

Easy Steps



Unit 123 (V6)

Use office information, copying,
and telecommunication systems

- ☒ Easy to follow
- ☒ Step-by-step instructions
- ☒ Covers Unit Standard Criteria

A Cheryl Price Publication

Unit Standard 123 (Version 6)

Use office information, copying, and telecommunication systems

This book covers the course outline for the following New Zealand Qualifications Authority Unit Standard:

Unit Standard 123 - BUSINESS ADMINISTRATION SERVICES (Level 3, Credit 5)
Use office information, copying, and telecommunication systems (Version 6).

All topics in this Unit Standard are included in this book.

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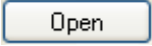




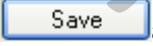
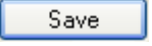
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5	Click on US 123
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7	If you have Winzip use the following instructions otherwise move to step 8.
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	d Click on the  of the  button and click on the My Documents folder. The files will be unzipped.
8	Click on  and ensure My Documents folder is displayed. Click on 
9	Click on Open Folder which will display My Documents folder. Right click on the zipped exercise file and select Extract All. Click on Extract. A folder will be created containing the exercise files.

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Sample Document

Unit Standard 123 Version 6

Title	Use office information, copying, and telecommunication systems		
Level	3	Credits	5

Purpose	People credited with this unit standard are able to use office information systems, electronic copying equipment, and office telecommunication systems, in accordance with office requirements.
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Classification	Business Administration > Business Administration Services
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Available grade	Achieved
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Explanatory notes

- 1 All activities associated with this unit standard must comply with the requirements of: Health and Safety in Employment Act 1992, Copyright Act 1994, Human Rights Act 1993, Privacy Act 1993, and their subsequent amendments. The Official Information Act 1982 and the Public Records Act 2005 also apply within public sector organisations.
- 2 Definition
Copying refers to the reproduction of documents using photographic or electronic technology.

Outcomes and evidence requirements

Outcome 1

Use office information systems in accordance with office requirements.

Evidence requirements

- 1.1 Information is obtained from electronic and manual information systems and reference sources.
- 1.2 Office supplies are ordered, stored, and distributed.
- 1.3 Information is managed in accordance with a records management system.

Range information is – stored, retrieved, disposed of;
records management system – manual, electronic.

Outcome 2

Use electronic copying equipment in accordance with office requirements.

Evidence requirements

- 2.1 Copyright provisions relating to copying documents are outlined in accordance with legislative requirements.
- 2.2 Equipment for copying documents is described in terms of features, cost implications, and convenience.
- 2.3 Documents are copied.
- | | |
|-------|---|
| Range | reduction, enlargement, double-sided copying, collation, memory facilities, by-pass sheet feeder, colour copying, finishing options, alternative paper trays; evidence of four is required. |
|-------|---|
- 2.4 Equipment malfunctions are addressed according to equipment and office requirements.

Outcome 3

Use office telecommunication systems in accordance with office requirements.

Evidence requirements

- 3.1 Features of office telecommunication systems are used in accordance with operating instructions.
- | | |
|-------|---|
| Range | systems must be selected from – a small business system; telephone answering machine; voicemail system; teleconference facilities; telepager; call waiting, call diversion, speed dial; mobile phones; Voice-over Interactive Protocol (VoIP, eg Skype); evidence of at least two features each of four systems is required, including a voicemail feature. |
|-------|---|
- 3.2 Text, image, and sound based telecommunications systems are selected and used to achieve specified communication tasks.
- | | |
|-------|---|
| Range | specified communication tasks may include but are not limited to transferring – sound, images, text, multimedia; evidence of two is required. |
|-------|---|
- 3.3 Office requirements for using telecommunications systems are described in terms of ethics, security, access, records, copyright, health and safety, confidentiality.

Planned review date	31 December 2015
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Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	30 March 1993	31 December 2012
Review	2	27 June 1996	31 December 2012
Review	3	28 April 1997	31 December 2012
Review	4	28 June 1999	31 December 2012
Review	5	26 September 2005	31 December 2012
Review	6	9 December 2010	N/A

Accreditation and Moderation Action Plan (AMAP) reference	0113
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This AMAP can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

Exercise Files used in this book

(Instructions are at the front of this book for downloading retrievable files from our web site.)

