meeting information needs	Identifying information needs of the users should be a principal goal. Determine if the recipient of the information was able to make appropriate decisions based on the information provided. Here are some questions that should be asked to review information needs of users. ▪ Why was the information needed? ▪ What organisation or department goals did this information contribute to? ▪ Was the information needed to make decisions? ▪ How was the information need communicated? ▪ Who else might need information on this topic? ▪ How accessible was the available information?

Quality of information	Consider the quality of the information. Did stakeholders find all of the information reliable, current and valid?
Collection and acquisition processes	Information may have been collected from several sources. Some information may have required access and permissions procedures to be followed. Ask these questions to review the collection process: ▪ Was there a receipt process in place to acknowledge that information was delivered and received as required? ▪ Was the right information collected? ▪ Who else needed to access this information? ▪ How accessible was the information? ▪ Were all sources of information explored? ▪ How was the information collected? ▪ What search techniques were used? ▪ How long did it take to collect the information?
Purpose of information	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?
Organisation and formatting of information	Determine if 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. ▪ Was the information well organised? ▪ How was the information presented to the recipient? ▪ Was the format and presentation of information appropriate for its purpose? ▪ Could the information have been organised differently? ▪ Was the information organised in a way that allowed it to be easily accessed? ▪ How could the information be better organised and presented in future?
Maintenance and updating of information	Review the amount of maintenance and updating the information required. Ask the following questions: ▪ How many people needed to update the information? ▪ Did the information need regular updating or was it a one-off update? ▪ How could information updates be improved in the future?

Quality of information	Consider the quality of the information. Did stakeholders find all of the information reliable, current and valid?
Storage of information	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 these questions in your review: ▪ 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 often 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 considered to meet future storage requirements? ▪ Are there new technologies that provide cheaper alternatives than is currently being used? ▪ Should security systems be updated going forward?

Example

Use feedback to check information processes

Michael works as an office administrator for a large plumbing business. Once a year, Michael undertakes a formal review of the information management processes that are used to maintain, store and distribute information to internal stakeholders, such as plumbers, supervisors, office staff and senior management.

Michael uses feedback gathered from a formal survey too that he created in Google Forms to identify issues in the information management process. He also reviews complaint and informal feedback received throughout the year from emails and discussions. Michael reviewed the feedback and found that there were ongoing issues with staff being unable to find important files on the shared network.

Following his review, Michael presented his findings in a report to management and discussed ways in which the system can be improved. His recommendations included re-writing the electronic storage filing procedures to ensure information stored on the network is made more accessible to all users when they need it.

Example

Responses to a customer feedback survey

The survey was conducted by the marketing department and its purpose was to determine the brand and promotional awareness of the BizOps company.

50 customers responded to the website survey.

Question	Responses
Company awareness How did you find out about BizOps?	23: Website 4: Newsletter 18: Word of mouth 5: Conference, Advertisement
Brand awareness Do you recognise the BizOps logo?	48: Yes 2: No
Customer perception What do you think of our products and services?	43: Prompt service 20: Friendliness 48: Quality products 50: Products that meet our needs 38: Wide range
Do you know who our competitors are?	42: Yes 8: No
Promotional reach Do you receive our newsletter?	28: Yes 22: No
Promotional awareness Are you aware of BizOps promotional activities?	20: Yes 30: No
How would you like to be informed about BizOps activities? Choose as many as you like.	41: Newsletter 47: Website 18: Promotional flyer 27: Twitter

Practice Task 9

Question 1

For each of the following, provide at least one example of an improvement to processes for receiving and acquiring workplace information.

- Meeting information needs of users
- Collection and acquisition processes
- Organisation of information
- Storage of information

3C Document future information needs and suggest modifications to processes

The information needs of an organisation will change over time.

When documenting your suggestions for improvements to current processes, also consider the changing needs and future direction of the organisation and how this will impact on the IMS. You can discuss the direction of the business with your manager and the type of information that may be needed in the future.

Here are some examples of ways information needs can change or need to be modified.