Names of files	
Employee Exit Checklist	Stationery Order Form
Employee Information Sheet	Strongman Tools

Sample Document

Office Information Systems Office Equipment and Supplies Records Management

Learning Outcomes

At the end of this section you should be able to -

- ☐ Identify basic office information systems used in a variety of office environments.
- ☐ Explain how office supplies are ordered, stored, and distributed.
- ☐ Describe how information is managed using a records management system.
- ☐ Understand the difference between a manual and an electronic records management system.

Introduction

Basic Office Information Systems

Within an office setting, an information system can be used for the purpose of:

- Organizing people, activities, or machines.
- Gathering and processing data.
- Supplying information to necessary people.
- Cataloguing information inside and outside of a business.

Depending upon the type of business that is run, there are a wide variety of information systems that can be used.

Note

Keep in mind that a single information system can be used for an office setting, or *several* information systems can be combined to create a new type of information system for larger corporations. In fact, many businesses may use multiple types of information systems in conjunction or separately under one roof.

Senior management may need a specific type of support to help create a business plan; middle-management staff may require a detailed information system that will help to control day-to-day business operations and manage sales reports. Employees may require a separate information system to process daily tasks and communicate with customers.

Here are the basic categories of office information systems to consider for business and administrative use:

- **Executive Information System**

An EIS is a management information system that is used to provide information to senior executives to support their decision-making process.

The basic purpose of an executive information system is to offer quick access to internal and external data that will help to support the goals and strategies of a business organisation.



Many administrators consider an executive information system to be a specialised type of decision support system, described below.

Example: An ESS will most often be used by senior management to track important business activities from one concise control panel. This could include data analysis and business modelling to create possible best-case and worst-case scenarios that support a strategic decision-making process.

- **Decision Support System**

A DSS is a computerised information system that provides organisation to help with basic decision-making. In most cases, a decision support system is software that will give an employee or manager access to documents, data, reports, and business models to allow for easier problem-solving.

Example: A decision support system will often consist of a spreadsheet database used to quickly gather and analyse information. Alternative options can be created to provide several possible outcomes using "what if" scenarios.

- **Management Reporting Systems**

A management reporting system is used to provide data about a business's daily, monthly, quarterly, and yearly performance. This information is often taken from data generated by knowledge management systems, described below.

Example: Management reporting systems will normally be used internally by middle-management and supervisors to run reports and create summaries of daily sales activities.

- **Business Intelligence Systems**

A business intelligence system is a technology or application that provides a greater perspective on business operations based on history, present performance, and future predictions.

Example: Business intelligence technologies may use analytics, benchmarks, data mining, and reporting to research and provide predictive information regarding a business's outcome for the future.

- **Office Automation Systems**

Office automation systems provide organised information for administrative purposes, whether it is data, documents, or email. A customer service oriented business may use an office automation system that focuses on Customer Relationship Management, or CRM. In most cases, this type of office information system is Internet based.

Example: A wide selection of software systems can be used to improve employee productivity within an office space, or the same software systems can provide employees with support when travelling or working from home. These software systems may include Microsoft Office or a cloud-based system.

Note

A **cloud-based system** is used for computing and storage and will hold data within a larger network. A business will store information with a cloud provider by buying or leasing additional space. The advantage is that a company will only have to pay for the storage space that they use, enabling them to save money. A company also won't need to install their own physical storage devices in their computers to save both space and money.

- **Knowledge Management System**

A knowledge management system is different from a basic office information system since it is often smaller and used to create and share information within a business.

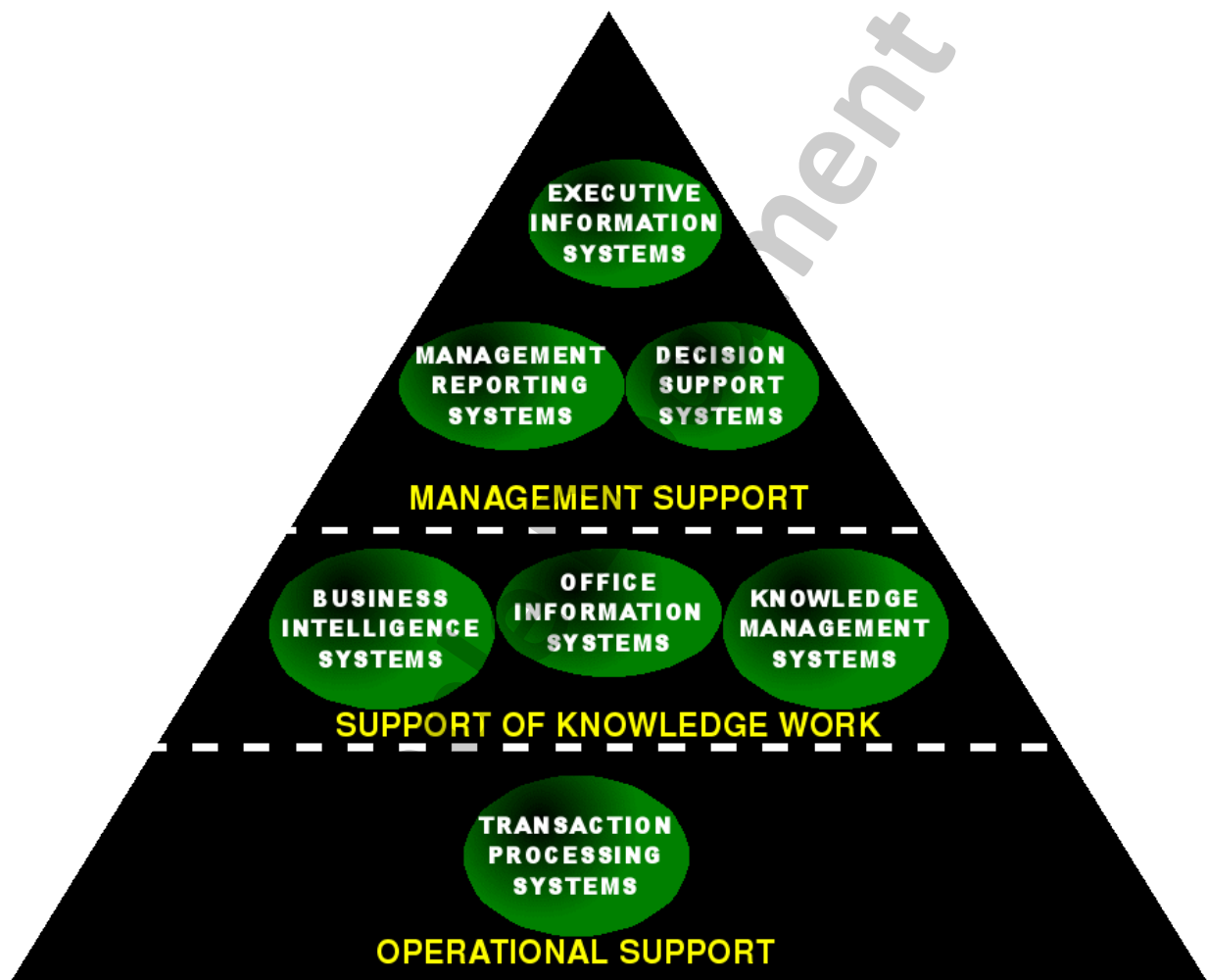
Example: A knowledge management system may be used in a law or accounting firm, where employees will rely on their own knowledge and expertise to share data within a company. This knowledge may be stored in spreadsheets, PowerPoint presentations, or Word documents and saved for further use.

- **Transaction Processing Systems**

Transaction processing systems are used to quickly process routine transactions in an accurate manner.

Example: This may include a transaction processing system to calculate payroll and taxes for employees or a billing system that will manually or automatically send invoices to customers. A business can also use an inventory purchasing system to calculate their current inventory and supply and indicate the need to order new stock of particular items.

Here is a helpful diagram to help you better understand basic office information systems:



Exercise 1

Review the following scenarios and decide which basic office information system would be used in a business environment:

- 1 The management staff in an office needs to run an employee labour report to find out ways to cut back on wasted labour to manage the quarterly budget.

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- 2 A receptionist in an office needs to calculate the monthly billing invoice for a customer and send them a bill for payment via email.

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- 3 An employee in an office needs to revise the employee handbook and store it in the company database so it can be used to train all new employees.

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- 4 The CEO of a company needs to determine if introducing a new product to the market would help to improve the company's sales or cause them to lose money in the next five years.

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- 5 An employee at an advertising agency would like to create a PowerPoint presentation for a new client to demonstrate the advertising services that the company offers.

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Uses for Office Information Systems

No matter what type of office information system that a company uses, it will serve two basic purposes in the workplace:

- 1 It will determine how work is coordinated, organised, and focused to produce either a product or a service that is sold to a customer.
- 2 It will establish a work flow of knowledge, information, and materials to influence daily employee activity.