- An organisation once relied on personal contact with its customers, but now uses online communications via email.
- A bookshop now sells books over the internet and keeps a record of customer transactions and their email and delivery addresses.
- Due to increased competition, an organisation needs access to more regular and detailed information from customers about their needs.
- A new database requires a unique product code to be created for every product.
- Growth in the business means there is a requirement to store more data.

Analyse future needs

Information analysis means comparing the current needs with the future information needs of an organisation.

An analysis can provide a framework for planning for the future. You can use the feedback and reviews you have conducted to focus on future directions and actions. An analysis asks two main questions: What information do we have now? What information do we need to have to meet our future needs?

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

Questions used for an analysis of information needs
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.

Questions used for an analysis of information needs
Are there any concerns about the sharing of information? Do staff have the skills and knowledge to access the methods on offer?
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 all 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? Will a budget be required?

Document future needs

When future needs have been confirmed, planning can begin to incorporate modifications and improvements into processes.

The results of a review and your suggestions for improvements must be recorded and documented. Evidence and summaries of feedback can be collated into a document so supervisors and managers can use it to make decisions based on your findings. You can use word processing documents, spreadsheets with visual diagrams and tables to represent the feedback and review you have conducted. Check your report to make sure you have used the correct format, accurate spelling and grammar and terminology specific to workplace information.

The focus of your report is to present a case for change to ensure information regarding the future needs of the organisation is presented clearly and is easy to understand.

Changes to process will need management approval and may take some time to implement. New processes need to be trialled, reviewed and altered so they meet the needs of users. Once approved there will likely be a 'roll out' period time period for its implementation. This may require staff training and relevant procedures updated and distributed for use.

Example

Investigate and report on an IMS

Carla manages Spectral Entertainment, which rents DVDs and computer games. The business has been operating for two years, but has not been as successful as she had planned. Carla has noticed that many of her customers are families who request children's DVDs she does not have in stock. The computer system she is currently using is limited and slow to retrieve information.

The manager of the head office has requested an analysis and report be done on the information management system, which includes stock collection, suppliers, customer records and reporting capability. The aim is to analyse the current system and its adequacy in providing Carla with the information she needs to improve her business.

Practice Task 10

Question 1

Which of the following statements relate to documenting future information needs? Tick all that apply.

- ◯ The information needs of an organisation will change over time.
- ◯ Evidence collected from feedback can support a change to processes.
- ◯ Supervisors like to change their information processes every six months.
- ◯ Changes to processes require management approval and can take time to implement.
- ◯ Users can be reluctant to embrace improvements in the way they can access information.

Summary

- Users can provide valuable inputs into how the system can be improved and if they obtained the information they need.
- You may be asked to provide feedback on how information was accessed and used.
- Feedback can be collected in various including written comments in a digital form, via email, face to face or over the telephone.
- Feedback is useful when it determines if the information needs of the user was met.
- This means finding out if the information has been useful and met its purpose.
- Reviewing information is an important part of the information management cycle.
- Feedback from customers, colleagues and reports is an important part of reviewing information to ensure clarity, accuracy, sufficiency and relevance.
- Identifying future information needs is vital to the continued success of an organisation.
- 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

Feedback you have collected from customers indicates they do not want to receive hard-copy brochures about sales and new products in the mail. They would prefer to access the information from the company website with an option to receive a reminder email each month.

1. Complete the following table with a summary of the information needs of customers based on your review of their feedback.

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)?	

2. Which of the following statements relate to the brochure information being clear, accurate, sufficient and relevant? Tick all that apply.

- ◯ The information is formatted in way that the reader can understand it.
- ◯ The customers are impressed with the use of technical language.
- ◯ The information is a truthful account of the features of various products.
- ◯ The brochure includes as much information as will fit on each page.
- ◯ The information is useful for its intended purpose as a product brochure.

3. Suggest two ways a review of customer feedback could be documented and presented to your manager.

4. Identify two modifications that may need to be made to the current way the brochure is provided to customers.