In short, if an office information system isn't established for a company, an office will not be able to coordinate their work processes to sell a service or a product to a customer. If an office isn't able to sell to a customer, then they won't be able to keep their doors open since they won't be making any profit!

Once a customer-business relationship is established, an office information system will continue to dictate *how* employees work each and every day. If a company doesn't have an office information system that establishes daily workflow, then employees won't know what to do each day to stay on task and meet their productivity goals.

Note

Depending on the type of industry that a business caters to, its office information system can be tailored to meet the unique needs of both customers and employees.

As an example:

- A human resources department will require a human resources system to manage employee data, organise payroll, and hire new job applicants.
- An accounting office will require an accounting system to organise accounting data, bill customers, and keep track of all clients for the past, present, and future.
- A manufacturing company will require a manufacturing business system to monitor employee labour, track stock and inventory, and bill and invoice customers for the products that are manufactured.
- A marketing and sales firm will require a marketing system to organise their list of clients, keep track of quarterly and annual sales, and bill clients on a regular basis for their services.



Across-the-board, using the right business information system will help to streamline a business's daily processes to make communication between owners, employees, and customers significantly easier.

Additionally, a business information system can be used for the purpose of marketing to reach new customers and determine how effectively an advertising budget has been spent. Many offices may use a business information system that conducts email marketing as a cost-effective way to advertise to new customers using an email newsletter with coupons and business updates.

This type of functionality will improve daily business processes to boost productivity. This is especially critical for small businesses that need to make the most out of all technological tools that are available to them to help employees get daily tasks done even more quickly and effectively.

A business system may help a company to:

- Print marketing materials.
- Provide better customer service.
- Chat with customers online or via email.
- Support call centres with sales scripts and relevant customer data.
- Allow remote employees to telecommute.
- Teleconference with multiple employees in remote office locations.

Today, many offices are using technologies like video and teleconferencing to connect with colleagues working from home or located in offices all over the world. Teleconferencing and web conferencing can be achieved through Webcams and programs like Skype to conduct an online meeting without having to pay for the cost of travel.

In a teleconference meeting, employees can share documents and data that have been organised in a business information system. Likewise, teleconference meetings can be scheduled, monitored, recorded, and stored in an electronic business information system for later use.

Exercise 2

- 1 Provide an example of how an accounting office would use a knowledge management system.

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- 2 Provide an example of when a human resources department would use an office automation system.

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- 3 List two ways that a business information system could help a company to increase productivity.

a

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b

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Manual versus Electronic Information Systems

Today, a large number of business owners have chosen to use electronic versus manual information storage to make it easier to automate daily processes and communicate with employees.

When it comes to keeping records, many business owners switch to electronic record-keeping systems since it is easier to input data, automate accounting processes, and quickly fix errors before they lead to more serious mistakes.

An electronic business information system is critical when managing payroll and inputting annual tax information in order to meet both legal and tax requirements.

The Difference Between Manual and Electronic Information Systems

A manual information system does not require the use of computers. Most information is taken down by hand in the form of written records and ledgers. This can apply to all of the information systems described above, where data will be compiled manually and written by hand in files or paper documents.

Conversely, an electronic information system will intake all data and information digitally to be stored on a computer via software or the Internet. A manual information system can organise information without the use of electricity; with the use of an electronic information system, electricity and often a connection to the Internet are required in order to store data.



Examples of a manual information system include a Rolodex, a paper phonebook, a printed product manual, and a paper filing cabinet.

Examples of an electronic information system include a computer database, customer billing software, an e-commerce shopping cart, and a Microsoft Excel spreadsheet.

Next, let's explore the advantages of both manual and electronic business information systems.

Manual Information System Advantages

- It is less expensive to use than an electronic information system.
- In some cases, correcting a manual entry may be easier than correcting an electronic entry with more complicated data processes.
- There is minimal risk in corrupting data or losing valuable information.
- There is little risk of creating duplicate copies and confusing recorded data.
- A manual business information process is simple if an employee is unfamiliar with using office software.

Electronic Information System Advantages

- It is easy to record a wide variety of business transactions, such as payments, invoices, income, expenses, stock, inventory, assets, and much more.
- It is a more efficient way to track long-term financial records, requiring less storage space than physical files.
- It offers the option of recording a sale to generate an invoice without having to receive a cash or credit payment from a client in order to do so.
- It provides a simpler method to generate reports, financial statements, orders, invoices, employee payroll, and basic inventory statements.
- It will automatically tally daily, monthly, and annual numbers to provide concise reports when needed.
- It will stay up-to-date with the latest tax rates, laws, and regulations.
- It can be set to automatically communicate with and invoice clients, order stock and inventory, and submit tax reports at the end of the year.
- It can be protected by creating backup records or storing information in cloud storage to preserve valuable data in the case of a computer crash.

It is a business owner's choice whether a company uses a manual or an electronic information system. An employee may work in one office that relies entirely on electronic and digital technology to compile data and communicate with other employees and customers. The same employee may switch jobs to work at a competing business and find that the company primarily uses manual records and data tracking to manage sales and customer relationships.

To see the best results from using a manual or an electronic information system, it is important to keep the points in mind that are shown on the next page.

Manual Information System Best Practices

- All paperwork must be sorted, stored, and organised in a detailed filing system for twelve separate months of the year.
- A business must keep all original documents and clearly indicate the date of correspondence or payment.
- All sales transactions must be recorded with specific payment amounts.
- All online financial transactions that are made must be stored by month and year as physical files in a filing cabinet.
- All income and expense statements from banks and credit cards must be stored in the appropriate file folders by month and date.
- Paper statements and bills should be requested from banks, credit card companies, customers, and debtors to be filed appropriately on a monthly basis.

Electronic Information System Best Practices

- The right software or electronic database must be chosen so that all employees can use it to input data and communicate on a daily basis.
- All electronic information must be backed up regularly to make sure that records are stored safely and protected from a computer crash; daily backups are recommended.
- Employees must regularly use record-keeping capabilities for indexing, retrieving, reproducing, and saving digital records.
- Staff must make electronic records as legible and clear as possible for access by other employees.
- A business must implement record management protocol so that all employees will use the same methodology and rules to access and retrieve digital records.
- Strict confidentiality must be required for all employees with access to a business information database.
- Once paper records have been transferred to an electronic database, they should be disposed of to prevent duplication and wasted space.
- It is recommended to use a business information system that complies with legal and government guidelines for taxes, employee payroll, and customer invoicing.

To wrap up the differences between manual and electronic information systems, on the next page is a helpful chart that compares how an electronic system will change the way that a business interacts with customers each day:

Visitor Management Information System Comparison Chart

	Manual	Electronic
Customer Check-in	A customer or visitor will sign in manually to a guestbook when visiting a business.	A receptionist will input a guest's information into a computer to check them in for their appointment.
ID Badges	Visitors will be provided hand-written ID badges to show that they are guests.	Electronically printed ID badges will be given to visitors with a photograph for security clearance when necessary.
Restricted Access	Visitors will be issued different coloured ID badges to control their access to secure areas.	Visitors will be given swipable ID badges that will grant access to secure areas automatically.
Visitor Tracking	It is almost impossible to track visitors with a manual sign-in sheet.	Visitor reports can be generated daily to track the amount of guests and/or customers that attended scheduled appointments.
Emergency Evacuation	A manual sign-in sheet will make it difficult to determine if guests are still in the building in the case of an emergency.	An electronic scheduling information system will verify which guests have checked in and checked out if a building needs to be evacuated for a fire or another danger.

Exercise 3

- 1 Explain the basic difference between a manual and an electronic information system:

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- 2 Would it be a good idea for a law firm to keep all of their records manually, including legal documents, invoices, and employee payroll material? Why or why not?

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- 3 List two benefits of using a manual business information system.

a

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b

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- 4 List two benefits of using an electronic business information system.

a

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b

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- 5 Explain in detail one way that a business can see the best results from using a manual business information system.

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How to Transition from a Manual to an Electronic Information System

As an office employee, you may be required to participate in the transition from a manual to an electronic information system. To better understand how a manual information system will be transferred to an electronic database, here are the steps in the process:

1 Purchase Software

A business will shop and compare rates from many different software providers to choose the right software program to best meet the needs of their company. Today, software has been developed for a wide variety of purposes and applications.

Software can be customised to an individual business niche, such as accounting, automotive mechanics, retail customer service, telecommunications, or even a hair salon.

A business may choose to purchase a software package that is already developed to streamline their business processes, or they can pay a software developer to create unique software that will best meet their business needs.

Hiring a software developer is much more expensive than purchasing software that has already been developed for the market. Additionally, hiring a software developer may require much more time in the developing process to troubleshoot and debug program errors along the way.

